University of Arkansas Libraries
UARK Documentation: Adding a New Location; Changing a Location Code

References:
http://csdirect.iii.com/documentation/addabranchn.shtml
http://csdirect.iii.com/sierrahelp/Default.htm#sgil_loc_add.html

Note: The meaning or label of a location code (the "Branch Name" in the Branches Tables) can be changed at any time without going through the steps listed below. After a label changed has been approved, contact the Head of Technical Services, Deborah Kulczak, to make the change. The Web server will need to be restarted to see the change in the WebOPAC.

Requests for new or changed codes should be submitted to the Head of Technical Services, Cheryl Conway. As needed, requests will be discussed by the Innovative Review Committee.

Keep in mind: new locations can be created, but should not be used until the entire process below is complete.

1. Create the location codes for the new branch in the BRANCH (location) codes table.
   http://csdirect.iii.com/sierrahelp/Default.htm#sril_sys_param_branches.html
   Done in: Sierra desktop
   Done by: Kulczak

2. Ask III to Update Scopes (service commitment)
   Done in: III admin
   Done by: Juhl, Roser

3. Update other System-wide settings
   Done in: Admin Corner
   Done by: Juhl, Roser
   a. Location Mapping Table (Additional System Options > Maintain Record Links > Examine Location Mapping Table)
      http://csdirect.iii.com/sierrahelp/Default.htm#admin_admin_corner_examine_location.htm
   b. Locations Served (Additional System Options > Alter System Parameters > Circulation Parameters > Locations served)
      http://csdirect.iii.com/sierrahelp/Default.htm#admin_admin_corner_loc_served2.html

4. Update Advanced System Admin, as needed
   Done in: Sierra desktop
   Done by: Juhl. Roser
   a. Holdings Symbol Table (if new bib level location with a new OCLC code – unlikely)
      http://csdirect.iii.com/sierrahelp/Default.htm#sril_circ_param_lr.html
   b. Rules for Requesting
      http://csdirect.iii.com/sierrahelp/Default.htm#sgasaa_requestrules.html
5. Update Circulation Parameters, as needed
   Done in: Sierra desktop
   Done by: Juhl, Faulkner-Robinson
   a. Branch address table (if entirely new bib-level location, rare)
      http://csdirect.iii.com/sierrahelp/Default.htm#sril_circ_param_braddr.html
   b. Loan Rules and Loan Rule Determiner
      http://csdirect.iii.com/sierrahelp/Default.htm#sril_circ_param_lr.html
      http://csdirect.iii.com/sierrahelp/Default.htm#sril_circ_param_lr_dtr.html
   c. Days Closed and Hours Open tables (if entirely new branch, rare)
      http://csdirect.iii.com/sierrahelp/Default.htm#sril_circ_param_days_closed.html
      http://csdirect.iii.com/sierrahelp/Content/sril_circ_param_hrs_open2.html
   d. Statistical Group table (if entirely new bib-level location, rare)
      http://csdirect.iii.com/sierrahelp/Default.htm#sril_circ_param_statname.html
   e. Hold Pickup Locations table
      http://csdirect.iii.com/sierrahelp/Default.htm#sril_circ_param_holdshelfmap.html
   f. Time to Reshelve
      http://csdirect.iii.com/sierrahelp/Content/sril_circ_param_time.html
   g. Time to Holdshelf (if used in future)
      http://csdirect.iii.com/sierrahelp/Content/sril_circ_param_time2hold.html
   h. Library Priority table (not used currently – not compatible with title paging)
      http://csdirect.iii.com/sierrahelp/Default.htm#sril_circ_param_libpr.html

6. Update Circulation Options, as needed
   Done in: Admin Corner
   Done by: Juhl, Faulkner-Robinson
   a. Item types & locs for categories a, b, c, d (used for tracking the circulation of media types; not currently fully implemented)

7. Update record templates, as needed
   Done in: Sierra desktop
   Done by: Cataloging, Circ, Serials, Acq

8. Update WebOPAC
   Done in: Sierra desktop
   Done by: Juhl, Hurd
   a. LOC wwwoption (link to information about that location)
      http://csdirect.iii.com/sierrahelp/Default.htm#sril_record_display_options.html?Highlight=loc%20wwwoption
   b. Update Help pages and search forms, as needed
   c. Restart web server
      http://csdirect.iii.com/sierrahelp/Default.htm#sadmin_admin_corner_restartterminal.html?Highlight=restart%20web

9. Review any needed cleanup
   Done by: Juhl, Roser
   Review the Clean up after Training Document at
http://gsm.iii.com/doc/circ_cleanup_golive_11182006.doc for any needed actions

10. Alert users that the location code can now be used.

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