

Effective Location Logic

FOLIO will be implementing locations as follows:

- Permanent and temporary locations can be assigned at the holding level
- Locations from the holdings record are automatically inherited by any items associated with the holding
- BUT both permanent and temporary location can be overridden at the item level, if needed
- When item-level overrides are removed, the inheritance from the holding resumes

The "**effective location**" is used by FOLIO and other integrated systems to know the current home location for the item. This will be used to determine the appropriate loan policy, where it needs to be reshelved etc. It is the effective location that will be displayed in other apps in FOLIO (e.g. Check out, Check in, Loans, Requests etc).

Logic for Calculating the Effective Location

The determination of Effective Location is a ring-down algorithm. The first Location to be found in the following ring-down order will be used as the Effective Location

1. Item Temporary Location
2. Item Permanent Location
3. Holdings Temporary Location
4. Holdings Permanent Location

Use Cases

Scenario 1:

	Permanent	Temporary
Holdings	A	
Item		
Effective location for item = A		

1. ~~Item Temporary Location~~
2. ~~Item Permanent Location~~
3. ~~Holdings Temporary Location~~
4. **Holdings Permanent Location**

Scenario 2:

	Permanent	Temporary
Holdings	A	B
Item		
Effective location for item = B		

1. ~~Item Temporary Location~~
2. ~~Item Permanent Location~~
3. **Holdings Temporary Location**
4. Holdings Permanent Location

Scenario 3:

	Permanent	Temporary
Holdings	A	B
Item	C	
Effective location for item = C		

1. ~~Item Temporary Location~~
2. **Item Permanent Location**
3. Holdings Temporary Location
4. Holdings Permanent Location

Scenario 4:

	Permanent	Temporary
Holdings	A	B
Item	C	D
Effective location for item = D		

1. **Item Temporary Location**
2. Item Permanent Location
3. Holdings Temporary Location
4. Holdings Permanent Location

Scenario 5:

	Permanent	Temporary
Holdings	A	
Item	B	
Effective location for item = B		

1. ~~Item Temporary Location~~
2. **Item Permanent Location**
3. Holdings Temporary Location
4. Holdings Permanent Location

Scenario 6:

	Permanent	Temporary
Holdings	A	
Item		B
Effective location for item = B		

1. **Item Temporary Location**
2. Item Permanent Location
3. Holdings Temporary Location
4. Holdings Permanent Location

Scenario 7:

	Permanent	Temporary
Holdings	A	B
Item		C
Effective location for item = C		

1. **Item Temporary Location**
2. Item Permanent Location
3. Holdings Temporary Location
4. Holdings Permanent Location

Scenario 8:

	Permanent	Temporary
Holdings	A	
Item	B	C
Effective location for item = C		

1. **Item Temporary Location**
2. Item Permanent Location
3. Holdings Temporary Location
4. Holdings Permanent Location

Other scenarios?

Review by MM (3/12/2020), RA, and RM - March 2020

Scenario 1 & 2 above are assuming an item with no location specified in the item record.

Following scenarios (Scenario 9 and Scenario 10) describes the scenario where there is only a holdings record, and no associated item.

This will occur, and is not just for online materials. Cornell does this currently, for example, for rare materials.

We need to solve how to include these scenarios in Inventory basic search, Filtering on Effective location - *to be discussed further (Laura Wright, Charlotte Whitt)*

Scenario 9:

	Permanent	Temporary
Holdings	A	
Effective location for holdings = A		

1. ~~Holdings Temporary Location~~
2. **Holdings Permanent Location**

Scenario 10:

	Permanent	Temporary
Holdings	A	B
Effective location for holdings = B		

1. **Holdings Temporary Location**
2. Holdings Permanent Location