

2023-05-09 Meeting notes

Date

20 Mar 2023

Attendees

- [Thomas I. Trutt](#)
- [Cammie June Wyckoff](#)
- [Jacob Hiram Barnard](#)
- [@marcus Reed](#)
- [Pedro Arroyo](#)
- [Laura E. Daniels](#)
- [Jenn Colt](#)

Goals

- Start the fact-find portion of the project.
 - Identify any other participants that should be invited to these meetings.
 - Discuss what should and should not be in scope of the project

Discussion items

| Time | Item | Notes |
|-------|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 5-min | Welcome and brief overview | |
| 5-min | Administrivia | <ul style="list-style-type: none">• Box documents• WIKI Space |
| | Overview | <ul style="list-style-type: none">• Initial request from Library Communications• What was found during looking into that request• Purposed new project scope |
| | Project scope | <ul style="list-style-type: none">• Is it to big? should be break it up into smaller projects.• Cost benefit analysis of one large project vs smaller projects |

Notes and takeaways

Reporting concerns:

- If we change location codes how will that affect reporting? Specifically how will it affect financial reports, stat reports etc, for historical data as well as future data?
- Are the queries using a location look up table or are the location codes text field in the the LDP tables.
- Would it be possible to update the codes in the LDP?
- Set up a meeting with the reporting group to go over their concerns and gather their input.

CiaiaSoft and the Annex

CiaiaSoft relies on the location codes for accessioning items into the Annex. If these codes change the middleware would also need to be changes which would result in an extra cost to the Library. Affected locations are the originating locations or main locations, IE Mann, Olin, Fine Arts, and the destination locations. The addition of new locations or changing sub-locations, (reserves, reference, etc) does not affect the annex.

There may need to be a workflow change made. Items that are in sub-locations, ie reference, would first need to be moved to the main collection location and then moved to the annex.

Collection Development / Access Services

'Main' collection locations are used for tracking purchases for those locations. Because of this locations that have been combined, ILR, HOTEL, JGSM, would still need to remain separate even though they share a physical space. This is because the locations are being used to track the 'Owner' of the items. This ownership information is transferred to the Annex as well as used in fee/fine ownership.

Will changing location codes / names affect ILLIAD, Borrow Direct and checked out items. In particulate are the location names or codes stored in these systems and are they being used as part of the check in process.

- FOLIO - Changing location names or codes will not affect anything already checked out as the circulation records use the location UUID.
- ILS / BD - to be determined

Discovery and Access

The catalog uses some complex logic and lookup tables to map call number pre-fixes and suffixes to virtual locations, request policies and indicate locations as non-circulating. If repeatable and standardized data patterns could be introduced into FOLIOs location data it would allow business logic in the discover layer to be simplified.

Any changes to the location names and codes in FOLIO needs to be synced with changes in D&A to ensure that locations are displayed in the discovery layer as expected.

Data Import

Addition of new location would not directly affect Data import as items are added to the the main location and the would be updated to its sub location. for example items would be added to Olin and then assigned a temp location of New and Noteworthy.

Technical Services

Other then ensuring that staff are fully informed of any changes there should be no real changes to workflows or procedures.

Action items

- ☐ [Thomas I. Trutt](#) will combine all changes into the working document for we can start reviewing it at the next meeting.
- ☐ [Thomas I. Trutt](#) will speak with [Debra Howell](#) to see if we can get access to the code that connects [CaiaSoft](#) to FOLIO.

Next steps

- Start reviewing the purposed changes for each location.
- Further discussion on if Location codes should be / need to be changed?

Additional takeaways

- It would be helpful if FOLIO had a way to track the ownership of an item. In discussions it has become clear that locations are being used to track the ownership of an item. This relates to the funds used for purchasing an item, fee-fine ownership as well as which unit has control over an item. This information should be held in another location with-in the folio record aside for the location. This would allow a location to be changed without affecting the item's owner.
 - TODO: Work with local parties to create a FOLIO Feature request.
- There is a desire to be able to store additional data at the location level in FOLIO to help the discovery layer respond to the needs of special locations. Currently Special Collection locations are in a hard coded table in the discovery layer. There are mapping tables for FOLIO locations to facet names, and mappings to handle special request paths for locations (Libforms, ILLIAD etc.). If this information was stored in FOLIO it would allow for easier configuration but also allow for more straight forward logic functions in the discovery layer.
 - TODO: Work with Erin Nettifee to change and refine, <https://issues.folio.org/browse/UITEN-193>, from a removal request to re-tolling the fields to allow for controlled vocabulary.
 - TODO: Speak with the other library that mentioned they would be using this and see if they are.