

Feedback on changes to agreements search September 2022

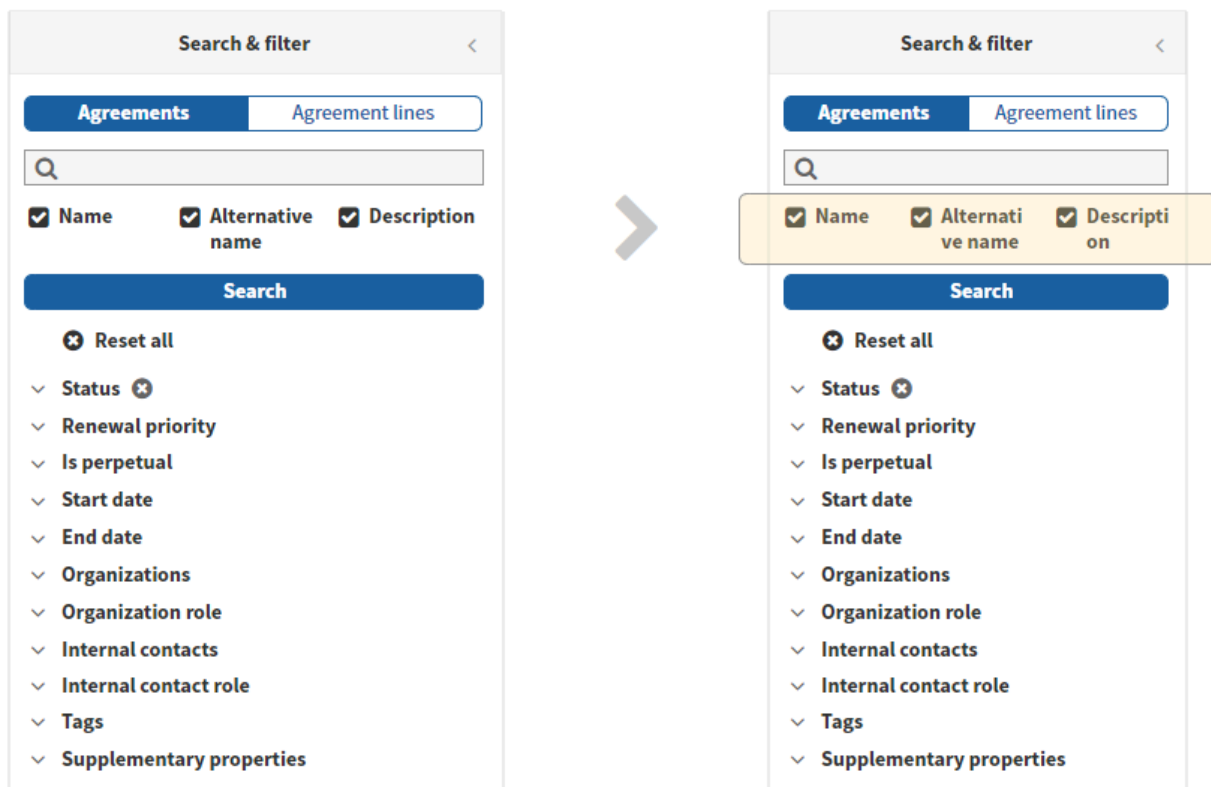
We are in the process of making a number of changes to the Agreements search (and the related E-Resources search for those using the local KB). Having done an initial implementation of:

- Options to control the fields searched by the Agreements text search
- A new agreement lines search
- New options for Package search

We'd like to get your feedback on the initial implementations and identify any changes or improvements we can make either immediately or to consider for future development.

Agreement text search option

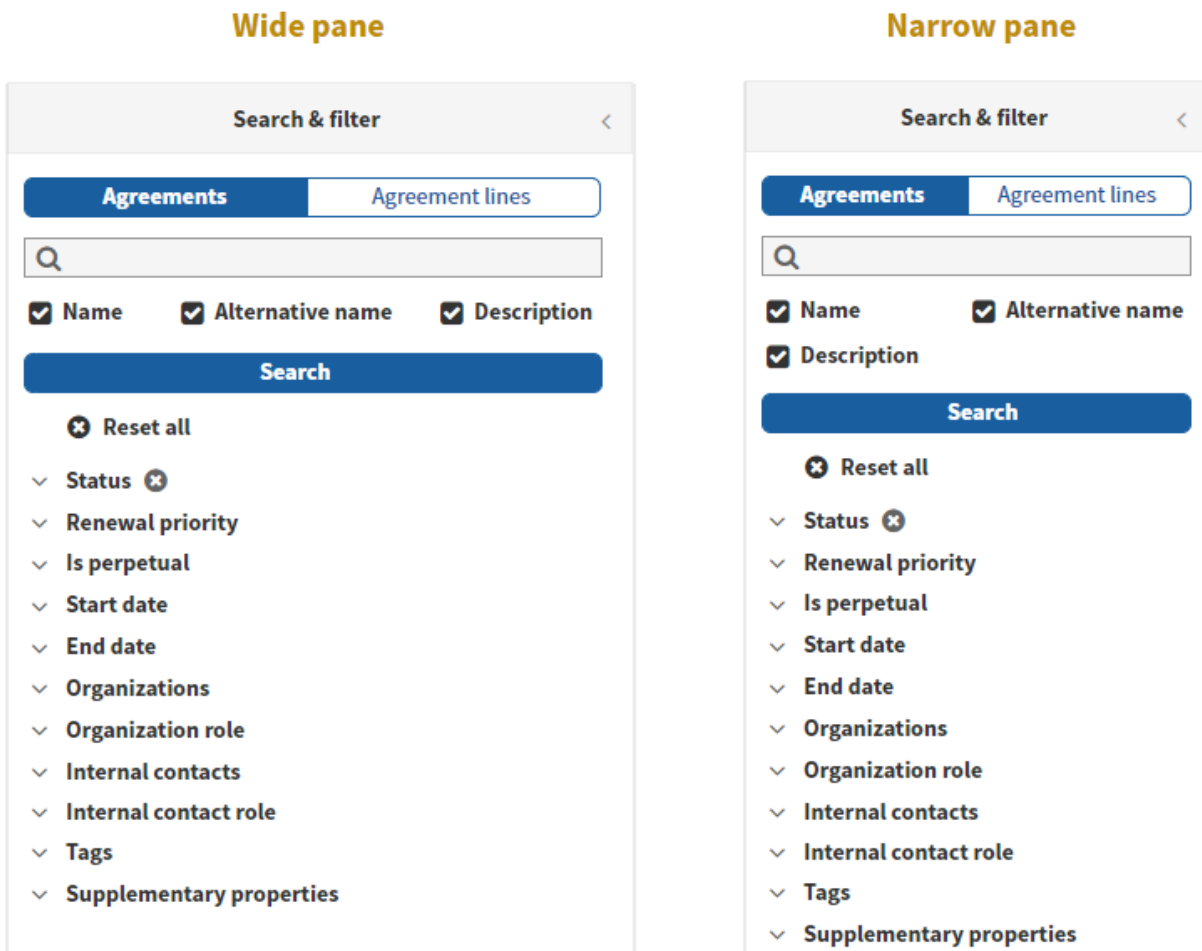
Three options “Name”, “Alternative name” and “Description” have been added to the Agreements search and filter pane, to allow users to select which of the three text fields to include when searching. They have been implemented as check-boxes to support inclusion and exclusion of each of the three fields with the minimum number of clicks. Currently they do not display well in a narrow search and filter pane. Individual words wrap, as shown below.



We would appreciate feedback on the search options as they currently stand and have some alternative options for consideration.

A. Responsive check-boxes

In this option the current implementation will be improved to remove the issue of word-wrapping. As the pane width decreases the check-box options will reposition themselves to eventually form a vertical list. The mockups below show how the search options might display on both wide and narrow panes.

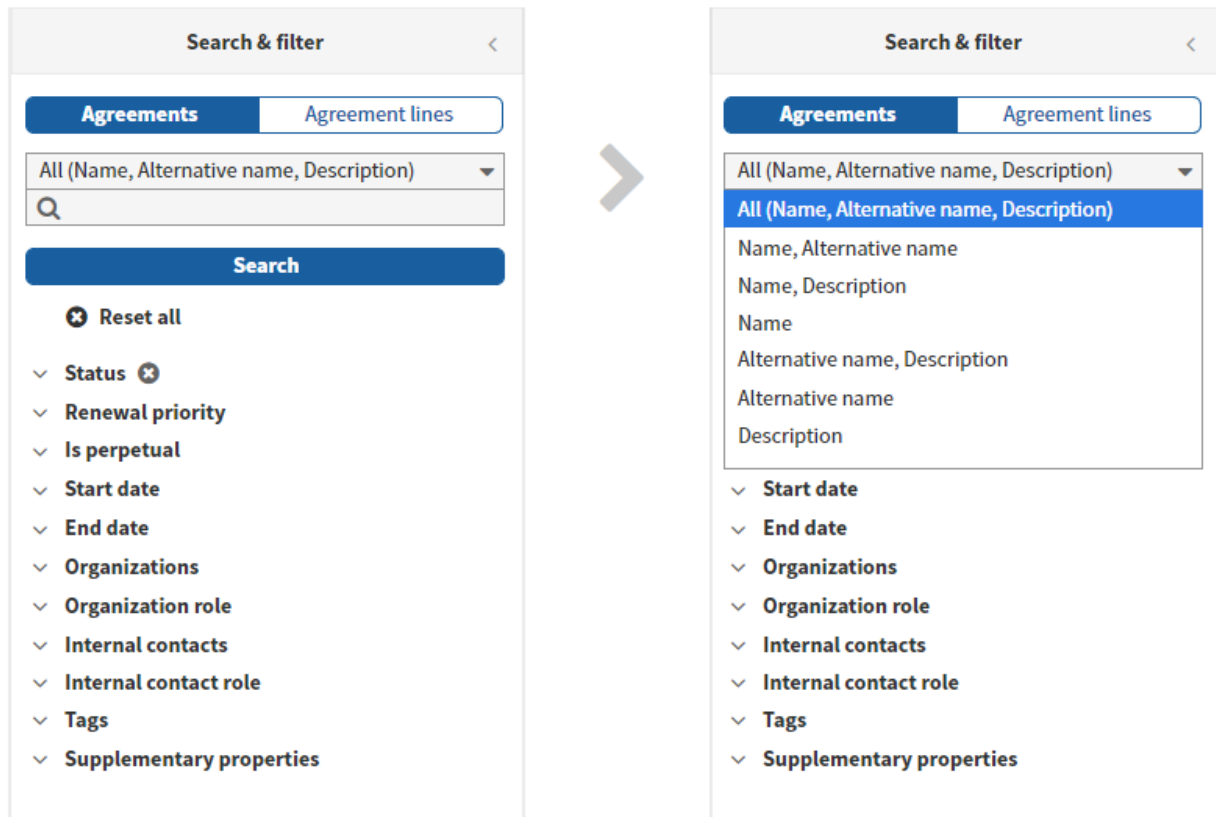


Do you have any feedback about the responsive check-box option, or thoughts about the current implementation?

Jack M. (UMass): Is the intended behavior that the boxes are checked by default to index all three fields and I uncheck one that I don't want included, or would I arrive at Agreements and the default search still indexes all three and by checking 1 or more boxes it changes the search? (Oh this question appears further down)

B. Drop-down list

A drop-down list containing combinations of the three fields could be used. This is in keeping with how search options are offered in other apps such as Inventory and Orders. If all possible combinations of the text field search options were to be included, there would be seven in total. The mock-up on the left shows the default view, which includes all of the three search text-fields. In the mock up on the right the user has expanded the drop-down list to view the seven available options.



What are your thoughts about the use of the drop-down list? Would all seven options be needed?

Kristin (Chicago): the dropdown list looks similar to others in FOLIO so that is fine. I can see where having to list the position combinations gets a little thorny. It reminds me of the SAT (A, B, C, A&C, B&C, A&B&C). I wonder if just having a single option for all fields, and then a field

for each individual field would be sufficient. I write this without doing a lot of searching myself, but it seems a little clunky at the moment. Or maybe

All

Name

Name, (incl. Alternative Name)

Description

I'm not sure why one would want to search alternative name without Name, but maybe there is a use case. I could see limiting only to name if too many irrelevant results come up, but I am thinking like the title field in Inventory: that brings up content from the 245 and 246 in the record, and I don't think you can search those fields individually.

Felix (ZBW): +1 to Chicago. Keyword search on all three fields and then one index per field. I'd be fine with both ways

All

Name

Name, (incl. Alternative Name)

Description

or

All

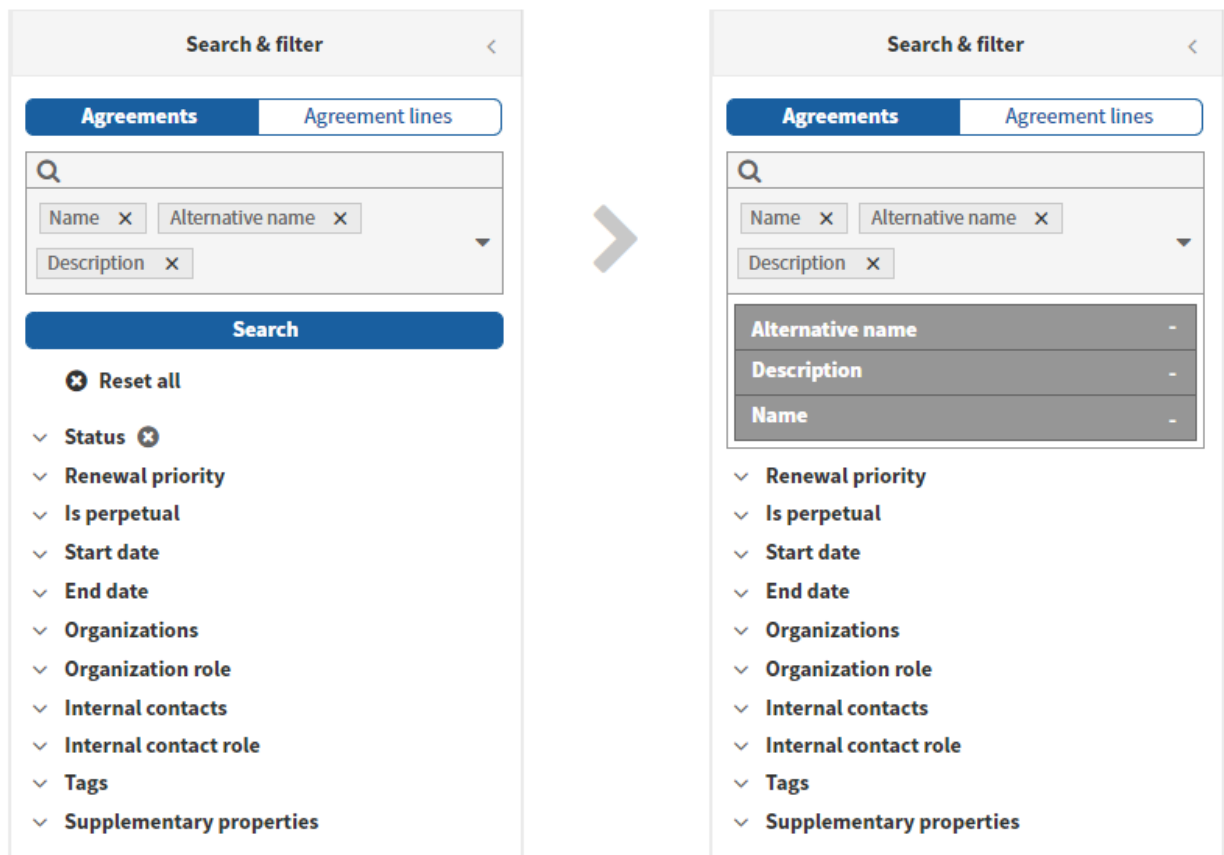
Name

Alternative Name

Description

C. Multi-select field

The multi-select field could be used as an alternative way to include and exclude each individual field. The mock up on the left below shows the default view, which includes all of the three search text-fields. In the example on the right the user has expanded the field to show the available values.



Do you have any feedback about the use of the multi-select field?

Felix (ZBW): My initial reaction to this approach is "too clicky" and too hard to scan for the user's eye which indices are selected, but I'm not an UI expert.

Which of the three proposed options do you prefer?

- A. Responsive check-boxes
- B. Drop-down list
- C. Multi-select field

Jack M. (UMass): Definitely A, responsive check-boxes. The drop down would be unwieldy and too confusing and multi-select would just take longer than checkboxes.

Jessica (Chicago): A or C. I agree that the dropdown would be too confusing, but I do like the option of being able to select what fields we're searching.

Lars-Håkan (Chalmers): A would be fine, but if you go for C, that would be ok too. No real opinion..anyway it should not be too complicated. (Sorry we cannot attend the meeting today)

Sara C. (MH): I also prefer A, but see how B is like in other Apps but it is also different in what it is trying to achieve, so I think diverging would be ok for that reason.

Zorian (EBSCO): A, for the reasons given above by Jack.

Felix (ZBW): B, but with the changes Kristin and I highlighted in the "question B section". I expect the user in most cases not to change the default (=search on all three fields) and therefore like the discreet index drop-down list. The downside of the checkboxes in my eyes is that they distract the user's view of the pane.

Additionally, no matter which interface is used, we would like some feedback on the preferred behaviour of these settings when clicking the 'Reset all' button in search:

If you make a selection of which fields to include in the search, would you expect the "Reset all" button to return to the state where they are all selected (i.e. the default to search across all the available fields)? If not, what would you expect (if anything) to happen when you click 'Reset all'?

Jack M. (UMass): I would expect the checkboxes to become unchecked - but that assumes that by not checking any boxes the search indexes all three fields.

Jessica (Chicago): I would expect the checkboxes to keep Name and Alternative Name selected and to have Description deselected, but I don't think this will affect our searching too much either way.

Lars-Håkan (Chalmers): Both Jacks and Jessicas suggestions are ok for us.

Sara C.(MH): I would expect on Reset to have all 3 boxes being checked, and then I would uncheck the one(s) I did not want included for my search.

Zorian (EBSCO): Whichever behavior is consistent across all other FOLIO apps

Felix (ZBW): +1 to Sarah. A click on "Reset all" button should reset the app in the state it is

when it is first launched. If the checkboxes are selected initially, then “reset all” should re-establish this state.

If you were to select no options (for example in the current UI, uncheck all the boxes), would you expect:

- That the search would apply to all the fields
- That the search would apply to none of the fields
- It shouldn't be possible to select no options
- Something else!

Jack M. (UMass): That the search would apply to all the fields. This is overall my preferred UX for FOLIO since these are just ways of filtering search results which in other systems is an opt-in experience rather than arriving at what may be a pre-filtered search (or one that applies all filters by default and then I have to remove a bunch to just choose 1 specific one)

Jessica (Chicago): +1 Jack. I would expect that a search with no options selected would apply to all of the fields.

Lars-Håkan (Chalmers): +1 Jack

Sara C.(MH): “It shouldn't be possible to select no options” – OR by default all would be unchecked, and then one would apply the “filtering” for the search by checking the ones one wanted only to search just then

Felix (ZBW): +1 Jack

Agreement lines search

The initial implementation of Agreement line search has been implemented. At this stage we would like to get feedback on the search options we've initially provided and what options you would ideally like to see.

You may wish to take a look at the Agreement Lines search as currently working on <https://folio-snapshot.dev.folio.org/> or <https://folio-snapshot-2.dev.folio.org/> before answering the questions below.

On opening the agreement line search the screen will automatically display 100 results even before any search terms or filters have been entered. This keeps the behaviour consistent with the Agreements search, but it is not the same as other apps.

Assuming, for the moment, the Agreements search will continue to behave as it does currently, do you think there is any need for the Agreement Lines search to follow the same pattern?

Jack M. (UMass): I don't think it needs to behave the same - I like that agreements does this for browsability which isn't something I'd need when going to make a search for a specific AGL

Jessica (Chicago): I agree. I'd prefer for agreement lines to not appear until search terms or filters have been applied. I don't see a need for browsing agreement lines.

Lars-Håkan (Chalmers): +1

Sara C.: Given our local situation, getting the first 100 is useless to me in any case. ;-)

Felix (ZBW): +1 to the notes above. No need to display the first 100 AGRLines

If we assume that we can make changes to the current behaviour of automatically returning search results across all parts of the Agreements app, what would your preferred behaviour be? (i.e. when you open the Agreements search, Agreement lines search, or local KB E-Resource search initially, should results automatically display before you have entered any search or filter options?)

Jack M. (UMass): If the options are one or the other I would want to preserve the current behavior of the main Agreements section - returning a browsable list. This lets me just select a filter and quickly get to the smaller set of results I want to see.

Jessica (Chicago): +1 Jack. Keeping the agreements list browsable is important to us.

Lars-Håkan: +1

Sara C. (MH): I would prefer to have a blank screen when I hit Reset or go fresh to Agreement, like I experience in Inventory, Orders, Finance, ...

Felix (ZBW): Returning a list of agreements is preferred by our staff, with a change to the

default filters. In Licenses, only records with status “active” are displayed by default. We’re proposing to apply this to Agreements too, and don’t preselect the other statuses. Re. e-resources search in the local KB I’m proposing to don’t display any results by default, before the user has performed a search. It takes 32 seconds for the results to load when clicking on the tab. That’s with 166,267 records found in the database. It does not make any sense displaying all e-resources starting with symbols to the user:

Suchen & filtern		E-Ressourcen 166.267 Datensätze gefur			
Vereinbarungen		Name ^	Typ	ISBN	IS
<input type="text"/>	Suche	!Te Total: A New Communicative Spanish Course.2002-01-01 (1)	Buch	9781315832456	
<input type="button" value="Alles zurücksetzen"/>		""... aber von Ihnen dependier ich unüberwindlich..."" Friedrich Hölderlins ferne Leidenschaft".1995-01-01 (1)	Buch	978-3-476-04223-1	
Publikationstyp		""... immer das Ganze vor Augen""..2000-01-01 (1)	Buch	978-3-476-02724-5	
<input type="checkbox"/> Fortlaufende Ressource		""... und sogar eine alberne Ordnung ist immer noch besser als gar keine...""2001-01-01 (1)	Buch	978-3-476-02774-0	
<input type="checkbox"/> Monografie		""... wortlos der Sprache mächtig""..1999-01-01 (1)	Buch	978-3-476-04302-3	
Typ		""... Alles ist nach seiner Art""..2001-01-01 (1)	Buch	978-3-476-02795-5	
<input type="checkbox"/> Buch		""... Aufführung"" und ""Schrift"" in Mittelalter und früher Neuzeit".1996-01-01 (1)	Buch	978-3-476-05562-0	
<input type="checkbox"/> Datenbank		""... Auflösung der Natur, Auflösung der Geschichte""..2001-01-01 (1)	Buch	978-3-476-02773-3	
<input type="checkbox"/> Zeitschrift		""... Aus mütterlicher Wohlmeinung""..1999-01-01 (1)	Buch	978-3-476-03468-7	
Ist Paket		""... Baal"" und der Junge Brecht".1966-01-01 (1)	Buch	978-3-476-99623-7	
<input type="checkbox"/> Ja		""... Besaß auch in Spanien manch' luftiges Schloß""..1999-01-01 (1)	Buch	978-3-476-03794-7	
<input type="checkbox"/> Nein		""... Blühendes Leid""..2003-01-01 (1)	Buch	978-3-476-05248-3	
Externe Datenquelle		""... Braver Junge - erfüllt mit Gift""..2001-01-01 (1)	Buch	978-3-476-02754-2	
<input type="text"/>		""... Cela m'était égal""..2001-01-01 (1)	Buch	978-3-476-02776-4	
Tags		""... Critica Musica"" - Studien zum 17. und 18. Jahrhundert".2001-01-01 (1)	Buch	978-3-476-02784-9	
		""... Dann ist Vergangenheit beständig""..2001-01-01 (1)	Buch	978-3-476-02793-1	
		""... Das Band der ewigen Liebe""..1996-01-01 (1)	Buch	978-3-476-03661-2	
		""... Das Kind in meinem Leib""..2004-01-01 (1)	Buch	978-3-476-02945-4	
		""... Das Weib der Zukunft""..2000-01-01 (1)	Buch	978-3-476-04310-8	
		""... Denn alles findet bei Bach statt""..2000-01-01 (1)	Buch	978-3-476-03798-5	

The current search looks for the search term in the following fields:

- Resource name (for resources from the internal KB only)
- eHoldings Resource identifier (for resources from eHoldings only - this is the eHoldings/EKB identifier for a resource such as "26-3262881-14313557" which is the identifier for "100 Case Reviews in Neurosurgery" in the Elsevier eLibrary package)
- Agreement line Description
- Agreement line Note

Do you think any of these fields should be excluded from the search?

Jack M. (UMass): For the eHoldings ID - does it have to be the three part ID or could it just be the ID for the provider, package, or title on its own?

Sara C. (MH): For eHoldings users: Will the Agreement line Description also be searchable EVEN WHEN it does not display in the MCL because one has linked the resource via eHoldings? (I would like that.)

Zorian (EBSCO): +1 for what Sara noted

Are there any fields that we are not currently including that you would like to see included in the text search?

Sara C. (MH): POL(s)? ... I know this is a minefield ... and I admit I am not even exactly sure what ALL I mean by it. That is, since we are all basically new to FOLIO and when we migrated (I believe) we all mostly left a lot of old PO(L)s behind, migrating only Open PO(L)s or maybe more recently Closed ones Yet as keys they can be really useful and valuable, so that, for example, I may not have migrated older/closed PO(L)s to Orders, but I reference them in my AGLs because they in conjunction with their Invoices (Proof of payment) and/or Licenses are what is the basis for why we have access to years a-c for XYZ, etc. ... POLs & Invoices just feel really undervalued in Agreements [NB: when I wrote the previous, I had not gotten to the below yet about, It is possible to search for Agreement lines for a specific agreement, or agreement lines for a purchase order line (POL), by looking up the relevant agreement/POL and adding it to the filter. And that is GREAT!! Really, I mean to be able to find an AGL that has a Linked (!) POL by its POL! A great step forward! Thank you. ... But still, what if they are not linked or cannot be linked?.... Owen, you said, ask for the Moon, or something like that. ;-)

Felix (ZBW): Maybe I'm missing something, but what I can tell from <https://folio-snapshot.dev.folio.org/erm/agreementLines> is that you can filter on AGLines by POL data via the POL plugin. Would that work for you?

Would it be useful to be able to select exactly which fields are included in the text search (as we are currently implementing for Agreements)? If Yes, please give an example of why this would be useful.

Jack M. (UMass): Yes, not only for UI consistency but for the same reasons I would want these options for agreement search - I might be storing different types of information in an agreement line note than Sara C. which could make accurate searching across our 5C implementation difficult, so toggling off the note search when I just need to find a title makes things easier.

Sara C. (MH): +1 to Jack

You can currently filter the results by "Agreement line type" which offers the options:

- Detached
- External
- Internal

The explanation of these is:

- Detached -> There is no resource linked to the agreement line
- External -> There is a resource linked to the agreement line from outside the local KB (i.e. an eHoldings resource)
- Internal -> There is a resource linked to the agreement line from the local KB

Is it useful to be able to filter agreement lines by type in this way?

Jack M. (UMass): Yes? I don't think it's not useful but without having it in practice I'm not sure yet. If I can just select Detached and return the list of relevant AGLs that would be very helpful. (It looks like this is currently the functionality which I do like)

Sara C. (MH): Yes, I would love to be able to Filter for Detached vs External. Currently I have a Tag for it, which I have not been good about applying etc so this would be so much better! Also because of something that happened a while back, I have since then refrained from using Tags at the AGL level and only use them at the AG level, so my mh_aglnotlinkedhlm Tag frequently is only so-so helpful in any case, since I have AGs with some Detached and some External AGLs. This would be much better since at the correct level and not dependent on me being good about applying the Tags consistently!

Felix (ZBW): Could external be hidden if eHoldings is not configured and internal be hidden if <https://folio-snapshot.dev.folio.org/settings/erm/general> > checkbox "hide internal agreements kb" is selected? That way users of one KB option would not be distracted by the options that don't apply for their institution. I'm not aware of any other external KB that is being used today.

If you think the filter is useful, what labels would you suggest we use for these different Agreement line types? (if the current labels are clear and suitable, please also indicate that here).

Jack M. (UMass): I like these - we've created our own ways of referring to these things (5C refers to detached AGLs as Local since we don't use the internal KB) so having the system reinforce a naming convention would make communication during SIG meetings easier.

Sara C. (MH): External and Internal are fine, but I do like Local better than Detached. To me, Detached implies that it should be attached but is not, when that may not be the case at all.

Felix (ZBW): @Sarah I get your point with "Detached", but "Local" can be confusing for users of the "local" KB, as this implies AGRLines with data from the local KB. In our documentation this concept is named "unlinked agreement line", see <https://lotus.docs.folio.org/docs/erm/agreements/#adding-an-unlinked-agreement-line>. Maybe use:

- External
- Internal
- Unlinked

It is possible to search for Agreement lines for a specific agreement, or agreement lines for a purchase order line (POL), by looking up the relevant agreement/POL and adding it to the filter. Does this approach make sense to you or would you prefer this to work in a different way?

Jack M. (UMass): It's a bit confusing to have to search for something to filter a search I've already performed - I'd rather it be responsive to my result list, if I search for "Journal of Fish" and multiple AGLs come up I'd love to see the relevant POLs attached to those AGLs from my results to just quickly filter down. Sort of like how the Inventory location limiters now work.

Sara C. (MH): Yes to Jack BUT also I do really really like that there is a way now that I can search by the POL and just the POL, right?

Felix (ZBW): As Sara mentioned, it is possible to use the POL filter without a prior search in the textbox. So if you knew the POL number is 10001-1, you can add this in the "Select order lines" popup and if this POL is referenced in an AGRLine, your result will show up. I think that's a good approach, as it is possible to not only use the POL number as search criteria, but also text search on the linked instance and even filter on POL attributes.

Would it be useful to be able to specify multiple agreements or POLs rather than just a single one in the search filter?

Jack M. (UMass): Yes

Jessica (Chicago): Yes

Sara C. (MH): Yes

Felix (ZBW): I'm not sure for now, but if "yes" then please provide an easy and convenient way, e.g. with only opening the "Select order lines" once and then having a way to search for POL 1, select it and search for POL 2, select it and so on.

Do you have any comments or questions about the other filter options we've currently implemented?

Jack M. (UMass): Similar to the Supp. Property query builder - I think if there was a way to perform these searches all at once (targeted text of AGL title + limit to parent agreement + search Active To Date for example) it would cut down on the time it takes a power user to find what they want, but for a first pass this would definitely make finding specific content easier.

Felix (ZBW): Being able to search on active from/to is a real improvement.

Jessica (Chicago): This may have been brought up before, but I would love to see an option for searching for agreements that aren't linked to specific areas of FOLIO. For example: Agreements with no agreement lines; Agreements with no license records linked; Agreements with no Organization linked. This would help us clean up our records easier, particularly when we create agreements on the fly, but need to go back and add the organization, license record, etc.

Also, it would be helpful to be able to search agreement names & agreement line names at the same time. Staff don't always know if a collection we purchased was created in FOLIO as an agreement or agreement line. It would help in these situations to be able to search across both.

Sara C. (MH): +100 to what Jessica writes about finding: AGs with no Org, no AGL, etc ... like in Supp Props: Is Not Set ... AND a way to search to find/display all my Related Agreements together. Not sure how ... but maybe, I search for an Agreement, retrieve it, and then could click on something that then shows me together all the Agreements related to this one in the big middle pane, not just under the Related agreement accordion on the one. Also just simply a way to find Agreements that have Related Agreements would be super useful.

In the Agreement line results we currently display the columns:

- Name/Reference (resource name for local KB resources, the EKB reference number for eHoldings resources)
- Description
- Note
- Active from date
- Active to date

Are all these columns necessary? If not, which would you remove?

Jack M. (UMass): Is there absolutely no way to display the actual title data from eHoldings? Also for detached AGLs it's confusing that they have no data in the name/reference field - it makes sense since you name it via the description which is it's own field but when I tested it caught me by surprise.

Are there any columns you'd like to see added to the display?

Jack M. (UMass): Parent Agreement Name & Linked POL

Jessica (Chicago): +1 Jack

Sara C. (MH): +1

Would it be useful to be able to navigate from an Agreement to a list of all the agreement lines that are part of that agreement in the Agreement line search? (i.e. link to a search that filters to just lines from that agreement)

If so, are you happy that this might overwrite any search you have previously done in the

Agreement line search view?

Jack M. (UMass): Yes and Yes. This would solve the issue of scrolling & loading more on agreements with a large volume of AGLs.

Jessica (Chicago): I agree. This feature would be useful and I'd be ok if it overwrote my prior search.

Sara C. (MH): Could it open in a new tab instead?