September 2, 2019

FOLIO Library Services Platform

1. FOLIO Overview & Background

Overview, background and big picture "wow" stuff will appear here. Especially a description of the platform, microservices and advantages. Should include where the different data sets are stored in FOLIO as well as how data flows through the system. Focusing on raw features at this point for this document.

Architectural Diagram -

Recommendations for hardware/hosting/Misc configurations

Updates

Security & Privacy

2. Acquisitions

Acquisitions work entails all of the fundamental tasks of procuring content in all formats for use by library patrons, including vendor identification, purchasing, receiving and, and collections budget management. Automated processes, including integrations with content vendors and campus financial systems, should work seamlessly and efficiently. Folio should allow library staff to effectively manage its core tasks to support collection development and the procurement of content and services for library patrons while eliminating the need for double entry both externally and within FOLIO. FOLIO acquisitions represent a set of applications for the following domains/applications: Organizations, Finance, Orders and Invoicing.

A. Organizations

Organizations in FOLIO represent vendors, libraries, organizations within the library and any other entity the library will manage a relationship with. Organizations are used by orders, invoicing, receiving, agreements, licenses, ILL and any other application that requires access to this type of data.

Application	Feature set	Feature details
Vendors & Organizations	Search by	• All • Name • Contacts • Code • Language • Alias • Accounting code • Tax ID • Interfaces
	Filter by	• Organization status • Address category • Contact people category (configurable) • Country • Languages • Payment method • Stats available • Is vendor
	View list	Name, code, description, status, is vendor
	Sort by	Name
	View organization	Click organization to see: • Summary • Contact information • Contact people • Interface • Statistics
	Create new organization	Click “New” button to create: • Name • Description • Vendor flag • Code • Accounting code • Org status • Default language

		• Add unlimited alternative names
		• Add unlimited number of contact details (each)
		  o Address
		  o Phone
		  o Email
		  o URL
		  o Contact people
		• Add unlimited number of interfaces

	Edit organization	Click edit to modify the above
	Delete organization	Select delete option
	Settings	• Organization permissions o View only, create, update, delete or all • Create, edit & delete organization categories

B. **Finance**

Finance in FOLIO represents the management of budgets, funds, ledgers & fiscal years within the library. The following features are currently supported.

Application	Feature set	Feature details
Finance	Search funds	Funds can be searched by: • Name • Code • Tag (cannot tag a fund) • All
	Filter funds	Funds can be filtered by status: • Active • Inactive • Frozen
	View funds	Click fund to view: • Name • Code • Status • Description • Ledger • External Account number • Connected budget
	Create new funds	Click new fund button to add unlimited funds with: • Name • Description • Code • External Account number • Pick status

		• Pick ledger • Pick acquisition unit
	Edit fund	Click the edit button to modify: • Name • Description • Code • External Account number • Status • Ledger • Acquisition unit
	Delete fund	D.N.E.
	Settings	Fund permissions: • View only, create, update, delete or all
Finance	Search budget	Search by: • Budget name • Code • All
	Filter budget	Filter by: • Active • Inactive • Frozen • Fiscal Year
	View budget	Click budget to view: • Fund name • Funding allocated • Funding unallocated • Funding available • Status • Code • Allowable encumbrance percentage • Allowable expenditure percent • Allocation • Awaiting payment • Available • Encumbered • Expenditures • Over encumbrance • Fiscal year • Applicable fund
	Create budget	Click new button to create new fund with: • Fund name • Select status • Code • Allowable encumbrance percentage • Allowable expenditure percent • Allocation

<table>
<tr><td></td><td></td><td>Awaiting payment
Available
Encumbered
Expenditures
Over encumbrance
Select fiscal year
Select applicable fund</td></tr>
<tr><td></td><td>Edit budget</td><td>Click edit button to modify:
Fund name
Select status
Code
Allowable encumbrance percentage
Allowable expenditure percent
Allocation
Awaiting payment
Available
Encumbered
Expenditures
Over encumbrance
Select fiscal year
Select applicable fund</td></tr>
<tr><td></td><td>Delete budget</td><td>Click button to delete budget</td></tr>
<tr><td></td><td>Settings</td><td>Budget permissions:
View only, create, update, delete or all</td></tr>
<tr><td>Finance</td><td>Search ledgers</td><td>Search by ledger name, code or all</td></tr>
<tr><td></td><td>Filter ledgers</td><td>Filter by fiscal years</td></tr>
<tr><td></td><td>View ledger</td><td>Click on ledger to view:
Name
Abbreviation
Status
Fiscal Year
List of associated funds</td></tr>
<tr><td></td><td>Create ledger</td><td>Click “New” button to create additional ledger with:
Name
Abbreviation
Status pick list:
Active
Inactive
Pending
Description
Add any number of fiscal years</td></tr>
<tr><td></td><td>Edit ledger</td><td>Click edit button to modify ledger’s:
Name
Abbreviation
Status pick list:
Active</td></tr>
</table>

		○ Inactive ○ Pending ● Description ● Add or remove any number of fiscal years
	Delete ledger	D.N.E.
	Settings	Ledger permissions: ● View only, create, update, delete or all
Finances	Search Fiscal Years	Search by: ● All ● Amount ● Notes ● Timestamps ● Tags
	Filter Fiscal Years	No Filtering
	View Fiscal Years	Click on fiscal year to view: ● Name ● Abbreviation ● Description ● Period begin date ● Period end date
	Create Fiscal Years	Click “New” button to add a fiscal year with: ● Name ● Abbreviation ● Description ● Period begin date ● Period end date
	Edit Fiscal Years	Press edit button to modify: ● Name ● Abbreviation ● Description ● Period begin date ● Period end date
	Delete Fiscal Years	Press “Remove” button when editing fiscal year to delete fiscal year.
	Settings	Fiscal year permissions: ● View only, create, update, delete or all

C. Acquisition work units

Work teams under active construction

Application	Feature set	Feature details
Settings	Configure	● Select acquisitions units in Settings

	acquisitions teams	• Press “New” button • Enter Name • Add Members

D. **Orders**

Orders in FOLIO is where orders and order lines are managed within the library. The following features are currently supported.

Application	Feature set	Feature details
Orders	Search by	• Keyword • Date created • Date ordered • PO Number

	Filter by	• Status
		    o Open
		    o Closed
		    o Pending
		• Approved (yes/no)
		• Assigned to (popup)
		• Created by (popup)
		• Date created range
		• Date ordered range
		• Order type
		    o One-time
		    o Ongoing
		• Vendor (popup)
		• Reason for closure (popup)
		• Re-encumber (yes/no)
		• Renewal date range
		• Manual renewal (yes/no)
		• Renewal review period

	View list	Displays following columns • PO number • Vendor code • Status • Order type • Last updated • Acquisition unit • assigned to
	Sort by	PO number (ascending/descending)
	View orders	Click an order to see: Purchase Order • PO number • Vendor

<table>
<tr>
<td></td>
<td></td>
<td>

Created by
Created on
Assigned to
Bill to
Ship to
Manual
Re-encumber
Order type
Note
Last updated

Renewal information

Renewal interval
Renewal date
Review period
Manual renewal flag

PO Summary

Total units
Approved flag
Total estimated price
Workflow status

Related invoices list
PO lines

POL number
Title
Product ID
Vendor reference number
Fund code

</td>
</tr>
<tr>
<td></td>
<td>Create new order</td>
<td>
Click “New” button to create:

Select order template
Select prefix
PO number (auto assigned)
Select suffix
Select vendor
Created by (auto-populated)
Created on (auto-populated)
Assigned to (select from FOLIO user database, includes ability to search users)
Manual flag set
Re-encumber flag set
Select order type

One time
Ongoing

Select Bill to
Bill to Address (auto populated)
Select Ship to
Ship to Address (auto populated)
Add an unlimited number of notes
Delete notes

PO Summary

Total units (auto calculated)
Total estimated price (auto calculated)
Approved flag
Workflow status pick list

Closed
Open

</td>
</tr>
</table>

		○ Pending
	Edit order	Click edit to modify the above
	Delete order	D.N.E.
	Close order	When viewing PO, Press “Close order” button
	Add PO line	When viewing PO, press “Add PO Line” button to add a PO line
	Order templates	New order template (in FOLIO settings) ● Template name ● Code ● Description ● PO information ○ Prefix (pick list) ○ Suffix (pick list) ○ Vendor (pick list) ○ Assigned to (multi pick list) ○ Bill to (pick list) ○ Ship to (pick list) ○ Order type (pick list) ○ Manual (checkbox) ○ Re-encumber (checkbox) ● Notes - add and delete as many as are needed ● PO summary ○ Approved (checkbox) ● Item details ○ Title (search & select) ○ Instance ID ○ Receiving note ○ Subscription from & to dates ○ Subscription interval ○ Publication date ○ Publisher ○ Edition ○ Add/delete [1..n) contributor & contributer types (pick list) ○ Add/delete [1..n) contributor types (pick list) ○ Description ● PO line details ○ Acquisition method (pick list) ○ Order format (pick list) ○ Receipt date ○ Doner ○ Payment status (pick list) ○ Receipt status (pick list) ○ Selector ○ Cancellation restriction checkbox ○ Rush checkbox ○ Collection checkbox ○ Checkin items checkbox ○ Requester ○ Cancellation description ○ Line description ● Cost details ○ Currency (pick list) ○ List unit price? ○ Quantity physical? ○ Unit price of electronic?

<table>
<tr><td></td><td></td><td>Quantity electronic?
Estimated price (calculated)?
Addition cost
Discount
Vendor
Vendor ref number
Vendor ref type (pick list)
Account number (pick list)
Note from vendor
Instructions to vendor
Fund distribution - Press add button to add [1..n) funds
Fund ID (pick list)
Percent
code
amount
Delete fund button
Location - press “add location” button to add [1..n) locations
Name/code (pick list)
Quantity physical
Quantity electronic
Delete location</td></tr>
<tr><td></td><td>Settings</td><td>Order permissions
View only, create, update, delete or all
Create, edit & delete order categories
Create order template
Add closing order reasons
Inventory interactions
Electronic default (pick list)
Instance, holding, item
Instance, holding
Instance
None
PO order lines limit [1...n)
PO number:
Allow user to edit
Create and save prefixes
Create and save suffixes</td></tr>
<tr><td>Order lines</td><td>Search</td><td>Search by:
Keyword
Contributor
PO line number
Product ID
Requester
Title
Publisher
Vendor account
Vendor reference number
Selector
Volumes</td></tr>
<tr><td></td><td>Filter</td><td>Filter by:
Receipt status
Awaiting receipt
Canceled
Fully received</td></tr>
</table>

		○ Partially received ○ Pending ○ Receipt not required ● Payment status ○ Awaiting payment ○ Cancelled ○ Fully paid ○ Partially paid ○ Payment not required ○ Pending ● Acquisition method ○ Approval plan ○ DDA ○ Depository ○ EBA (Evidence based acquisition) ○ Exchange ○ Gift ○ Purchase at vendor system ○ Purchase ○ Technical ● Location (pick list) ● Fund code (pick list) ● Order format ○ Electronic resource ○ Physical resource ○ P/E mix ○ Other ● Material type, electronic (pick list) ● Material type, physical (pick list) ● Date created (from/to) ● Vendor (pick list) ● Source ○ User ○ API ○ EDI ○ MARC ● Collection (yes/no) ● Rush ● Access provider (pick list) ● Activated ● Expected activation (from/to) ● Trial ● Subscription (from/to) ? ● Actual receipt date (from/to) ● Expected receipt date (from/to) ● Receipt due (from/to) ● Claim ● Claim grace? ● Claim sent (from/to)
	Sort	Sort by PO number
	View	Click to view: ● Item details ○ Title ○ Receiving note ○ Subscription from & to

		○ Subscription interval ○ Publication date ○ Publisher ○ Edition ○ Product ID ○ Product ID type ○ Description ● PO order line ○ POL number ○ Acquisition method ○ Order format ○ Created on ○ Receipt date ○ Source ○ Doner ○ Payment status ○ Receipt status ○ Selector ○ Requester ○ Cancellation restriction ○ Rush ○ Collection ○ Checkin items checkbox ○ Cancellation description ○ Line description ● Cost details ○ List unit price ○ Currency ○ Quantity physical ○ Additional cost ○ Unit price of electronic ○ Discount ○ Quantity electronic ○ Estimated price ● Vendor ○ Vendor ref number ○ Vendor ref type ○ Instructions to vendor ○ Account number ○ Note from vendor ● Fund distribution ○ Fund ID ○ Percent ○ Fund code ○ Amount ● Other resource details ○ Material supplier ○ Receipt due ○ Expected receipt date ○ Create inventory ○ Material type ● Related invoices list ● Location ○ Name (code) ○ Quantity physical

		○ Quantity electronic
	Check-in items	Option 1: Orders view Filter open orders or search for any of the default attributes to view order on the search results. ● Click on the order and then click on the “Receive”button ● Click on checkboxes of titles to be received ● Click “Receive” button and enter: ○ Barcode (if not auto assigned) ○ Comments ○ Location from pop-up ○ Item status from pop-up ● Click “next” to process next selected item to be received ● Click “receive”when final item processed Option 2:Order lines view Filter open order items or search for any of the default attributes to view order items on the search results. ● Click on the order item and then click on the “Receive”button ● Click on checkboxes of titles to be received ● Click “Receive” button and enter: ○ Barcode (if not auto assigned) ○ Comments ○ Location from pop-up ○ Item status from pop-up ● Click “next” to process next selected item to be received ● Click “receive”when final item processed
	Check-in history	Once in the orders view, filter open orders or search for any of the default attributes to view order on the search results. ● Click on the order and then click on the “Receive”button ● Click the “Receiving history” button if not already selected ● Search box available if needed
	Re-open checked in item	Once in the orders view, filter open orders or search for any of the default attributes to view order on the search results. ● Click on the order and then click on the “Receive”button ● Click the “Receiving history” button if not already selected ● Search box available if needed ● Select title to be re-opened ● Click “Remove” button ● Confirm removal from history which places the item back in to “On-Order” state
	Close order	Once in the orders view, filter open orders or search for any of the default attributes to view order on the search results. ● Click on the order and then click on the “Close order”button ● Select the reason from the popup list: ○ Ceased ○ Complete ○ Transferred to another publisher ○ Merged with another title ○ Split into other titles ○ Lack of funds ○ Lack of use ○ Duplication ○ Unresponsive vendor

		○ Licensing terms (unacceptable) ○ Low quality ○ Unpreferred format ○ Error ○ Title won't be published this year ○ Title won't be published ○ Title is out of print ○ Title received as gift ● Enter notes if needed
	Settings	● Order permissions o View only, create, update, delete or all ● Closing purchase order reasons o Add: ▪ Press add button ▪ Enter reason o Edit: ▪ Press edit button for reason to be modified o Delete: ▪ Press "Remove" button for reason to be deleted

E. **Invoicing**

Invoicing in FOLIO is where invoices and invoice lines are managed within the library. The following features are currently supported.

Invoicing	Search by	● Keyword ● Voucher number ● Vendor invoice number ● PO number
	Filter by	● Vendor name (pop-up) ● Date created (from - to) ● Invoice date (from - to) ● Acquisitions unit (pop-up) ● Payment due (from - to) ● Payment method ○ Cash ○ Credit card/P-card ○ EFT ○ Deposit account ○ Physical check ○ Bank draft ○ Internal transfer ○ Other ● Approval date (from - to) ● Status ○ Open ○ Reviewed ○ Approved ○ Paid ○ Cancelled ● Source

<table>
<tr><td></td><td></td><td>User
API
EDI
MARC
Export to accounting
Yes/No</td></tr>
<tr><td></td><td>View list</td><td>Vendor invoice number
Vendor
Invoice date
Status
Total amount</td></tr>
<tr><td></td><td>Sort by</td><td>DNE</td></tr>
<tr><td></td><td>View invoice</td><td>Click on invoice search result to view in right most pane</td></tr>
<tr><td></td><td>Create new invoice</td><td>Click “New” button to enter:
Invoice information
Invoice date (pop-up)
Payment due (popup)
Terms
Status (pop-up)
Open
Reviewed
Approved
Paid
Cancelled
Approval date (auto fill, non-editable)
Acquisitions unit (auto fill, non-editable)
Subtotal (auto fill, non-editable)
Total adjustments (auto fill, non-editable)
Total amount (auto fill, non-editable)
Bill to name (pop-up)
Bill to address (auto fill, non-editable)
Note
Lock total check box
Adjustments:
Preset (pop-up)
Add/delete any number of adjustments
Description
Amount
“%” or “$”
Pro rate (pop-up)
By line
By amount
By quantity
Not prorated
Relation to total
In addition to
Included in
Separate from
Vendor information
Vendor invoice number</td></tr>
</table>

		○ Vendor name (pop-up) ○ Accounting code (pop-up) ● Extended information ○ FOLIO invoice number ○ Check subscription overlap (check box) ○ Currency (pop-up) ○ Payment method (pop-up) ■ Cash ■ Credit card/P-card ■ EFT ■ Deposit account ■ Physical check ■ Bank draft ■ Internal transfer ■ Other ● Save button
	Edit invoice	Click “Edit” button from pop-up: ● Invoice information ○ Invoice date (pop-up) ○ Payment due (popup) ○ Terms ○ Status (pop-up) ■ Open ■ Reviewed ■ Approved ■ Paid ■ Cancelled ○ Approval date (auto fill, non-editable) ○ Acquisitions unit (auto fill, non-editable) ○ Subtotal (auto fill, non-editable) ○ Total adjustments (auto fill, non-editable) ○ Total amount (auto fill, non-editable) ○ Bill to name (pop-up) ○ Bill to address (auto fill, non-editable) ○ Note ○ Lock total check box ● Adjustments: ○ Preset (pop-up) ○ Add/delete any number of adjustments ■ Description ■ Amount ■ “%” or “$” ■ Pro rate (pop-up) ● By line ● By amount ● By quantity ● Not prorated ■ Relation to total ● In addition to ● Included in ● Separate from ● Vendor information ○ Vendor invoice number

		○ Vendor name (pop-up) ○ Accounting code (pop-up) ● Extended information ○ FOLIO invoice number ○ Check subscription overlap (check box) ○ Currency (pop-up) ○ Payment method (pop-up) ■ Cash ■ Credit card/P-card ■ EFT ■ Deposit account ■ Physical check ■ Bank draft ■ Internal transfer ■ Other ● Save button
	Delete invoice	Select “Delete” from pop-up Select “Yes” or “Cancel” button
	Add invoice line	Press “Add” button in the invoice line section of invoice view Search by: ● Keyword ● Contributor ● PO number ● Product ID ● Requestor ● Title ● Publisher ● Vendor account ● Vendor reference number ● Donor ● Selector ● Volume Filter by: ● Receipt status ○ Awaiting receipt ○ Canceled ○ Fully received ○ Partially received ○ Pending ○ Receipt not required ● Payment status ○ Awaiting payment ○ Cancelled ○ Fully paid ○ Partially paid ○ Payment not required ○ Pending ● Acquisition method ○ Approval plan ○ DDA ○ Depository ○ Evidence based acquisitions (EBA)

<table>
<tr><td></td><td></td><td>
Exchange
Location(pop-up)
Fund code (pop-up)
Order format
Electronic
Physical
P/E mix
Other
Material type, electronic (pop-up)
Material type, physical (popup)
Date created (pop-up)
Vendor (pop-up)
Source (pop-up)
Access provider (pop-up)
Activated (Yes/No)
Expected activation (from - to)
Trial Yes/No()
Subscription from (pop-up)
Subscription to (pop-up)
Receipt date (pop-up)
Claim (Yes/No)
Claim grace
Claim sent (from - to)
Select from order line list
Sort by POL number
“Save” button</td></tr>
<tr><td></td><td>New Invoice line</td><td>Press “New” button in the invoice line section of the invoice view
Description
Invoice line number (auto-fill)
Invoice line status (auto-fill)
PO line ID (auto fill)
Subscription information
Subscription start date (pop-up)
Subscription end date (pop-up)
Quantity
Sub-total
Vendor reference number
Accounting code (auto fill)
Account number (pop-up)
Comment
Release encumbrance (check box)
Add any number of adjustments
“Save” button</td></tr>
<tr><td></td><td>Settings</td><td>
Invoicing permissions
View only, create, update, delete or all
Adjustments
Description
Type (pop-up)
Amount
Percent
Always show check box
Default amount</td></tr>
</table>

		o Pro rate (pop-up) ▪ By line ▪ By amount ▪ By quantity ▪ Not prorated o Relation to total (popup) ▪ In addition to ▪ Included in ▪ Seperate from

3. Inventory

Inventory is the FOLIO app where descriptive metadata from a variety of sources can be presented in a uniform, abstracted form for management of the collection regardless of the format or content rules used to describe a resource. The FOLIO Inventory interface is intended for staff discovery, not user-facing discovery and is the place in FOLIO to manage instance, holdings and item records for library materials. Some types of records for library resources may also be managed in other FOLIO apps.

Instance records may be derived from full bibliographic records (in MARC or other formats) and are intended to provide enough information for library staff to identify & select records in order to perform work on associated holdings and items. Instance records can also be in the native FOLIO format when full bibliographic description is not required. Instance records are not full descriptive catalog records. Editing an Instance record does not equate to editing a MARC record (or other metadata schema); source record editing occurs outside of Inventory.

Holdings records provide information needed, such as location, call number, and volumes owned, for staff to locate and manage library holdings. Holdings records may describe library holdings that are physical, electronic, or other formats. Holdings records may be created and edited either in FOLIO's MARC editor or Inventory record editor. If there is an underlying MFHD record, no editing of the holdings data is possible in Inventory.

An Item record provides the information needed to identify and track a single item or piece, such as barcode, availability, and material type. Item records are created and edited in Inventory.

Application	Feature set	Feature details
Inventory	Search by	● All (title, contributor, identifier) ● Title ● Barcode ● Instance ID ● Identifier o ISBN o ISSN

		• Contributor • Subject
	Filter by	• Language (pop up) • Resource type (all RDA content types covered) • Location
	View list	Columns: • Title • Contributor • Publishers • Relation (ex. multiparts or series)
	Sort by	• Title • Contributors • Publishers • Relation
	View Instance	• Title • Administrative data o HRID o Metadata source o Cataloged date • Title data: o Resource title o Index title o Series statement • Identifiers (unlimited list) o Resource identifier type o Identifier • Contributor (unlimited list) o Name type o Name o Type o Free text o Primary • Descriptive data o Publisher o Publisher role o Place of publication o Publication date • Physical description • Resource type term • Resource type code • Resource type source • Language • Publication frequency • Publication range • Instance notes • Electronic access o URL relationship o URI o Link text • Subject headings (unlimited list) • Classification (unlimited list) • Instance relationship (analytics and bound-with) • Add holdings • Add items

	Create new Instance	● New button ● Duplicate record button If either button pressed, Edit instance view is presented
	Edit Instance	● Administrative data ○ Suppress from discovery checkbox ○ Staff suppress checkbox ○ Previously held checkbox ○ Instance HRID ○ Metadata source ○ Cataloged date ○ Instance status term ○ Mode if issuance ○ Button to add any number of statistical codes via popup ○ Button to delete any statistical code ● Title data ○ Resource title ○ Alternative titles: Button to add and remove any number of alternative titles ○ Index title ○ Series statements ○ Button to add more series statements ● Identifiers, button to add any number of: ○ Identifier type (ISBN, ISSN, etc) ○ Identifier ○ Button to remove identifier ● Contributor - button to add any number of: ○ Name ○ Name type ○ Type ○ Type, free text ○ Primary button ○ Delete button ● Descriptive data ○ Button to add any number of; ■ Publisher ■ Publisher role ■ Place ■ Publication date ■ Button to delete publication ○ Editions - Button to add any number ○ Physical description- Button to add any number of: ■ Physical description ■ Delete button ○ Resource type popup ○ Formats - Button to add any number ○ Language - button to add/delete any number ■ Language popup ○ Publication frequency - button to add/delete any number ○ Publication range - button to add/delete any number ○ Instance notes - button to add/delete any number

		○ Electronic access - button to add any number
		    ■ Relationship popup
		    ■ URI
		    ■ Link text
		    ■ Material specified
		    ■ URL public note
		    ■ Delete button
		○ Subject - button to add any number
		○ Classification - button to add any number
		    ■ Classification identifier type
		    ■ Classification
		    ■ Delete button
		○ Instance relationship (analytics & bound-with)
		    ■ Parent relationship - button to add any number of:
		        ● Parent instance
		        ● Type of relation popup
		        ● Delete button
		    ■ Child relationship - button to add n
		        ● Child instance
		        ● Type of relation popup
		        ● Delete button
		○ Related instance
		    ■ In progress

	Delete Instance	Does not exist

	View Holdings	Appears when viewing the instance. Contains:
		● Location
		● Call number
		● View holdings button to open detailed view
		● Add item button
		● List containing:
		    ○ Item barcode (click to view item record)
		        ■ Copy barcode to clipboard button
		    ○ Status
		    ○ Material type
		● Add holdings button

	Create Holdings	“Add holdings” button provides view to edit:
		● Administrative data
		    ○ Suppress from discovery checkbox
		    ○ Holdings HRID
		    ○ Button to add/delete any number of former holdings IDs
		    ○ Holdings type popup
		    ○ Button to add/delete any number of statistical codes via popup
		● Location
		    ○ Permanent popup
		    ○ Temp popup
		    ○ Shelving order
		    ○ Shelving title
		    ○ Holdings call number
		        ■ Copy number
		        ■ Call number type (popup)
		        ■ Call number prefix

		■ Call number ■ Call number suffix ● Holdings details ○ Number of items ○ Add/delete unlimited ■ Holdings statements ■ Holdings statements notes ■ Delete button ○ Add/delete unlimited ■ Holdings statement for supplicants ■ Supplicants notes ■ Delete button ○ Add/Delete unlimited ■ Holdings statement for indexes ■ Holdings statement for indexes notes ■ delete button ● Holding notes (add/remove unlimited) ○ Note type popup ○ Note ○ Staff only check box ○ Delete button ● Acquisition ○ Acquisition method ○ Order format ○ Receipt status ● Electronic access (add/remove unlimited) ○ Relationship popup ○ URI ○ Link text ○ Materials specified ○ URL public note ○ Delete button ● Receiving history (add/remove unlimited) ○ Public display check box ○ Enumeration ○ Chronology ○ Delete
	Edit Holdings	Edit all fields listed above except for: ● Holdings HRID
	Delete Holdings	D.N.E.
	View Items	Items listed on instance pane. List displays: ● Item barcode (click takes user to item details) ● Copy to clipboard button ● Status ● Material type
	Create Items	“Add item” button: ● Administrative data ○ Suppress from discovery checkbox ○ Item HRID ○ Barcode ○ Accession number ○ Item identifier ○ Button to add/delete any number of former IDs ○ Button to add/delete any number of statistical codes via popup

<table>
<tr><td></td><td></td><td>

Item data

Material type popup
Copy number
Call number type popup
Call number prefix
Call number
Call number suffix
Number of pieces
Description of pieces

Enumeration data

Enumeration
Chronology
Volume
Add year, caption button (unlimited)

Year, caption
Delete button

Condition

Number of missing pieces
Missing pieces
Missing pieces date
Item damaged status popup
Item damaged date

Item notes (add/remove unlimited)

Note type popup
Note
Staff only check box
Delete button

Loan & availability

Permanent loan type popup
Temporary loan type popup
Status
Add check in/ check out button (unlimited)

Note type popup
Note
Staff only check box
Delete button

Location

Permanent popup
Temp popup

Electronic access (add/remove unlimited)

Relationship popup
URI
Link text
Materials specified
URL public note
Delete button

</td></tr>
<tr><td></td><td>Edit Items</td><td>Click on item barcode to edit any attached item</td></tr>
<tr><td></td><td>Delete Items</td><td>D.N.E.</td></tr>
<tr><td></td><td>Settings</td><td>Instances

Inventory permissions (D.N.E.)

View only, create, update, delete or all

Alternative title types (create, edit & delete)
Classification identifier types (create, edit & delete)
Contributor types (create, edit & delete)
Formats (create, edit & delete)

</td></tr>
</table>

		● Instance note types (create, edit & delete) ● Instance status types (create, edit & delete) ● Modes of issuance (create, edit & delete) ● Nature of content (create, edit & delete) ● Resource identifier types (create, edit & delete) ● Resource types (create, edit & delete) Holdings ● Holdings notes types (create, edit & delete) ● Holdings types (create, edit & delete) ● ILL policy (create, edit & delete) Items ● Item note types (create, edit & delete) ● Loan types (create, edit & delete) ● Material policy (create, edit & delete) Instances, holdings, items ● Statistical code types (create, edit & delete) ● Statistical codes (create, edit & delete) ● URL relationship (create, edit & delete) Holdings, items ● Call number types (create, edit & delete)

4. Agreements

FOLIO's agreements tie the license to the package and provide tracking of critical subscription information such as contacts, renewal and cancellation deadlines, usage data and more. FOLIO is unique in that it allows the library to choose a knowledgebase to manage e-resources. Currently in FOLIO the e-Holdings application makes use of EBSCO's knowledgebase and the e-resources feature in agreements can make use of GOKb currently updated and maintained by the GBV and HBZ in Germany. FOLIO's agreements interacts with either and possibly more in the future.

Application	Feature set	Feature details
Agreements	Search	● Text search (Find out what fields are indexed) ●
	Filter	Filter by: ● Status ○ Draft ○ Requested ○ In negotiation ○ Rejected ○ Active ○ Cancelled ● Renewal priority

		○ Renew ○ For review ○ Cancel ● Is perpetual (yes/no) ● Organization popup (often the publisher) ● Organization role popup ● Tags
	View result list	● Agreement name ● Status Can sort by agreement name
	View Agreement	Click on agreement in result list to view agreement details: ● Start date ● End date ● Status ● Vendor ● Name ● Description ● Cancellation deadline ● Renewal priority ● Is perpetual ● Internal contacts: ○ Name ○ Role ● Agreement lines: ○ Name ○ Provider ○ E-resource type ○ Count ○ Coverage ○ PO line ○ E-resources covered by this agreement: ■ Name ■ Platform ■ Package ■ Have access flag ■ Access start ■ Access end ■ Coverage ■ Export button ● License Information: ○ Controlling license ○ Type ○ Status ○ Start date ○ End date ○ Licensor ○ Links to external license ○ Link to internally stored license ● License and business terms ○ Authorised user definition ○ Number of concurrent users allowed ○ Walk in access permission

<table>
<tr>
<td></td>
<td></td>
<td>

On-campus/network restrictions
Electronic ILL permission
Secure electronic ILL
Print ILL
Storage of e-copies in secure network
Use in print course packs
Digital copies
Print copies

Organizations

Organization name
Interface name
Username
Password
Interface type
Notes

E-resource - agreement lines

not working at the time

Supplementary information

not working at the time

Associated agreements
Notes

Date
Updated by
Title

</td>
</tr>
<tr>
<td></td>
<td>New agreement</td>
<td>Click on new button above result list to create new agreement:

Name
Description
Start date
End date
Status
Vendor
Cancellation deadline
Renewal priority
Is perpetual
Internal contacts button (add unlimited):

Name
Role
Delete

Agreement lines
License Information:

General notes about the agreement license
Add license to agreement button (unlimited in number & popup list)

Type
Status
Start date
End date
Licensor
Delete button
Status popup
Notes

</td>
</tr>
</table>

		- Add external license to agreement button (unlimited in number and popup list) - Name - Note - Physical location - URL - File selection (for upload) - Organizations - Add organization button - Search by name - Organization name (from organizations application) - Role (popup list) - Delete button - Supplementary information - Name - Note - Physical location - URL - Choose file button
	Edit agreement	See “New agreement” above
	Delete agreement	D.N.E.
	Settings	- Hide internal knowledgebase (select if not using GOKb) - Add, edit or delete from Organization roles

5. License management

Some interesting text about licenses goes here….

Application	Feature set	Feature details
Licenses	Search	Name
	Filter	- Status - In negotiation - Not yet active - Active - Rejected - Expired - Type - Local - Consortial - National - Alliance - Organizations - Select an organization (popup)

		● Organization role ○ Select a role (popup)
	View result list	● Name (sort by) ● Type ● Status
	View License	Details: ● Name ● Description ● Type ● Status ● Start date ● End date ● Licensor ● Internal contacts ○ Name ○ Role ● Organizations ○ Name ○ Role ● Core documents (any number of) ○ Name ○ Note ○ Type (physical location, URL, etc.) ○ Reference (location or URL) ● Terms ○ Authorised user definition ○ Number of concurrent users allowed ○ Walk in access permission ○ Access restricted to on-campus/campus network ○ Electronic ILL ○ Secure electronic ILL ○ Print ILL ○ Storage of electronic copies on secure network ○ Use in electronic course packs ○ Making digital copies ○ Making print copies ○ Sharing for Scholarly use ○ Text and data mining ○ Subject to APC discount or subscription cost offsets ○ Post cancellation terms ● Amendments(any number of) ○ Name ○ Status ○ Start date ○ End date ● Supplementary information (any number of links or documents) ○ Name ○ Note

		○ Type ○ reference/location/url ● Agreements linked to this license
	New license	See view license above
	Edit license	See view license above
	Delete license	D.N.E.
	Add Amendment	Any number of amendments can be added ● Name ● Status (popup) ● Start date ● End date ● Open ended checkbox ● Description ● Core documents ○ Name ○ Note ○ Physical location ○ URL ○ File selection button ● Terms ○ See terms in license details above ● Supplementary information ○ See supplementary information in license details above
	Settings	None

6. Electronic holdings/package management

FOLIO is unique in that it currently supports multiple knowledgebases and multiple applications to interact with those knowledgebases. The library can choose the knowledgebase that best suits their needs.

6.a. FOLIO e-resource management via GOKb

FOLIO E-resource management via the E-resources feature in the agreements application that makes use of GOKb natively. Note that is a library chooses to use GOKb, this feature must be used for e-holdings management.

Application	Feature set	Feature details
Agreements	E-resources	Button available to enter feature set if not disabled in settings

	Search	Name (check if anything other fields are searched) ?
	Filter	● Type ○ Journal ○ Book ● Is package ○ Yes/No
	View result list	Click search to view: ● Name (sortable) ● Type ● ISBN ● ISSN (online) ● ISSN (print)
	View details	Click on a search result row to view: ● Title/name ● E-resource type ● Publisher ● ISSN ● ZDB ID ● List of agreements ● Options for acquiring e-resource ○ Source ○ Parent package ○ Platform ○ Acquisition method ○ E-resource basket ○ Add additional titles button ○ Add additional packages button ● Notes
	Settings	D.N.E.
	Import	?
Local KB Admin	Harvest	For libraries using GOKb, this tool allows a library to setup and configure harvesting jobs
	Search	Search by job name
	Filter	Filter by: ● Running status ○ Queued ○ In progress ○ Ended ● Result ○ Success ○ Partial Success ○ Failure ○ Interrupted ● Job type ○ Harvester
	View jobs	Execute search to view

		• Job name • ?
	View jobs detail	?
	Edit Job	?
	Create new job	?
	Delete job	?
	Settings	?

6.b. FOLIO Local KB Admin (GOKb)

Someone for RM SIG with more GOKb knowledge should fill this in

Application	Feature set	Feature details

6.c. FOLIO e-resource management via the eHoldings application

FOLIO E-resource management via the eHoldings application makes use of EBSCO HoldingsIQ API to gain access to the EBSCO knowledgebase. This provides instant 2 way communication between the Knowledgebase and all related services such as the link resolver and discovery service and takes advantage of auto-population for all package purchases. Any changes, additions or removals from FOLIO's e-Holdings automatically appear instantly in EBSCO's holdings and linking management service (HLM) and and changes in HLM automatically appear in FOLIO's e-Holdings. If a library chooses to use a commercially provided knowledgebase, the e-holdings app must be used to manage e-holdings.

Application	Feature set	Feature details
e-Holdings	Providers	Search and maintain holdings by provider
	Search providers	Search by provider name
	Filter providers	Filter by Tags: ● Tag (popup) ● Search by tags only checkbox
	Sort providers	Sort search results b: ● Relevance ● Provider
	Search results	Results display: ● Provider ● Number of packages by provider ● Number of packages selected or subscribed to

	View provider details	Click on a search result to see detail pane containing:
		● Provider name
		● Tags (and ability to select tags from popup)
		● Provider information
		  ○ Packages selected
		  ○ Total packages by provider
		● Provider settings
		  ○ Proxy
		● Notes
		  ○ Date of note
		  ○ Updated by
		  ○ Note title
		  ○ Click on note to view details and edit
		  ○ Assign/unassign note button
		  ○ New note button
		● Packages
		  ○ Records found (number)
		  ○ List of all packages with:
		    ■ Package name
		    ■ Selected or not
		    ■ Number of titles in package
		    ■ Number of titles selected in package
		    ■ Search package list button
		      ● Search by package name
		      ● Filter by tags (popup)
		        ○ Tags only checkbox
		      ● Sort options (popup)
		        ○ Relevance
		        ○ Package
		      ● Filter by selection status (popup)
		        ○ All
		        ○ Selected

		○ Not selected ○ Ordered through EBSCO ● Filter by content type (popup) ○ All ○ Aggregated full text ○ Abstract & index ○ E-Book ○ E-Journal ○ Print ○ Online reference ○ Unknown ● Click on any package to view details, add to holdings or edit. More details below in "Edit packages" section.
	Edit provider	Click "edit" button to select proxy from popup.
	Search Packages	Search package name
	Filter packages	Filter by: ● Tags ○ Tags (select from popup) ○ Search by tags only checkbox ● Selection status ○ All ○ Selected ○ Not selected ○ Ordered through EBSCO ● Content type ○ All ○ Aggregated full text ○ Abstract & index ○ E-Book ○ E-Journal ○ Print ○ Online reference ○ Unknown
	Sort packages	Sort results by: ● Relevance ● Package
	View search results	Results display: ● Package title ● Provider ● Selected or not (Subscribed to) ● Hidden (from discovery) or not
	View package details	Click on search result to view package details: ● Package name ● Selected tags

		● Status (selected or not)
		● Package information
		    ○ Provider(link to organization record)
		    ○ Content type
		    ○ Package type
		    ○ Titles selected
		    ○ Total titles
		● Package settings
		    ○ Show titles to patrons
		    ○ Automatically select new titles
		    ○ Proxy
		    ○ Provider token
		● Coverage settings for custom coverage dates
		● Agreements
		    ○ Add button (see agreements section for details)
		    ○ New button (see agreements section for details)
		    ○ Start date
		    ○ Status
		    ○ Agreement name
		● Notes
		    ○ Date of note
		    ○ Updated by
		    ○ Note title
		    ○ Click on note to view details and edit
		    ○ Assign/unassign note button
		    ○ New note button
		● Package Titles
		    ○ Records found (number)
		    ○ Search button (search the current list of titles)
		    ○ Title list
		        ■ Title
		        ■ Selected (or not)
		        ■ Hidden (or not)
		    ○ Click on a package title for a full page view that allows a user to:
		        ■ Select or deselect the title
		        ■ Set tags
		        ■ Add agreements
		        ■ Add notes

	Select package	If the library subscribes or has access to the package, the title dropdown can be clicked to access the “Select/deselect” option to select or deselect the package and all it’s titles.
	Edit package details	Click the edit button to edit package details: ● Show titles to patrons checkbox ● Automatically select new titles checkbox ● Select proxy ● Set the package token ● Set coverage dates ○ Start date (date picker)

		○ End date (date picker) ○ Delete date button
	New package	Create a new custom package by clicking the “New” button
	Import	Titles and packages can be imported and matched from other ERM/ILS systems via EBSCO’s HLM
	Export	Library holdings can be exported via KBART in EBSCO’s HLM
	Settings	Knowledgebase settings ● API endpoint (popup) ● Customer ID ● API key Root Proxy ● Root proxy server (popup)

7. User Management

The user application in FOLIO is used to manage staff, faculty and students. All users in FOLIO are stored in the same data file. FOLIO does not make any distinctions between the different types of users other than the rights they are given in the system. So certain librarians might have full rights to all parts of FOLIO while others might only have partial access. Students might have no access at all with only the ability to borrow items. Student helpers might be given access to a subset of functionality in circulation. Currently FOLIO does offer a command line loading tool and also offers authentication via SAML such as Shibboleth and Open Athens.

Application	Feature set	Feature details
Users	User Management	
	Search	Search by: ● First name ● Last name ● email ● State/Providence/Region Reset button clears search and all filters
	Filter	Filter results by: ● Status ○ Active ○ Inactive ● Patron group ○ Admin

		○ Faculty ○ Graduate ○ Institutional ○ Staff ○ Undergrad ○ Vendor
	Search results	View results by: ● Status ● Name (ascending and descending sort) - last, first ● Barcode ● Patron group
	View details	Click on a patron to view: ● User information ○ Surname, first ○ Last name ○ First name ○ Middle name ○ Barcode ○ Patron group ○ Status ○ Expiration date ● Patron blocks ○ Type ○ Description ○ Blocked actions ● Extended information ○ Date enrolled ○ Birth date ○ FOLIO UUID ○ External system ID ○ Username ● Contact information ○ email ○ Phone ○ Mobile phone ○ Preferred contact ○ Addresses ● Proxy & Sponsors ○ List of people user is a sponsor for ○ List of people user is a sponsor of ● Fees & fines ○ Count of open fees/fines and the total monetary amount. Links to a details view ○ Count of closed fees/fine. Links to details page ○ Link to all fees & fines ○ “Create fee/fines” button to manually create a fine ● Loans ○ Number of open loans. Link to details view ○ Number of closed loans. Link to details view ● Requests

<table>
<tr><td></td><td></td><td><li style="list-style:none">
Number of open requests. Links to details
Number of closed requests. Links to details
“Create request” button open request creation page
User permissions
Lists all rights that the user has to features and data within FOLIO
Service points
Preferred service point for user</td></tr>
<tr><td></td><td>New user</td><td>Press “New” button to add a new user with:
User information
Last name
First name
Middle name
Barcode
Patron group (popup)
Status (popup)
Expiration date (date picker)
Extended information
Date enrolled
External system ID
Birth date
Username
FOLIO password
Show/Hide password button
Contact information
Email
Phone
Mobile phone
Preferred contact method (popup)
Add any number of addresses (button) with:
Address type popup
Address line 1
Address line 2
City
State/Province/Region
Zip/postal code
Country (popup)
Delete address button</td></tr>
<tr><td></td><td>Edit user</td><td>User information
Last name
First name
Middle name
Barcode
Patron group (popup)
Status (popup)
Expiration date (date picker)
Extended information
Date enrolled
External system ID
Birth date
FOLIO UUID</td></tr>
</table>

		○ Username ○ Link to send user user “create email password” ● Contact information ○ Email ○ Phone ○ Mobile phone ○ Preferred contact method (popup) ● Add any number of addresses (button) with: ○ Address type popup ○ Address line 1 ○ Address line 2 ○ City ○ State/Province/Region ○ Zip/postal code ○ Country (popup) ○ Delete address button ● Proxy/Sponsor ○ List of people user is a sponsor of ○ Add Proxy button that provides entry for: ■ User search to select a user in FOLIO ■ Relationship status ■ Expiration date (date picker) ■ Proxy can request for the sponsor (yes/no) ■ Notifications sent to proxy/sponsor ■ Delete button ○ Add Sponsor button that provide entry for: ■ User search to select a user in FOLIO ■ Relationship status ■ Expiration date (date picker) ■ Proxy can request for the sponsor (yes/no) ■ Notifications sent to proxy/sponsor ■ Delete button ● User permissions ○ List of all assigned permissions with ability to remove any permission desired ○ Add permission button ○ Add all permissions button ● Service points ○ Button to add service points ○ Pressing button presents the user with a list of library defined service points ○ Service point preference popup ○ List of service points with ability to remove any service point as needed
	Delete user	D.N.E.

<table>
<tr><td></td><td>Tag user</td><td>Press tag button to add a tag from:
Popup list of previously created tags
Enter a new tag that will appear in the popup from that point on</td></tr>
<tr><td></td><td>Reports</td><td>Overdue loans report in CSV format for export</td></tr>
<tr><td></td><td>Import</td><td>Command line tool that provides the following;
?</td></tr>
<tr><td></td><td>User settings</td><td>Permission sets (create sets as needed)
Patron groups (create groups as needed)
Name
Description
Last updated
Number of users
Edit button
Delete button
New button
Address types (create types as needed)
Address type
Description
Last updated
Number of addresses
Delete button
Edit button
new button
Profile pictures
Checkbox to enable (note that patron pictures are not yet operational)
Fee/Fine (not yet operational)
Owners (fee / fine owners)
Owner
Description
Associated service point
Edit button
delete button
new button
Manual charges
Fee/fine owner popup
Default charge notice
Default action notice
Edit button for defaults above
List of manual fee/fine types
Fee/fine type
Default amount
Charge notice
Action notice
Edit button
Delete button
New button
Waive reasons
Reason
Description</td></tr>
</table>

<table>
<tr><td></td><td></td><td>Last updated (date and person)
Edit button
Delete button
New button
Payment methods
Fee/fine owner
List of payment methods
Name
Refund method allowed (yes/no)
last updated (date and person)
Edit button
Delete button
New button
Refund reasons
List of reasons
Name
Description
Last updated (date and person)
Edit button
Delete button
New button
Comment required
Require comment when fee/fine fully/partially paid (yes/no)
Require comment when fee/fine fully/partially waived (yes/no)
Require comment when fee/fine fully/partially refunded (yes/no)
Require comment when fee/fine fully/partially transferred (yes/no)
Transfer accounts
Fee/fine owner popup
Account name
Description
Last updated (date & person)
Edit button
Delete button
New button</td></tr>
<tr><td>Patron blocks</td><td>Add patron block</td><td>Click “Create block” button to add a block.
Display description
Staff only description
Message to patron
Expiration date (date picker)
Block actions
Borrowing checkbox
Renewals checkbox
Request checkbox</td></tr>
<tr><td></td><td>Remove patron block</td><td>Click on block to edit page that provides the delete button</td></tr>
<tr><td></td><td>Edit patron block</td><td>Click on block to edit fields listed above</td></tr>
</table>

	Patron block settings	D.N.E.

8. Resource Access (Circulation)

Will add a description later.

8a. Check out

Application	Feature set	Feature details
Check out	Scan barcode	Any scanner will work if it provides keyboard input (almost all do) or enter barcode by hand. FOLIO can be configured to look up by: ● Barcode ● External system ID ● FOLIO record number ● Username
	Patron lookup	If patron cannot be scanned, click “Patron look up” link for search box to appear. Search by: Search by: ● First name ● Last name ● email ● State/Providence/Region Reset button clears search and all filters. Filter by: ● Status ○ Active ○ Inactive ● Patron group ○ Faculty ○ Graduate ○ Staff ○ Undergrad View results by: ● Status (active or not) ● Name ● Barcode ● Patron group ● Username ● Email Click on a record to select patron
	Audio alerts	Audible alert on successful scan (can be enabled and diabled)
	View patron	Once scanned, FOLIO displays:

		● Surname, first ● Barcode ● Patron group ● Status ● Expiration date ● Number of open loans (links to actual list) ● Number of open requests (links to actual list) ● FIne & fees owed ● Patron blocks (links to actual blocks in patro record view)
	Blocks	Manual and automatic blocks appear upon retrieving and displaying patron record. Items awaiting pickup or any manually created blocks are good examples of this. The user needs to acknowledge the block to move forward in the workflow.
	Item scan	Scan or enter item barcode by hand and press the enter button or key. Total items scanned displays the count of items scanned and item details are displayed.
	View item details	Once barcode scanned, the following appear for each item scanned: ● Barcode ● Title ● Loan policy ● Due date ● Due time ● Ellipsis menu ○ Item details ○ Loan details ○ Loan policy ○ Change due date
	End session button	Plessing this button clears the screen of all details related to the last round of patron circulation transactions.
	Service points	Current service point can be changed by clicking on the login user icon on the upper left of the app menu bar. All check out transactions are created based on the current service point.
Settings	Loan policies	Loan policies: ● Clicking on "Settings:Loan policies" displays list of policies View policy details ● Clicking on a policy reveals loan policy details in pane New - pressing "New" creates a new loan policy with: ● Policy name ● Policy description ● Loanable checkbox ● Loan profile ○ Fixed

<table>
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<td>

Rolling
Closed library due date management

Keep the current due date
Move to the end of the previous day
Move to the end of the following day

Grace period (numeric)
Grace period interval

Minute
Hour
Day
Week
Month

Renewals

Renewable checkbox
Unlimited renewable checkbox
Number of renewals allowed
Renewal period different from original loan
Select schedule

Recalls

Recall return interval (numeric)

Minutes
Hours
Days
Weeks
Months

Minimum guaranteed loan period for recalled items (numeric)

Minutes
Hours
Days
Weeks
Months

Holds

Alternate loan period at checkout for items with an active, pending hold request (numeric)

Minutes
Hours
Days
Weeks
Months

Allow renewal of items with an active, pending hold request (checkbox)
Alternate loan period at renewal for items with an active, pending hold request (numeric)

Minutes
Hours
Days
Weeks
Months

Edit loan policy button - Edits any of the above fields
</td>
</tr>
</table>

		Duplicate button - Duplicates an existing loan policy that can be edited Delete button - Deletes a policy ● ? What happens to any items that were tied to the deleted policy ?
Settings	Fixed due date schedules	New ● Fixed due date schedule name ● Description ● New Date range button adds as many date ranges as needed. Each range contains: ○ From date (popup) ○ To date (popup) ○ Due date (popup) ○ Delete button
Settings	Other settings	● Patron IDs for checkout scanning: ○ Barcode checkbox ○ External ID checkbox ○ FOLIO record number checkbox ○ Username ● Automatically end checkout session after period of inactivity checkbox ○ Number of minutes until ending checkout session (numeric) ● Enable audio alerts checkbox
Settings	Patron notice policies	
Settings	Patron notice templates	

8b. Check in

Application	Feature set	Feature details
Check in	Scan item	Scan the item barcode (or RFID). Scanner must provide keyboard input or enter by hand
	View item	Once scanned and assuming no errors, a list is displayed with the following: ● Time returned ● Title ● Barcode ● Call number ● Location ● Status ● Ellipsis menu ○ Loan details

		○ Patron details ○ Item Details ○ New fine/fee
	New fine/fee	Displays: ● Patron name ● Barcode ● Fee/fine owner popup ● Fee/fine type popup ● Fee/fine amount ● Item barcode ● Title ● Item status ● Call number ● Location ● Notes for staff Buttons ● “Cancel” button ● “Charge” button ● “Charge & pay now” button
	Back date & time	Process as day button ● Defaults to today ● Clicking button provides: ○ Date entry field ○ Calendar popup button ○ Erase selection button Process as time button ● Defaults to current time ● Clicking button provides: ○ Time entry field ○ Time popup button ○ Erase selection button
	Anonymization	If FOLIO is configured to anonymize loan data at item return, the anonymization occurs immediately upon return if no open fines or fees are associated with that item.
	End session	End session button clears the screen and borrower
	Blocks	All manual and automatic blocks appear immediately after scanning the barcode of the item. The blocking message must be acknowledged prior to continuing with the workflow.
	Service points	Current service point can be changed by clicking on the login user icon on the upper left of the app menu bar. All check in transactions are created based on the current service point. If an item is returned from another service point that does not match the current service point, FOLIO will display a block alerting the user that the item must be transferred to the correct service point. The user can print a slip to send

		the item to the proper service point. The item status automatically changes to "In-transit" until the item is checked into the correct service point.
	Settings	

8.c. Requests

Application	Feature set	Feature details
Requests	Search	Search by: ● Title ● Item barcode ● Requestor barcode
	Filter	Filter by: ● Holds ● Pages ● Recalls ● Closed - Cancelled ● Closed - Filled ● Closed - Unfilled ● Closed - Pickup expired ● Open - Awaiting pickup ● Open - In-transit ● Open - Not yet filled
	View results	Press "Search" button to execute search or select a filter to view results: ● Request date ● Title ● Item bar code ● Type ● Request status ● Position ● Requester ● Requester barcode ● Proxy
	Sort results	Click on column header to sort by: ● Request date ● Title ● Item bar code ● Type ● Request status ● Requester ● Requester barcode ● Proxy Clicking the second time reverses the sort

	View details	Click on a search result to view details: ● Tags ● Item information ○ Item barcode ○ Title ○ Contributor names ○ Shelving location ○ Call number ○ Enumeration ○ Copy ○ Item status ○ Current due date ○ Requests on item ● Request information ○ Request type ○ Request status ○ Request expiration date ○ Hold shelf expiration date ○ Position in queue ● Requester information ○ Requester name ○ Requester barcode ○ Requester patron group ○ Fulfillment preference ○ Pickup service point
	Edit record	Click edit button: ● Item information ○ Item barcode (link to record) ○ Title ○ Contributor names ○ Shelving location ○ Call number ○ Enumeration ○ Copy ○ Item status ○ Current due date ○ Requests on item ● Request information ○ Date of last record update ○ Request type ○ Request status ○ Request expiration date (popup) ○ Hold shelf expiration date ○ Position in queue ● Requester information ○ Requester name ○ Requester barcode ○ Requester patron group ○ Fulfillment preference (popup) ○ Pickup service point (popup) ● Close request button ● Update request button ● Delete request button

		● Cancel edit button

	New record	Press “New” button on results list to create new request
		● Item information
		    ○ Scan or enter barcode and the following are auto filled:
		        ■ Item barcode (link to record)
		        ■ Title
		        ■ Contributor names
		        ■ Shelving location
		        ■ Call number
		        ■ Enumeration
		        ■ Copy
		        ■ Item status
		        ■ Current due date
		        ■ Requests on itemcount (link to requests)
		● Request information
		    ○ Request type (automatically set based on item availability)
		    ○ Request expiration date (popup)
		● Requester information
		    ○ Scan or enter barcode
		    ○ Requester lookup (popup) auto fills:
		        ■ Name
		        ■ Barcode
		        ■ Requester patron group
		        ■ Fulfillment preference (popup)
		        ■ Pickup service point (popup)
		● “New request” button to save
		● Cancel editing button

	Cancel request	Press “Cancel request” button and user must select ● Reason for cancellation (popup) ● Additional information for patron (optional text field) ● “Confirm” button to cancel request ● “Back” button to not cancel
	Duplicate request	Press “Duplicate request” button copies existing request and allows the user to change the following: ● Item barcode ● Request type (popup) ● Request expiration date (popup) ● Requestor (barcode or popup) ● Fulfillment preference ● Pickup service point ● Cancel editing button ● New request button to save
	Move request	Press “Move request” button to move request to another item if one exists for the instance. If an additional item exists, a popup appears with a list of additional copies to select from.

		- The list contains: - Barcode - Item status - Request queue location - Location - Material type - Loan type (can it circulate or not) - Clicking on a copy in the list will move the request to that item. - Clicking the “Cancel” button cancels the operation
	Export to CSV	Press “Export to CSV” under the requests menu to export search results (based on search and currently set filters) to a CSV file.
	Hold shelf clearance report	Press “Hold shelf clearance report” under the requests menu to export list of expired requests to a CSV file to identify items that should be removed from the hold shelf.
Settings	Circulation: Request cancellation reasons	Library has ability to: - View request cancellation reasons - List displays: - Cancel reason - Description (internal) - Description (public) - Actions (edit, delete) - Create new request cancellation reasons by pressing “New” button - Cancel reason - Description (internal) - Description (public) - Save button - Cancel button - Edit cancellation reasons - Delete cancellation reasons
	Circulation: Request policies	List of request policies appear. User can click on a policy to display details: - Request policy name - Request policy description - Request types allowed Press “Edit” button to edit - Request policy name - Request policy description - Request types allowed - Hold checkbox - Page checkbox - Recall checkbox “Save” button - Cancel button - Delete menu option - Cancel menu option Press “New” button to create new policy

<table>
<tr><td></td><td></td><td>

Request policy name
Request policy description
Request types allowed

Hold checkbox
Page checkbox
Recall checkbox
“Save” button
Cancel button
Delete menu option
Cancel menu option

</td></tr>
<tr><td></td><td>Circulation:
Staff slips</td><td>
List of staff slips appear.
User can click on a slip to view details:

Name
Active or not
Description
Preview button to view the actual slip as it would print

User can click “Edit” button

Active checkbox
Description text field
Preview button
Message editor that allows the text to be created or modified

Text entry
Bold
Italix
Underline
Bulleted list
Indent
Text size
Left, right & center justify
Link (URL)
Tokens

Item details

title
Primary contributor
All contributors
Barcode
Call number
Call number prefix
Call number suffix
Copy
Enumeration
Volume
Chronology
Year
Loan type
Material type
Number of pieces
Description of pieces
Last scanned service point
Last scanned date
From service point

</td></tr>
</table>

		● To Service point ■ Effective location ● Institution ● Campus ● Library ● Specific location ■ Name of slip ■ Request information ● Pickup point ● Expiration date ● Hold shelf expiration date ● Request ID ■ Requester information ● First name ● Last name ● Middle name ● Barcode

8.d. Circulation rules

FOLIO provides its own circulation rules system with defined criteria and logic, allowing libraries to decide how their items circulate. Libraries can write rules to specify:

- which groups of patrons can borrow which items;
- different rules for items in different locations, libraries, campuses or institutions;
- what types of items (material types) can be borrowed;
- how many of a particular type of item can be borrowed;
- what notices are sent to patrons;
- what fines and fees are charged.

When a defined set of criteria matches a circulation transaction, the policies that are attached to that criteria are then applied.

Library staff can write their rules through a built-in circulation rules editor, available to staff in the Settings app through the FOLIO user interface.

Libraries can use specific permissions to grant access to the circulation rules editor to individual FOLIO users. Access to the editor does not have to be restricted to library IT staff.

The circulation rules for the FOLIO installation exist in one file. Rules can be written in a nested format, to make them easier to read; libraries can use keywords to match on all or none for a particular criteria; and libraries can specify priority order for criteria if more than one rule matches.

Application	Feature Set	Feature Details
Settings → Circulation	Circulation Rules Editor	Criteria that can be used in rules:

		● Patron group (defined in the Users app) ● Item effective location ○ Libraries can specify locations from one to four levels deep, depending on how they want the rule to work. ● Item material type ● Item loan type Criteria can be concatenated using '+' or indentation. The "All" keyword may be used to match on all values for a specific criteria. The "Or" keyword may be used to match on one of a list of values for a specific criteria. The "!" keyword can be used to match on criteria that are not the specified criteria value. At least one criteria must be provided in a specific rule. Policy types that can be used in rules: ● Loan policy ● Requesting policy ● Notices policy ● Overdue fine policy ● Lost item fee policy ● Maximum item loan policy Only one type of policy can be applied for each rule. All policy types are reusable in multiple rules. At least one of each policy type is currently required, even for policies that would not apply (e.g., material that circulates but can't be requested will still need a request policy in the rule.)
Settings → Circulation	Loan Policies	Loan policies are used to set specific parameters for a patron loan. Those include: ● Whether an item has a fixed due date - like December 1, 2020 - or a rolling due date - like "due in 28 days" ● If the due date lands on a day the library is closed, whether the due date rolls forward to

		the next open day, backward to last open day, or stays on the same day. ● Whether a loan should have a grace period before it is overdue ● Whether a loan should be renewable, and if so, how many renewals are allowed ● Whether a loan should be recallable, and if so, how long the patron gets the item for, and how long they have to bring it back ● Whether an item with a waitlist (additional holds) gets a different loan period
Settings → Circulation	Request Policies	Request policies are used to determine what types of requests patron groups are allowed to place for items defined by other criteria in the rule (location tree, material type, loan type). Request policies specify the following parameters: ● Whether an item can be requested for hold; ● Whether an item can be paged; ● Whether an item can be recalled.
Settings → Circulation	Notice Policies	Notice policies are used to determine what types of notices would be sent for a successful loan defined by rule criteria. Librarians write notice templates in a separate area; the policy then specifies when those templates are sent as part of a loan. Currently, notices can only be sent via email. Supporting for printing notices is planned. Notice policies specify the following parameters: ● What types of templates are sent on loan, and for what events. ● What types of templates are sent for requests, and for what events. ● What types of templates are sent for fee/fine charges.
Settings → Circulation	Overdue Fine Policies	TBD - part of MVP, currently in development.
Settings → Circulation	Lost Item Fee Policies	TBD - part of MVP, currently in development

Settings → Circulation	Maximum Item Loan Policies	TBD - currently in development

8.e. Course reserves (Q4 2019)

Libraries, generally academic, need the ability to provide Course Reserve services. FOLIO's Course Reserve app includes the ability to create a Course listing and associate that listing with its Term, Instructors, and Items. Through the use of API's and drivers public facing OPAC and discovery systems can also use this data to provide patrons with real time information regarding Courses and associated items.

Application	Feature set	Feature details
Course	Create new	Click "New" button to create: Users create a record for an individual course that can be associated with Instructors, term, and items. Course record contains the following fields: ● Course name ● Course number ● Course section ● Department ● Course type ● Register ID ● External ID Courses can be "cross listed"
Instructors	Associate user with Course	Within the Course record - click ● Scan User barcode ● Displays user name, barcode, and patron group (from user app)
Settings - Terms	Create new	In Course Reserves > Settings
	Associate term with course	Within the Course record - click ● select Term ● Sets the default start and end dates for items placed on reserve
Settings - Departments	Create new	In Course Reserves > Settings
	Add department to Course	
Items	Associate item with course	Within the Course record - click ● search for item

		- add item (Title, barcode, call number, enumeration, publication, URL) - Edit item temporary location - Edit item start and end date (for reserve) - Set a Reserve processing status - Enable addition copyright tracking fields - totalpages in item - total pages used % or pages used - Payment basis

8.f. Cross tenant borrowing

Requirements still being defined

8.g. ILL

Requirements still being defined

9. MARC Cataloging

Waiting on @cult

10. Import records

Need someone to document

11. Export Records

Requirements in process

12. Discovery Integration

What do people want to see here?

13. E-Usage Counter Harvester

Add a description here that explains the service and how it interacts with other parts of the system.

Application	Feature set	Feature details

eUsage	Search Usage Data Provider	● Search Usage Data Provider
	Filter Usage Data Provider	Filter by: ● Harvesting status: Active; Inactive ● Harvest via: Sushi; Aggregator ● Aggregator: e.g. Nationaler Statistikserver (Germany)
	View result list	● Provider Name ● Harvesting Status ● Latest Statistics ● Aggregator
	Sort results	By: ● Provider Name ● Harvesting Status ● Latest Statistics ● Aggregator
	View details	Click on a search result row to view: ● Provider Name ● Harvesting configuration ○ Start harvester for provider ○ Harvesting status ○ Harvest via ○ Service Type ○ Service Url ○ Report release ○ Requested report ○ Harvesting start ○ Harvesting end ● SUSHI credentials ○ Customer ID ○ Requestor ID ○ API key ○ Requestor name ○ Requestor mail ● Notes ● Statistics ○ Monthly reports grouped by year and report type ○ Color indication per report: green (OK); orange (harvest failed but max attempts not reached); red (harvest failed and max attempts reached) ○ Report Info per report ■ Date YYYY-MM ■ Harvest error messages (if applicable) ■ Failed Attempts (if applicable) ■ Actions ● Delete report ● Download report as JSON/XML

		● Download report as CSV ○ Expand all years ○ Download reports for multiple months ■ Start (Year-Month) ■ End (Year-Month) ■ Select report type ■ Download report as CSV ● COUNTER file upload ○ Drop or select file and upload
	New Usage Data Provider	● Usage Data Provider Information ○ Provider Name* ○ Description ● Harvesting Configuration ○ Select Harvesting status*:Active; Inactive ○ Select how to harvest*: Aggregator; Sushi ○ Select an aggregator ○ Vendor code ○ Select the vendor's API type*: Counter-Sushi 4.1; Counter-Sushi 5.0 ○ Enter vendor's service URL* ○ Report release*: Counter 4; Counter 5 ○ Add report ■ Counter 4: JR1; JR1 GOA; JR1a; JR2; JR3; JR3 Mobile; JR4; JR5; DB1; DB2; PR1; BR1; BR2; BR3; BR4; BR5; BR7; MR1; MR1 Mobile; TR1; TR2; TR3; TR3 Mobile ■ Counter 5: DR; IR; PR; TR ○ Harvesting start*: YYYY-MM ○ Harvesting end: YYYY-MM ○ Customer ID* ○ Requestor ID ○ API key ○ Requestor name ○ Requestor mail ● Notes ○ Enter notes
	Edit harvest	See New Usage Data Provider
	Delete harvest	Possible
	Tags	Tags functionality available
Settings	eUsage - General	Aggregators: Create new aggregator ● General information ○ Name* ○ Service Type*: e.g. Nationaler Statistikserver (Germany) NOTICE: Specific modules per service type required ○ Service URL* ● Aggregator Configuration

		○ Add key/values pairs according to Aggregator specification ● Account configuration ○ Type: Mail; API; Manual ○ eMail-Address ○ Add contacts Display settings: Hide sushi credentials in detail view
	eUsage - Harvester settings	Harvester Configuration ● Set number failed attempts ● Start the harvester for the current tenant ● Define periodic harvesting ○ Start date ○ Start time ○ Periodic interval: Daily; Weekly; Monthly ○ Last triggered at
	Periodic Harvesting of COUNTER reports	Automatic periodic harvesting according to specification in settings

14. Reporting (Ad-hoc)

What do people want to see here. Someone from the reporting SIG should fill this in. I would not list the reports available.

15. Standards & Interoperability

A. Edge common framework

The intent of edge-common is to simplify the implementation of edge APIs by providing much of the boilerplate code shared among these APIs. Full documentation and source available at **Github:** https://github.com/folio-org/edge-common

B. Orders API

The purpose of the orders edge API is to bridge the gap between 3rd party purchasing systems/vendors and FOLIO. More specifically, the initial implementation was built with EBSCO's GOBI (Global Online Bibliographic Interface) service in mind, though that API is commonly used by other vendor ordering systems and should work with those systems as well. Full documentation and source available at **Github:** https://github.com/folio-org/edge-orders and **API Documentation:** https://dev.folio.org/reference/api/#edge-orders

C. OAI-PMH version 2.0

Edge API for Metadata Harvesting (OAI-PMH Version 2.0)

Code and documentation available at **Github:** https://github.com/folio-org/edge-oai-pmh

API Documentation: https://dev.folio.org/reference/api/#edge-oai-pmh

D. SIP2

The purpose of the SIP2 edge API is to bridge the gap between self service circulation and patron services stations and FOLIO by allowing these systems to issue requests and receive responses in Standard Interchange Protocol v2 (SIP2). These requests will be serviced by FOLIO APIs and the responses will be based on FOLIO results for all supported (TBD) SIP2 commands.

The SIP protocol does not consider security apart from providing the possibility of self check/circulation system negotiated encryption algorithm for the password and user ID, which seems unlikely to be used. All communication over the wire, via TCP, is plain text. Since FOLIO, along with this module, can be hosted in the cloud, plain text communication is not acceptable. It is *strongly* recommended that a library secure communication from the self check terminal to the edge-sip2. To this end, edge-sip2 can be configured to use TLS to encrypt communication. This requires the self check terminal to communicate with TLS as well. It is our understanding that most self service kiosks do not have this ability natively and third party solutions must be employed. Stunnel is recommended in these cases. Stunnel can be downloaded here: https://www.stunnel.org/downloads.html

The following self check commands & responses are supported:

	Command messages to circulation system	Response messages from the circulation system
1	Patron Status Request	Patron Status Response
2	Checkout	Checkout Response
3	Checkin	Checkin Response
4	Block Patron	Patron Status Response
5	SC Status	ACS Status
6	Request ACS Resend	Request SC Resend
7	Login	Login Response
8	Patron Information	Patron Information Response
9	End Patron Session	End Session Response
10	Fee Paid	Fee Paid Response
11	Item Information	Item Information Response
12	Item Status Update	Item Status Update Response
13	Patron Enable	Patron Enable Response
14	Hold	Hold Response
15	Renew	Renew Response

16	Renew All	Renew All Response

E. NCIP

Code and documentation is available at Github: https://github.com/folio-labs/mod-ncip

F. SAML SSO

Security Assertion Markup Language is an open standard for exchanging authentication and authorization data between parties, in particular, between an identity provider and a service provider. This module implements the 2.0 version of SAML standard. This module sometimes referred as SAML Client, and identity provider (or IdP) is referred as a SAML Server. Code and documentation is available at **Github**: https://github.com/folio-org/mod-login-saml

G. Z39.50 (SMS and LMS integrations)

Does not yet exist

H. RDA

Someone from the MM SIG needs to fill this in

I. BIBFRAME

Someone from the MM SIG needs to fill this in

16. Settings - Additional general FOLIO settings

For FOLIO configuration options not covered in the sections above