

Location Renaming Project

Target release	To be determined
Document status	IN PROCESS
Document owner	Thomas I. Trutt

Working documents:

<https://cornell.box.com/s/8vhcbivb3rv1nccbw6nmqrce682k9xj3>

CUL Naming Conventions:

<https://www.library.cornell.edu/about/staff/central-departments/library-communications/communication-tips/style-guide/#names>

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Purposed implementation date:

July, 2023

Goals

- Update FOLIO to match the current needs of supported units.
- Clean up location data to match all naming guidelines.
- Provide a data that can inform feature cleanups, additions, removals or change.

Background and strategic fit

In January of 2023 we were contacted by Library Communications with a request of updating the unit names in the discovery layer to be in line with CUL naming conventions¹. After a review of the naming conventions, locations in FOLIO and name mappings for the discovery layer a few trends were noted.

1. There are locations that are no longer used or wanted by unit libraries.
2. The discovery layer has its own set of locations that are extrapolated from a FOLIO location code and extra data like call number prefix or notes.
3. Some locations have been repurposed which has resulted in a name mismatch. Example ENT (entomology) is labeled Mann New Bookshelf.
4. Units have requested new locations to manage special locations and departmental collections.
5. There seems to be no consistency in the naming of location codes.
6. Location codes do not match location names.

One contributing factor to the above trends was in Voyager, our previous system, the addition of new locations or removal of locations was a very difficult task. Locations needed to be added to an ini file and circ matrixes needed to be created and updated for each location. The nature of FOLIO's circulation rules and location management system makes the creation and renaming of locations a trivial procedure. That said there are multiple departments that would be directly affected by any changes to locations and must be included in any purposed changes so they can update local systems and workflows accordingly.

Because the request to update the names in FOLIO and the discovery layer touches so many locations it was a good opportunity to fully review locations in FOLIO and perform an overall cleanup. Normally the scope of the project would be limited to what was requested, but because of the number of effect systems and workflows it may be more efficient to address all the above issues at once instead of multiple smaller changes. This point will be one that will be explored during our fact-finding mission. If it is deemed to be to large of a task to do at once this project will be split into smaller sub-projects done over a length of time.

¹Naming Conventions: <https://www.library.cornell.edu/about/staff/central-departments/library-communications/communication-tips/style-guide/#names>

Assumptions

Requirements

#	Title	Notes	Importance	Results
1	FOLIO and Discovery layer locations meet the current needs of the unit libraries	<ul style="list-style-type: none"> Changes will be determined during the fact-find part of this project. If there are two many changes this may be completed as a sub-project. 	POSSIBLE SUB-PROJECT	<ul style="list-style-type: none"> With the exception of a few locations the current locations in FOLIO meet the needs of the units. There have been some requests to add and remove a few locations.
2	FOLIO and Discovery layer locations adhere to the CUL naming conventions		MUST DO	
3	FOLIO location names and location codes adhere to any established patterns	<ul style="list-style-type: none"> Changes will be determined during the fact-find part of this project. If there are two many changes this may be completed as a sub-project. 	POSSIBLE SUB-PROJECT	Yes. Location codes that do not currently match the locations they are under, for example ILR, and JGSM are required because of reporting issues. These codes also show ownership of the item, since it is not located elsewhere in the item records. So even though these codes do not match the names they fall under they provide required data on the records and can not be changed or combined.
4	Gather a list of all connected systems that relay on FOLIO locations that must be updated to use any new or changed locations		MUST DO	
5	Coordinate any changes in FOLIO with other system changes that must be made at a departmental level to ensure little or no downtime		MUST DO	

Affected Parties

#	Department	Contact	System Workflow	Required Changes	Time Line
1	ILS		Illiad	Possible changes to LDS Logic	
			ReShare (Borrow Direct)	Possible update of the mapping tables.	
2	Library Annex		CiaSoft	None as long as location Codes adhere to the current patterns	
3	Data Import		Mapping profiles	None as long as location Codes adhere to the current patterns	
4	LTS / TS		Marcos	Very little as long as internal names are not changed.	
			Workflows		
5	Access Services		Workflows	little to none.	
6	Discovery and Access		Solr Mappings	New facet names will need to be added to the mapping tables	
			UI ?		

7	Reporting			New location names, and codes will need to be added to the reference tables Some queries that use the FOLIO location name will need to be updated.	
8	Outside Venders		Batch import files	Venders would need to be contact to an location code changes as they are included in batch files supplied by them.	

User interaction and design

Questions

Below is a list of questions to be addressed as a result of this requirements document:

Question	Outcome
What location names need to be changed to be in-line with CUL naming conventions?	See list
What is cost / benefit analysis of changing Location Codes?	Changing location codes would require major changes in both internal and external systems, with very little to no benefit to users.
Should internal location names be changed? Are there any requirements in place that would compel them to be changed?	Only a few names are being changed to help clarify workflows for staff.
What locations need to be can be removed?	See list
Can extrapolated names be moved to FOLIO locations?	See list
What departments and systems are affected by any name changes, removals or additions?	
What is the projected timeline to update any effected systems to us any new/changed names in FOLIO?	

Not Doing

- This project will not create, edit or update any policies around the creation, modification or deletion of locations within FOLIO. Information gathered from this project will be passed along to the appropriate parties so that they may craft a policy to guide future changes.
- The project team will not update, create or move any library records to new locations. It will be up to units to coordinate this work with LTS / TS after the locations have been updated in FOLIO.
- The team will not directly edit any other systems or write any workflow changes but will notify affected parties to ensure that those systems and workflows are updated to coincide with FOLIO system changes.

To be discussed. If we are creating new locations to replace call number prefixes it may make sense for this working group or a sub-group to also move the effected records. These points will be reviewed and finalized by the working group.

Time Line

- Fact finding – 1 to 2 months. This part of the timeline will vary greatly based on being able to get on committee agendas, staff availability etc.
- Data collation – 1 week. The bulk of this work will be done in parallel with fact finding. A final week will be needed to finalize the report, for review and sign off by the affected parties.
- Communication – 1 week.
- Prepare and test changes - 2 weeks. Scripts can be crafted at the beginning of the project to update, change and delete locations. Scripts can be finalized during the communication period and applied to the test systems after its competition. The 2-week period is to allow staff to review and sign off on changes.
- Deployment – Variable. All affected parties will have to agree on a deployment date. Deployment may also need to be held off based on if code changes will need to be made to accommodate purposed changes.

Weeks												
1	2	3	4	5	6	7	8	9	10	11	12	13
Fact Finding												
Data Collation												
									Comm.			
Script Creation												
										Testing		

