

New Location Parameter Setup and Go Live Checklist

Location Name: _____ **Code:** _____

Parameter Checklist

Location

- Copy an existing location and change the location code and address codes.
- Make sure billing notice amount is not set to zero.
- Make sure Serials CKI locations have been entered (if Serial module has been purchased)
- Make sure barcode and length are filled in appropriately.
- Make sure Calendar has 7 days per week and closed days are blank and not 0:00.
- Make sure the Exception Calendar is filled out appropriately.
- Fill in the PAC Locations for Primary and Secondary. This must be done for HIP to function.
- Add new location to the existing locations' PAC Locations.
- Fill in the Block Locations that this location will be allowed to see.
- Add the new location to any existing locations' Block Locations.
- Make sure there is a separate Reserve location if Reserve Bookroom has been purchased.
- Add new location to the Circ Point table if using Off-Line Circulation.
- Add new location to the Telecirc Control table if using Telephone Messaging.

Information Portal

- Make sure to add a profile in HIP for the new location.
- Update Pickup Sort Loc for the new location.
- Add the new location to the group_index and then word_index tables to import the new location as a limit in HIP. Run Mass Indexer in HIP.

Circ Privileges (circ_privilege_code)

Add the new location to the “zall” All Locations group in location_group

Copy any individual location privileges to the new location.

Add any exceptions that will be different from the location you copied.

Check to be sure Grace Period does not exceed 30 days.

Circ Parameters (circ_parameter)

Update Circ Parameters for new location

Add any exceptions needed

Circ Slips (circ_slip)

Add Circ Slips for to the new location if they will be used.

Notices (print_format_block)

Copy an existing location’s Auto Notice and Reminder Notice.

Make any changes to the formatting.

Acquisitions

Set up locations budgets and vendors as needed.

Serials

Check that the SCKI Location has been setup up in Location table.

Add the new location to any other location that can check in their books.

Create a location specific Media Type code if retention of the periodicals will be different from other locations.

Security Setup

Create new users for the location by copying existing users and then changing the default location.

New Location Go Live Checklist

Circulation

- ❑ Offline Circulation data load and process. Run Exceptions Report.
- ❑ Test the Request and Hold parameters, (be sure you have checked the Circ Parameters for this). If this is a multi-location library, be sure that the transit requests and holds are set up correctly.
- ❑ Test Check out and Check in.
- ❑ Test that barcode readers are working.
- ❑ Be sure that receipt printers have been set up correctly. If using Windows printing, make sure you have a form created in Windows and setup for that printer.
- ❑ Check the Holds Pull List report.

PAC / HIP

- ❑ Test searching in Staff PAC and HIP.

Cataloging

- ❑ Test the spine label printing. Make any adjustments.
- ❑ Setup Z39.50 searching if applicable.
- ❑ Test importing records.

Acquisitions

- ❑ Make sure the vendors and budgets have been set up correctly. Double-check the vendor address blink to make sure that the usage checkboxes are checked properly.
- ❑ Test EDIFACT ordering with vendor and response if it has been set up with the vendor. Make sure library's SAN is in each location record. Make sure vendor SAN, SAN Suffix and SISAC X-12 Serial Claims and Responses are checked if they will be using them.

Serials

- ❑ Check migrated Serials data (predictions, etc.) to be sure it looks OK – make sure that the Summary of Holdings is displaying properly in HIP and Staff PAC.
- ❑ Check copy records for multi-site locations if applicable. Create new media types if needed.

Day End

- ❑ Be sure that Day End is set to occur automatically at the appropriate time (before midnight).

After Day End has run

- ❑ Check the Day End activity log for errors.
- ❑ Check an Ad-Hoc stat report to make sure there are statistics for the new location.
- ❑ Test overdue notice printing (Notice Review and Notice Output).
- ❑ Check the Expired Holds report.

System Administration

- ❑ Check passkeys as necessary.
- ❑ Check setup of print_format_blocks for correct paper size and type and areas 1,2,3 information. Also check that they have set up a form with the correct size in Windows.
- ❑ Check default language (notice header) in blocks (TE block) for notice printing.
- ❑ Check the Roles and Privileges and the groups to which they are assigned.
- ❑ Check the User and make sure they are set to the correct ownership.
- ❑ Check the User and make sure they are set to the correct preference group. Default is Site Preference.
- ❑ Check Launcher setup.