

Settings - Tenant - Location Setup

Purpose

Location setup is where libraries configure the four parts of the item location tree.

They are hierarchical in relationship - from top down:

- Institution: [Settings - Tenant - Location Setup - Institution](#)
- Campus: [Settings - Tenant - Location Setup - Campus](#)
- Library: [Settings - Tenant - Location Setup - Library](#)
- Location: [Settings - Tenant - Location Setup - Location](#)

Locations is labeled as Locations but libraries may find it helpful to think of it as "Shelf Locations" in terms of a mental model.

In addition, FOLIO has concepts of **permanent location, temporary location, and effective location**.

Holdings and Items may have permanent and/or temporary location values. Locations are set at the holdings level and inherited by the item record, but can be overridden at the item record.

See [Effective Location Logic](#) for more information on how Effective Locations are calculated. Circulation rules will use an item's Effective Location when applying business logic to transactions.

Considerations for Implementation

An individual location is required to have at least one associated Service Point. That means you will likely want to create your Service Points before creating Locations.

The four pieces of the location hierarchy are available criteria to use in [circulation rules](#). That means you will likely want to think about the other pieces of the circulation rule system - material type, patron type, and loan type - along with developing locations.

Once locations are modeled, they are actually attached to holdings and items through records managed in Inventory and associated workflows. **That means that the creation of a library's location structure is very much cross-functional** for circulation and technical services areas, and libraries who are going through this process should ensure that staff in those areas are represented as part of the planning process.

Permissions

There is one permission control currently implemented for this area of Settings:

- Settings (tenant): Can create, edit and remove locations

There are no action-based permissions currently implemented for this area of Settings. If that changes, please update this information.

UX/UI

There is no specific UX/UI as part of this area of FOLIO. This is simply an organizing area in the Tenant section for the individual pieces of the location tree.

Searching

There is no searching functionality currently implemented in this area of Settings.

Functional workflows

There are no functional workflows associated with this area of Settings - rather, there are workflows associated with the creation of the pieces of the Location tree.

Hopefully an early implementer may be willing to document how they constructed their complete Locations framework, and that documentation could be linked here.

Reporting

There is no reporting functionality currently implemented in this area of Settings.

Integrations

Associated github modules:

- <https://github.com/folio-org/ui-tenant-settings>

There are no specific integrations for this area of FOLIO developed at this time.

Libraries will find that their migration process from existing systems will require integrations into this area of FOLIO to create locations, if they wish to map them from existing data (such as location information in MARC records.)