

# Navigating within License and Agreement records

## 1. The View > Edit workflow

Feedback from implementers has highlighted an issue with the record edit workflow. The decision to edit a record is often driven by the user's review of content in the view pane. For example, when viewing a license a user might notice that a supplementary document has an out of date file attached and decide to replace the file with the correct version. On selecting "Edit", the license is opened in edit mode with all the accordions expanded. Supplementary documents lay at the very bottom of the form and the user now has to find the document again before the file can be replaced. Users currently do this by:

1. Using the browser's inbuilt search to locate the file. This involves having to remember information about the document and to decide what to search on. It's possible (sometimes likely) that more than one occurrence of the search term could be located in the page.
2. Collapsing all accordions, expanding the single "Supplementary documents" accordion, and then locating the document to be updated. This involves needing to remember the accordion name and some detail about the content which needs updating.
3. Leaving the accordions expanded and scrolling from the top of the page to the bottom looking out for the document.

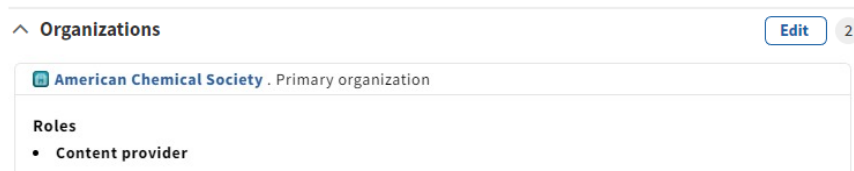
Each of these methods involves more mental effort and time than is ideal and we'd like to explore an option for improving the UX of the View > Edit workflow.

### Add "Edit" buttons per accordion the Agreement view which jump to the same accordion in the edit view

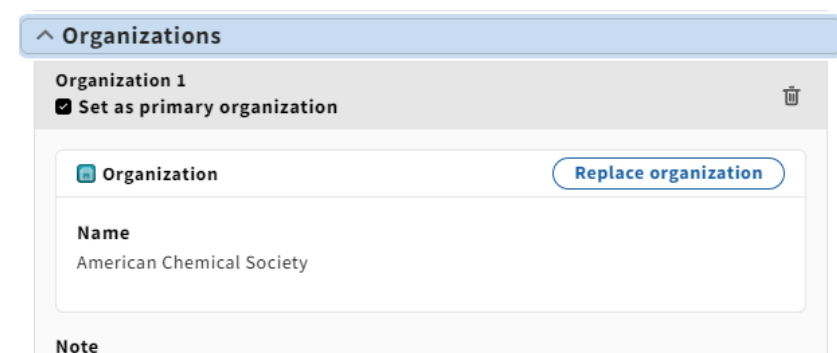
Each record could offer more granular, "Edit" options. The mock up on the left below shows the "Organizations" accordion in the Agreement view pane. Selecting the Edit button here would open the agreement edit form with the Organizations accordion expanded and given focus as shown in the screen snip on the right, akin to how bookmarks work in web pages. The agreement edit form could be displayed with:

1. all accordions expanded with the "Organizations" accordion in focus (i.e. displayed at the top of the screen), or
2. all accordions collapsed apart from the "Organizations" accordion.

**Agreement “View” pane:** Organizations accordion. User selects “Edit”



**Agreement “Edit” pane is opened:** Organizations accordion is expanded and given focus



**Q1. Would you find Edit buttons in the accordions in view panes as described helpful or are you happy with your current way of working?**

Jack (UMass): Currently we do not have enough information in an agreement for this to be an issue (the ctrl+f would work fine) but in the future it might be helpful. I usually just scroll to find the info I want to edit.

Martina S.(VZG): Definitely helpful, to be able to quickly access the accordion I need to edit, without scrolling

Nina S. (tub Hamburg): At the moment I proceed as described above: To check something I first use the read mode in an agreement. If I then want to change something, I have to go into edit mode, scroll, first to the top, click on "Close all accordions", then open the accordion I need. So edit buttons would be very helpful

**Q2. Which method would you prefer? Opening the agreement edit form with:**

1. all accordions expanded with the “Organizations” accordion in focus (i.e. displayed at the top of the screen), or
2. all accordions collapsed apart from the “Organizations” accordion.

Jack (UMass): #1, otherwise if I want to edit more information I need to go searching through the accordions.

Martina S. (VZG): #1

Nina S. (tub hamburg): I am not sure. But I prefer method 2. When I click on "Edit" in an accordion in view mode, I really only want to go there. If I want to review and edit a whole document, I would probably start at the top.

**Q3. Once in the Edit form, do you experience any issues navigating within it, for example moving between accordions or fields, or are issues just related to finding your way from the View pane to the correct part of the edit form?**

Jack (UMass): This is not limited to edit view, but the sort on agreement lines is difficult to navigate when multiple AGLs (specifically more than 10) are attached to the Agreement. I end up needing to use ctrl+f to find the right one because scrolling and scanning is difficult.

Martina S. (VZG): +1 to Jack, the sorting can still be confusing for me

Sara C.: This also applies to Supp Docs.

Nina S.: (tub Hamburg): I just noticed: Since the update to Kiwi, I always end up directly at the organization and not at the top when I open the edit mode for the agreements for which I have later added a 2nd role for the organization.

**Q4. Please share any examples you have of issues relating to the View > Edit workflow and/or navigating within the Edit pane.**

Jack (UMass): My main issue when in the edit view is that the notes helper app notes are not also editable - or viewable. I'd love them to be displayed like orgs. Where I can launch out to another view to edit those records - I understand the architecture wouldn't necessarily allow me to edit inline with the content of a sup. doc.

**Q5. Thinking now about the reverse process from Edit to View, i.e. selecting "Save & close" in the Edit form and then Viewing the saved record, do you have any comments/suggestions about this part of the workflow?**

Jack (UMass): When saving, and then immediately trying to scroll the browser "jumps" back to the top of the agreement. This is incredibly frustrating when trying to edit an agreement and then editing notes - I can usually get the notes accordion open before it jumps and I have to scroll back down to the bottom of the record. Hiding the accordions with no content has made it a little easier but it's still frustrating to have the browser screen jump from where you're looking at.

Nina S. (tub Hamburg): I think I had already told this. When I do a search in the persons app and then edit a record and close it again, my results list is gone. This does not affect the view mode, but also happens after editing. And an addition to the notes: When I create or edit a note and save it, the "Notes" accordion is then closed and the sorting made of the existing notes is cancelled. I would prefer to return to the opened accordion with the same sorting.

## 2. Visibility of accordion options

For Agreement and License records it's already possible to manage some aspects directly from their "Views", as opposed to the main "Edit" pane. The examples below show *A: Amendments and Notes on a license record* and *B: Agreement lines and Notes on an agreement record*. Additional options "Add amendment" etc, are displayed when each accordion is expanded.

### A: Amendments and Notes on a license record

- New amendments can be created and attached via the option "Add amendment"
- New notes can be added and existing notes managed via the options "New" and "Assign/Unassign"

#### License view pane with accordions collapsed

|              |            |
|--------------|------------|
|              | Expand all |
| ▼ Terms      | 0          |
| ▼ Amendments | 0          |
| ▼ Notes      | 0          |

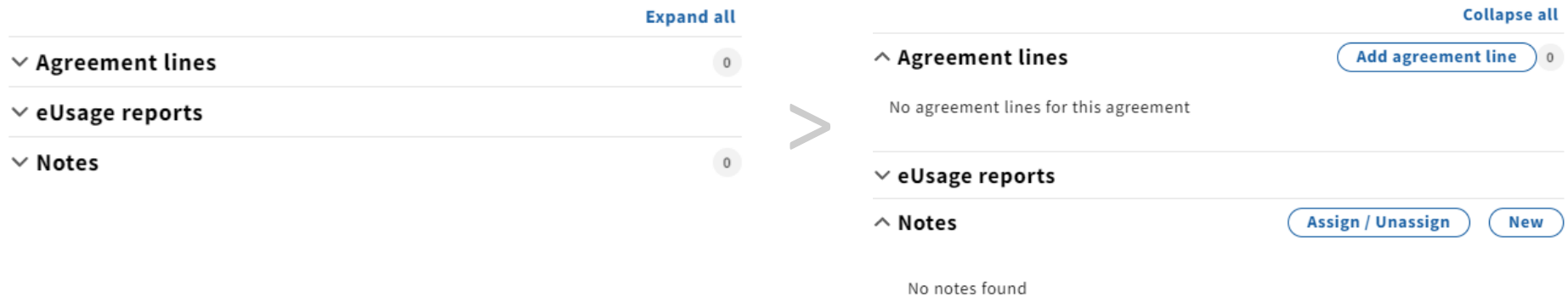


#### License view pane with accordions expanded

|                                |                                                       |
|--------------------------------|-------------------------------------------------------|
|                                | Collapse all                                          |
| ▼ Terms                        | 0                                                     |
| ^ Amendments                   | <a href="#">Add amendment</a>                         |
| No amendments for this license |                                                       |
| ^ Notes                        | <a href="#">Assign / Unassign</a> <a href="#">New</a> |
| No notes found                 |                                                       |

### B: Agreement lines and Notes on an agreement record

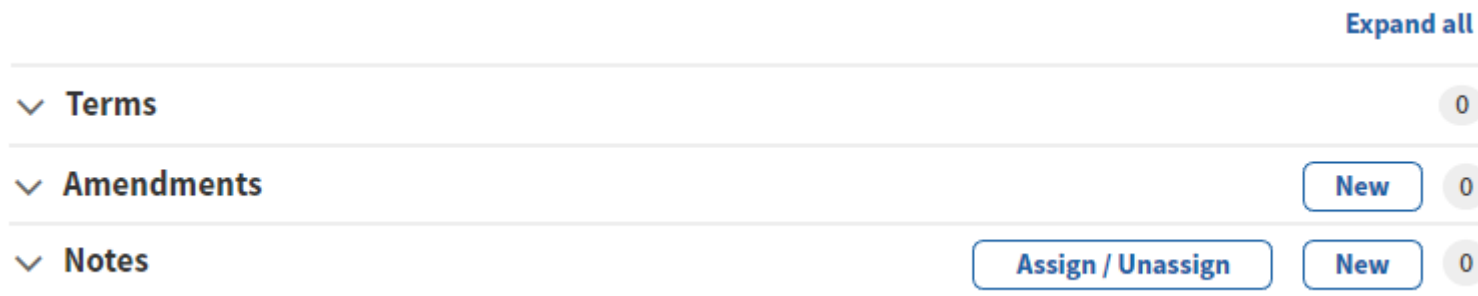
- New agreement lines can be attached via the option "Add agreement line"
- New notes can be added and existing notes managed via the options "New" and "Assign/Unassign"



### Show buttons in the collapsed accordion

Instead of expanding an accordion to view the available options they could be made visible in the closed accordion. The mock ups below show how this would look on the License and Agreement views.

#### A. License view



#### B. Agreement view

|                            |                                                       |   |
|----------------------------|-------------------------------------------------------|---|
| <a href="#">Expand all</a> |                                                       |   |
| ✓ All periods              |                                                       | 2 |
| ✓ Agreement lines          | <a href="#">New</a>                                   | 2 |
| ✓ Notes                    | <a href="#">Assign / Unassign</a> <a href="#">New</a> | 0 |

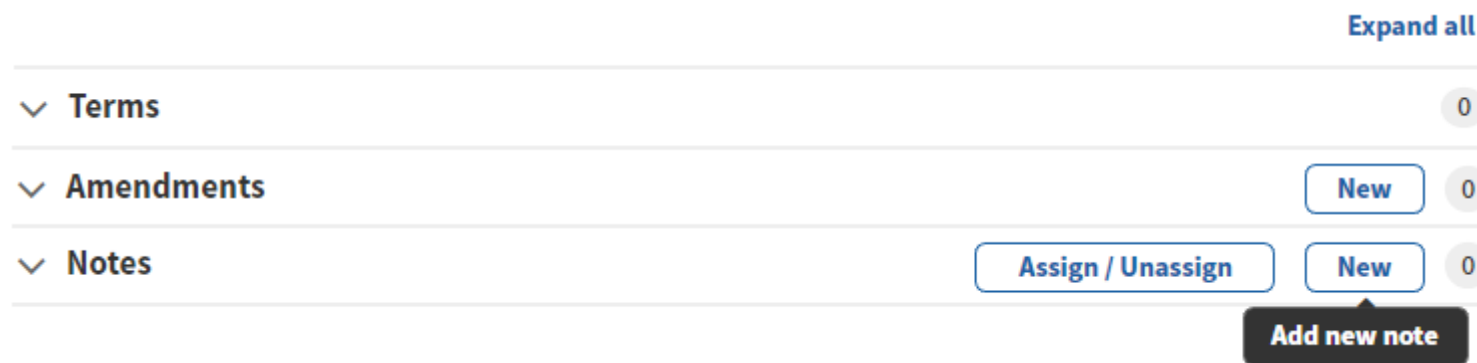
**Q1. Would you like to see any of these buttons displayed when an accordion is collapsed, if so which ones?**

Martina S. (VZG): I would not need to see any of these when accordions are collapsed, because I would want to see the existing data beforehand

Jack (UMass): +1 to Martina, though it might be a better view (per our discussion last week on system configs.) to have the buttons in the accordion header and not within it.

Nina (tub Hamburg): If there are no agreement lines or amendments, it might be useful to see the buttons in the collapsed accordion. And so I already know in this view that there is an edit button.

**Q2. In the mockup the button “Add agreements line” has been renamed as “New” to be consistent with the equivalent Notes button. The buttons could have a tooltip like the one below to help differentiate between those with the same name. Would you prefer the buttons to be named consistently as shown in the mockup or left as they are? If you have another suggestion please say.**



Martina S. (VZG): I don't have any strong feelings here. Generally, I prefer consistency where possible, in this case I am torn. Do “add” and “new” describe exactly the same actions or is there a difference in meaning?

Jack (UMass): +1

Felix (ZBW): It is a good idea to not duplicate information, so having the button label change to “add” or “new” seems like a good approach.

### 3. Managing multiple actions for an accordion

The scenarios described in 1 & 2 lead to potentially having several buttons displayed for each accordion when viewing the accordion. We'd like to get your feedback on how we should manage having multiple actions available for an accordion if we were to add in several actions per accordion. Below there are 6 different approaches (A-F) which we'd like your feedback on.

**A: All options are displayed as buttons.**

| Expand all        |                       |   |
|-------------------|-----------------------|---|
| ✓ All periods     | Edit                  | 2 |
| ✓ Agreement lines | New Edit              | 2 |
| ✓ Notes           | Assign / Unassign New | 0 |

**B. An Actions menu button is displayed when multiple actions are available.**

| Expand all        |           |   |
|-------------------|-----------|---|
| ✓ All periods     | Edit      | 2 |
| ✓ Agreement lines | Actions ▾ | 2 |
| ✓ Notes           | Actions ▾ | 0 |

**C. The edit option is displayed as an icon.** Note that “Edit” would be relevant to most accordions and hence would be the most common option.

|                   |                                                                                                                         |   |
|-------------------|-------------------------------------------------------------------------------------------------------------------------|---|
| <b>Expand all</b> |                                                                                                                         |   |
| ✓ All periods     |                                      | 2 |
| ✓ Agreement lines | <b>New</b>                           | 2 |
| ✓ Notes           | <b>Assign / Unassign</b> <b>New</b>  | 0 |

D. The edit and new options are both displayed as icons.

|                   |                                                                                                                                                                                                  |   |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---|
| <b>Expand all</b> |                                                                                                                                                                                                  |   |
| ✓ All periods     |                                                                                                               | 2 |
| ✓ Agreement lines |                            | 2 |
| ✓ Notes           | <b>Assign / Unassign</b>   | 0 |

E. The Edit options are hidden in a collapsed accordion and only displayed when the accordion is expanded.

|                            |                                                       |   |
|----------------------------|-------------------------------------------------------|---|
| <a href="#">Expand all</a> |                                                       |   |
| ✓ All periods              |                                                       | 2 |
| ✓ Agreement lines          | <a href="#">New</a>                                   | 2 |
| ✓ Notes                    | <a href="#">Assign / Unassign</a> <a href="#">New</a> | 0 |

F. Options are displayed on hover.

|                            |                                          |   |
|----------------------------|------------------------------------------|---|
| <a href="#">Expand all</a> |                                          |   |
| ✓ All periods              |                                          | 2 |
| ✓ Agreement lines          | <a href="#">New</a> <a href="#">Edit</a> | 2 |
| ✓ Notes                    |                                          | 0 |

Q1. Please say what you like and dislike about the options. Do you have a preferred option?

Eric (TAMU): I think I prefer C the best with A following. D would rank third. If the intent is to cut down on clicks, it doesn't seem like B and E are doing that. I am ambivalent about F.

Martina S. (VZG): I would prefer option D, maybe with tooltips. A and C would be fine, too. Less preferred is option F

Kristin (Chicago): three things: one, the “Plus” symbol instead of the New button strikes me as confusing. It could be misconstrued as opening the accordion. Two: I’m not a fan of hover--isn’t that also tough from an accessibility standpoint? Three: I do like the pencil in place of the Edit button. That icon makes a lot of sense. So, I guess that means I like C best.

Jack (UMass): I prefer A, though I agree with Martina that tooltips are always helpful. I think the word edit is clearer than the pencil icon - it is not very visibly striking and requires a prior understanding of symbols used in FOLIO. I also feel adding more action menus is not helpful - it means just 1 step removed from the edit button.

Felix (ZBW): A, or symbol plus text like in the action menu in other apps:

Inventory



Edit instance



Duplicate instance



Edit



New

Martina T. (hbz): D, I like the icons in combination with tooltips

Nina (tub Hamburg): When I want to edit an accordion, I look at it first. Therefore, it is a logical consequence for me to see the "Edit" button only when you open the accordion, as in E. A would also be fine, since it doesn't need any further explanation. I don't like the action menu, it's too much. I like also the icons plus text.

## 4. Hiding empty accordions

In the ERM apps, we introduced a general rule to only display an accordion in the View pane if it contains content. This was to make the record views cleaner. The two examples below show a minimally populated agreement and one with many types of content .

## Agreement with minimum accordions

Record last updated: 10/11/2021 1:20 PM

Is perpetual

Renewal priority

-

-

Description

-

Period

Previous

Current

Next

Period start

Period end

Cancellation  
deadline

10/1/2021

-

-

Period note

-

Expand all

Agreement lines

0

eUsage reports

Notes

0

## Agreement with many accordions

Record last updated: 10/11/2021 1:23 PM

Is perpetual

Renewal priority

-

-

Description

-

Period

Previous

Current

Next

Period start

Period end

Cancellation  
deadline

10/1/2021

-

-

Period note

-

Expand all

All periods

2

Internal contacts

1

Agreement lines

0

Controlling license

1

External licenses

1

License and business terms

Organizations

1

Supplementary documents

1

Related agreements

1

eUsage reports

Notes

0

**Q1. Please let us know about your experience of the pattern to hide empty accordions. If you have any issues with it please provide illustrative use cases where you can.**

Jack (UMass): I love it! It has made things much clearer for people who don't know (or frankly care) about things like eUsage and from having multiple accordions which all represent licensing info.

Nina (tub Hamburg): I also like seeing less instead of empty accordions. But I'm not sure if it's better for people who can only work in view mode to also see empty accordions or not. If they could see them, they would know that there is a way to enter that data. If not, it might be confusing to see them in one agreement but not in the other. But I'm not sure.

**Q2. Would you like to see this pattern introduced in other FOLIO apps? If so, which apps?**

Julie Brannon (Duke): I'm so glad you asked! We would love to see this feature expanded to other acquisitions apps with the exception of Finance and Receiving which don't feel cluttered with empty accordions. These are the 3 remaining apps that could benefit from this feature:

- **Organizations:** Displays 9 accordions and typically 4-6 are empty for us.
- **Orders:** Might help a little since there are usually 1-2 empty but mostly the "clutter" in Orders is that there are many fields that we don't use which this solution won't solve.
- **\*Invoices\*:** The "Fund distribution" and "Adjustments" accordions display on the invoice view even though we would rarely see data in those accordions - they would only contain data when the invoice header contains an adjustment. This causes confusion since the invoice lines **do** contain fund distribution information and the empty accordion makes the user wonder if something didn't save correctly after adding an invoice line since they see an accordion labeled "Fund distribution" that is empty (screen shot below).

Jessica (Chicago): +1 Julie

^ Invoice lines
Add New

Total number of invoice lines: 1

| # ^ | POL number   | Description                                                                                   |
|-----|--------------|-----------------------------------------------------------------------------------------------|
| 3   | 10002PERKN-1 | The Norse Atlantic saga, being the Norse voyages of discovery and settlement to Iceland, Gree |

End of list

^ Fund distribution

The list contains no items

^ Adjustments

The list contains no items

Martina S. (VZG): In general, I would like this behaviour in all apps to have it consistent. As far as prioritization is concerned I am with julie: Organizations, Orders, Invoices, additionally Inventory

Kristin (Chicago): question about hiding the empty accordions and then also being able to see the New button if you want to add data? If the accordion is hidden, then to see it, the whole Agreement would need to be put in edit mode, correct?

Jack (UMass): Agree that this would be helpful in Orgs. - other than that I am not actively working in any other FOLIO apps.

**Q3. If you could control the hiding and display of empty accordions would you expect to be able to this at:**

- A. App level: - all records in the app use the same pattern?**
- B. Record level: - there is a setting for each record view within each app?**

Julie Brannon (Duke): It seems like app level control would be sufficient - I'm having trouble thinking of an example of when we'd prefer to have more clutter on one record type than another?

Martina S. (VZG): +1 to app level

Jack (UMass): +1

Nina (tub Hamburg): Perhaps it would be helpful if there were settings for each user? And everyone can decide how to use it?

**Q4. If you could control the hiding and display of empty accordions would you expect to do this as:**

- A. A tenant setting: - the same UX for all users at an organization?**
- B. A user preference setting:- each user can set their own preferences?**
- C. Both tenant and user preference settings?**

Julie Brannon (Duke): C would be optimal since some institutions may prefer tenant level to make training and user experience consistent while others may prefer to allow users to control their preferences.

Martina S. (VZG): option C is most preferred, second would be option B

Jack (UMass): C

Nina (tub Hamburg): C