

Settings - Tenant - Location Setup - Institution

Purpose


Institution is the highest level of the Location hierarchy.

FOLIO libraries will need at least one institution created to be able to populate elements down the hierarchy like campus, library and location.

The four pieces of the location hierarchy are available criteria to use in [circulation rules](#).

Considerations for Implementation

- Institutions that need to support multiple timezones should monitor

 **UXPROD-592** - Multiple Language and Localization settings per institution (was Multiple timezones per institution) [OPEN](#) . Currently there is one timezone setting per tenant so multiple timezones are not supported in a single-tenant implementation.

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

Institutions are created through a settings table (that may look familiar as this is similar to other areas of Settings.)

Available Institution fields are

- Institution
 - Required
 - Used in circulation rules
 - Name must be unique at its level of the hierarchy - e.g., you can't have two institutions with the same name.
- Code
 - Required
 - Used in circulation rules
 - Code must be unique at its level of the hierarchy - e.g., you can't have two institutions with the same code. Note that as of Q12020 you can actually save two institutions with the same code - this is a bug. See

 **CIRCSTORE-143** - In CRUD of Institution, campus and library the code should be unique [OPEN](#) for the status of the bug.

In addition, you have

- Last updated by
 - Displays date of last update and name of user who did update
 - Refreshes when value is saved
- # of locations
 - Automatically generated to show # of locations attached to Institution
- actions
 - Two options - pencil icon (edit) and trash icon (delete)
 - Trash icon gives error message and does not allow deletion if locations are attached to the institution

Searching

There is no default search function in the GUI for Institution records.

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.

- Creating, Editing, Deleting Institutions

Reporting

There are no in-app reports available in this section of FOLIO.

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.

Describe and include any permanent links such as a link structure to records, searches, etc