Settings - Tenant - Location Setup - Location

Purpose

Location is the fourth and most detailed level of the Location hierarchy.

- Functionally, librarians may think of this as a "shelf location". Examples might include stacks, reserves, closed materials.
- Each location must have at least one service point associated, and designated as primary.
- Locations may also have additional service points that are non-primary.
- When an item is returned at another service point that is not associated to the location, it is put in transit to the primary service point.
- When an item is checked in at a non-primary service point, it is NOT put in transit to the primary service point.
- The four pieces of the location hierarchy are available criteria to use in circulation rules.

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

- Holdings and Items may have permanent and/or temporary location values.
- 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.

Permissions

Describe permissions that apply to the app or section you are outlining. Include default permissions and permission sets; dependencies that exist with permissions in other apps/parts of FOLIO.
Describe action-based permissions (if any) that apply to the app or section you are outlining, including permission dependencies and associated functional workflows.
Describe what each permission does, in language accessible to non-IT library staff.

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

Describe out of the box fields, including designed purpose, data requirements and validation, dependencies between fields.
Describe out of the box accordion menus, including purpose of the menus, customization options, and associated permission controls (if any)
Describe any workflows available through navigation menus, including purpose of the workflow, customization options, and associated permission controls.

Locations have configurable options, including:

- Folio Name
  - The **FOLIO Name** must be unique within the tenant - i.e., no other location can have the same FOLIO name.
- Code
  - The **Code** must be unique within the tenant - i.e., no other location can have the same code.
- Discovery Display Name
- Associated Service Point
- An Active or Inactive Status
- Description Field
- Location Details
  - Location Details is an accordion where libraries can add associated key/value pairs to a location record.

Searching

Describe pathways for searching in the app/feature through the UI.
Describe fields that are indexed in the back end specifically for searching
Describe any advanced searching features and how they would work.

Functional workflows

Describe available tasks that can be conducted in the app. To document those tasks, create a new page and link it to this page.
Describe action-based permissions that are connected to these functional workflows, if any.

- Edit, Create, Delete Location
- Add Service Point to Location
- Remove Service Point from Location

Reporting

Describe available in-app reports, including parameters for the reports, and associated permissions.
If there are developed LDP reports/queries for this app / area of FOLIO, describe those reports as well.
List any fields that may not be available in the LDP (e.g., for privacy reasons.)

Integrations

Describe any APIs that interact with the app. Provide links to the API / module information in Github.
Describe integrations that individual libraries may wish to develop for this app / area of FOLIO, if relevant.
If existing integrations have been developed by adopting libraries, provide links to the integration in Github or wherever the information can be found.

Considerations for Implementation

Describe decisions or implications that need to be considered when implementing this feature.

Include topics such as order of operations during implementation or affects of implementing in a certain way.