Wichita State University (MOBIUS)

FOLIO Formal Training Agendas & Session Prerequisites

All recommended resources can be accessed through EBSCO Connect. Learners must create an account to sign in and access FOLIO Training resources.

Circulation: Basics

Tuesday, June 24, 2-3:30 PM Central (3-4:30 PM Eastern) on Zoom

- Guided navigation through features in Circulation-related apps, including Users, Check Out, Check In, Inventory, Requests, and Circulation Log
- Demonstrations of workflows related to managing users, loans, item statuses, requests, and simple reporting from the Circulation Log

Prerequisites to view before attending training:

- Watch videos: (estimated completion time: 45 min.)
    - FOLIO Overview: Users (12 min.)
    - FOLIO Overview: Circulation Apps (15 min.)
    - FOLIO Overview: Fee/Fine and Block Settings (18 min.)

Circulation: Workflows

Thursday, June 26, 9-10:30 AM Central (10-11:30 AM Eastern) on Zoom

- Guided exploration of advanced circulation features and workflows, including more detailed coverage of item statuses, requests, fee/fine management, and related reporting.

Prerequisites to view before attending training:

- Watch videos:
    - Review FOLIO Overview: Circulation Apps (15 min.)
    - Review FOLIO Overview: Fee/Fine and Block Settings (18 min.)

Metadata 1: Inventory

Wednesday, July 9, 2-3:30 PM Central (3-4:30 PM Eastern) on Zoom

- Guided navigation and discussion of Inventory app record structure and quickMARC
- Workflow demonstrations including creating, editing, and deleting records
- *Additional topics may be added if needed: MARC Authorities*
- MARC Authority app
    - Demonstrations of creating, editing, and deleting records in the MARC Authority app, as well as quickMARC linking in the Inventory app

Prerequisites to view before attending training:

- Watch videos: (estimated completion time: 18 min.)
    - [FOLIO Overview: Inventory](#) (10 min.)
    - [FOLIO Overview: quickMARC](#) (8 min.)

- *If needed,* Watch videos: (estimated completion time: 18 min.)
    - [FOLIO Overview: MARC Authority App](#) (15min.)
    - [FOLIO Overview: MARC Authority Settings](#) (3 min.)

- Additional Resources:
    - [Instance Record Creation Options](#)

Metadata 2: Batch Workflows

Thursday, July 10, 10-11:30 AM Central (11 AM-12:30 PM Eastern) on Zoom

- Data Export: methods in Inventory, configuring custom profiles (Settings)
- Data Import: how default profiles work, configuring your own profiles (Settings)
- Lists app
    - Guided navigation in the Lists app, and discussion of record types and available fields, with example queries for creating and editing custom Lists
- Bulk Edit app
    - Guided navigation and discussion of record types available in the Bulk Edit app
    - Demonstrations for initiating bulk edit jobs using identifiers or queries, as well as accessing record exports and bulk edit logs

Prerequisites to view before attending training:

- Watch videos: (estimated completion time: 1 hr 24 min.)
    - [FOLIO Overview: Data Export App](#) (14 min.)
    - [FOLIO Overview: Data Export Settings](#) (11 min.)

- FOLIO Overview: Data Import App (9 min.)
- FOLIO Overview: Data Import Settings (29 min.)

- FOLIO Overview: Lists App (8 min.)
- FOLIO Overview: Bulk Edit App (16 min.)

You are encouraged to schedule Q&A Exploratory Sessions with your FOLIO Training Specialist after this training, if you would like to discuss further unique workflows in greater depth.

Acquisitions 1: Foundations

Monday, July 14, 1-2:30 PM Central (2-3:30 PM Eastern) on Zoom

- Overview of features in the Finance and Organizations apps
- Introduction to Fiscal Year Rollover (FYRO)

Prerequisites to view before attending training:
- Watch videos: (estimated completion time: 31 min.)
    - FOLIO Overview: Finance (16 min.)
    - FOLIO Overview: Organizations (15 min.)

Acquisitions 2: Workflows

Wednesday, July 16, 1-2:30 PM Central (2-3:30 PM Eastern) on Zoom

- Guided navigation and demonstrations in the Orders, Receiving, Serials, and Invoices apps
- Discussion of variations in acquisitions processes for physical / electronic materials, one-time / ongoing order structures, and monograph / serial workflows.

You are encouraged to schedule additional Office Hours with your FOLIO Training Specialist after this training, if you would like to discuss your unique workflows in greater depth.

Prerequisites to view before attending training:
- Watch videos: (estimated completion time: 1 hr 11 min.)
    - FOLIO Overview: Orders (22 min.)
    - FOLIO Overview: Receiving (15 min.)
    - FOLIO Overview: Serials (17 min.)
    - FOLIO Overview: Invoices (17 min.)

Acquisitions 3: Integrations

Monday, July 21, 10-11:30 AM Central (11 AM-12:30 PM Eastern) on Zoom

- Discussion and demonstrations to support integrations including GOBI ordering, EDIFACT Orders/Invoices, Data Import to create orders from MARC, Invoice voucher export

Recommended resources for preparation:
- Watch videos: (estimated completion time:)
    o [Integrating EBSCONET Renewals with FOLIO](#) (10 min.)
    o [FOLIO Overview: GOBI Integration](#) (17 min.)
- Additional Resources:
    o Interactive Learning Guide: Organizations, [Adding Integration Details to a Vendor Record](#)

Electronic Resources Management (ERM)

Wednesday, August 6, 9:30-11 AM Central (10:30 AM-12 PM Eastern) on Zoom

- Overview of the importance of organization records and required fields
- Workflow demonstration encompassing eHoldings, Agreements, and Licenses
- Discussion of features in the Dashboard app for tracking ERM processes

Prerequisites to view before attending training:
- Watch videos: (estimated completion time: 1 hr 10 min.)

    o [FOLIO Overview: Organizations](#) (15 min.)
    o [FOLIO Overview: eHoldings](#) (18 min.)
    o [FOLIO Overview: Agreements](#) (15 min.)
    o [FOLIO Overview: Licenses](#) (12 min.)
    o [FOLIO Overview: Dashboard](#) (10 min.)

- All of these resources have been gathered in the [Electronic Resources Management in FOLIO eLearning Course on EBSCO Academy,](#) if you would like to review these resources in a comprehensive course structure and see your progress with achievements.
    o (Make sure to sign in with your EBSCO Connect account to view the FOLIO course.)

- Additional Resources:
    o [EBSCO Acquisitions ERM Workflow Diagram](#)
    o [ERM Feature Comparison: FOLIO eHoldings and Holdings Management](#)

System Administration

Thursday, August 7, 12:30-2 PM Central (1:30-3 PM Eastern) on Zoom

- Guided demonstrations for triage and troubleshooting of routine system issues
- Discussion of the content of the FOLIO System Administration – Planning Guide, including any questions from learners about FOLIO system maintenance
- *Additional topics may be added if needed: Tasks app*

Prerequisites to view before attending training:

- Resource Guide: **HIGH IMPORTANCE – Review before session**
    o [FOLIO System Administration – Planning Guide](#)

- Watch videos: (estimated completion time: 48 mins)
    o [FOLIO Overview: Calendar](#) (9 min.)
    o [FOLIO Overview: Fee/Fine and Block Settings](#) (18 min.)

    o [What to Expect: FOLIO Upgrade Process for New Releases](#) (9 min.)
    o *If you would like to go beyond minimum preparation:*
        ▪ *Open the [Release and Upgrade Resources collection](#) and view the most recent Release Update video.*

    o *If needed*: [FOLIO Overview: Tasks App and Settings](#) (12 min.)