**Item Policy ReMapping Project Plan DRAFT – High Level**

HLS – seek additions and changes from CRT and RMRS

**Purpose and Background of Project:**

When Tufts went live with Alma in Spring 2017, we were forced to migrate data quickly given the imppementation time, and had we known more about Alma, we would have made different choices in some areas.

One of these areas is item policies. These mapped over from Millennium ITEM TYPES, and in our system were a long list of item types at different levels of granularity that had accumulated over the years, and both provided statistical purposes of usage and fulfillment, and controlled loan rules

However, the design of Alma is such that these two functions are broken into two fields: item policy, which is for loan rules; and item material type, which is descriptive metadata. When we went live with Alma we just dumped everything in item policy. But really these are mean to control circ, so they are meant to contain policies such as “1 Day”. “3 Day” etc And then the item material type contains descriptive metadata. (Note this is also different from bib material type). Also per the design of Alma mostly location is supposed to control Circ and item policies is for exceptions. But there are a lot of exceptions among equipment /reserves.

**Proposal:**

Several different departments, including CRT and RMRS, would like us to migrate items such that we change their item policy to a loan length, and retain item type description in item material type

**Caveats:**

Initially Henry in LTS had been against a wholesale change in item policies because A it would cause longitudinal stat comparability problems, and despite any due diligence we do to prevent it, will certainly cause patron disruptions. The parameters that go into loan rules are item policies, item material types (which we don’t’ currently use), user groups, and locations. The number of total possible scenarios therefore are the cross product of these which would be ~90(item policies) X ~ 30 (user groups) X hundreds of locations. So it would be impossible to test all these.

We only have about a hundred loan rules, but many scenarios can put a loan in the same loan rule.

However, if we see these as caveats rather than blockers, and ***directors understand that there may be annual stat reports in Analytics they have to update potentially , and that there will be potential patron disruption ( we will obviously do this in the summer to mitigate this), and they agree to this,***then the goal is a good one. We just need a way to implement whatever changes are decided upon in the most seamless way.

HLS has worked heavily with each and all Circ desks to try to bring about consistency in loan rules , such that they uniformly implement policy , and loan rule changes are no longer made ad hoc , but always systemically by looking at all related loan rules before we change or add even one

But separating item policy and item material type data would further the goal of ease of cataloging and general management, once we can get there.

**Proposed Implementation:**

In order to implement the desired remapping of descriptive item policies to loan length item polices, I propose the following

* We scope this in stages
  1. the first stage being updating ***equipment*** item policies, and then moving to other things like media. Most of the item policy bloat we have is related to equipment
     1. But that we leave the one item policy “Media Equipment” out of this process. Media Equipment has so much architecture around it, including multiple analytics reports that facilitate daily processes, and now also the available equipment feature in Drupal, that avoiding disrupting this at all would be much preferable
     2. we just map all the equipment item policies over to item material type 1:1. And do this for all equipment items in question.
     3. CRT generates the full list of reports as they have so well done in analytics , but as **logical sets in Alma.** One for each set of items by item policy and location. The name of the set will express exactly what change needs to be done to thus group by RMRS
     4. To validate the mapping that CRT has already proposed , Henry will analyze this agains the loan rule report and as best as possible confirm that the change will result in no change to loan rule behavior
     5. Henry will add loan Length item policies t the list of item policies
     6. Henry will then update all loan rules containing equipment so that **in addition to** capturing conditions for item type type item policies , they also capture the new ones. This way the same loan rule will work both before and after the item policies and item material
     7. Henry and CRT will begin a project to identify all Analytics that contain equipment filtered by item policy and update this so that it is “OR’ed” with the same value that will now be in item material type. This should cause little disruption to longitudinal stats. If we slightly modify these later we may have to update again but we’ll have a list of reports
     8. Finally , around the turn of the fiscal year RMRS will go through all those sets and make the described item record updates
     9. After that at some point well beyond the change and the surge of the fall semester , we can start removing item policies from the list of. Configurations
  2. The second stage would be culling the list of descriptive metadata