

Change Request - Inline search and filtering

Request Details

This change was initiated by a number of new and existing customers of eReserve Plus. The latest ticket was from UNE on ticket [#1679](#).

The Change Request documentation has been drafted in consultation with:

Version 1.0 – 23 August 2019

- UNE - assistance with drafting requirements

Version 1.1 - 3 September 2019

- All Customers

The current state of the software is initially outlined, followed by the proposed changes to the software.

Current software

Currently Students, Academics and Library Staff do not have any counts, filtering or search features available on their reading lists. To manage large reading lists the only tool available at present is a native browser search using Chrome, Firefox or Edge.

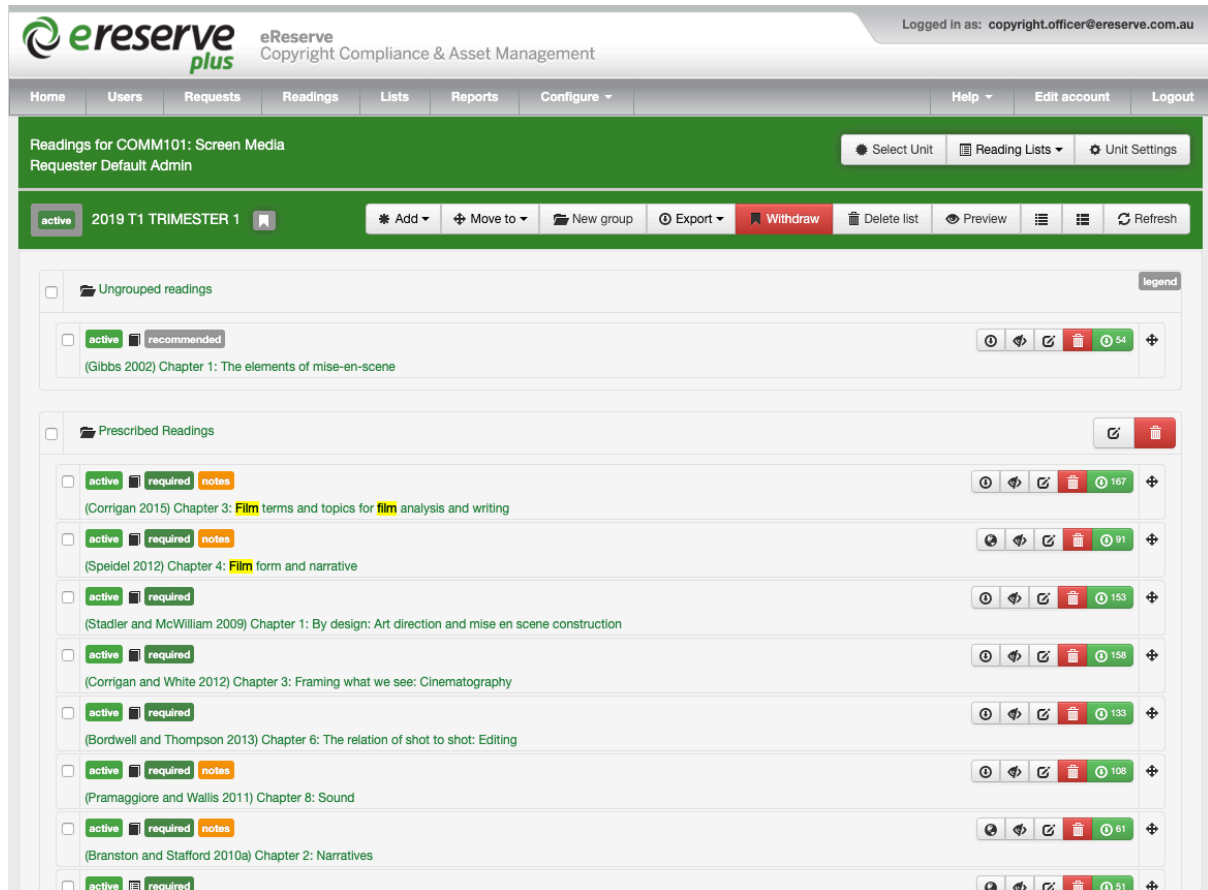


Figure 1 - Admin View - List Management - In-browser reading list search for 'film'

Proposed Change

New functionality is proposed for all Users that view or manage reading lists - this will apply to Students, Academics and Library Staff.

Desired User Stories

1. As a Student/Academic/Document Manager I need to see how many resources are on a reading list and in each group on my list so that I can see the size of the reading list quickly
2. As a Student/Academic/Document Manager I need to filter my list by reading importance - required or recommended readings so that I can prioritise the efforts I make on course readings
3. As a Student/Academic/Document Manager I need to filter my list by type of resource - books, journals, websites, visual or sound readings - so that I can target my efforts to work through readings
4. As a Student/Academic/Document Manager I need to search a reading list by author, title and any other data displayed as part of the citation on my reading list so that I can quickly find a resource.

Front-end Changes

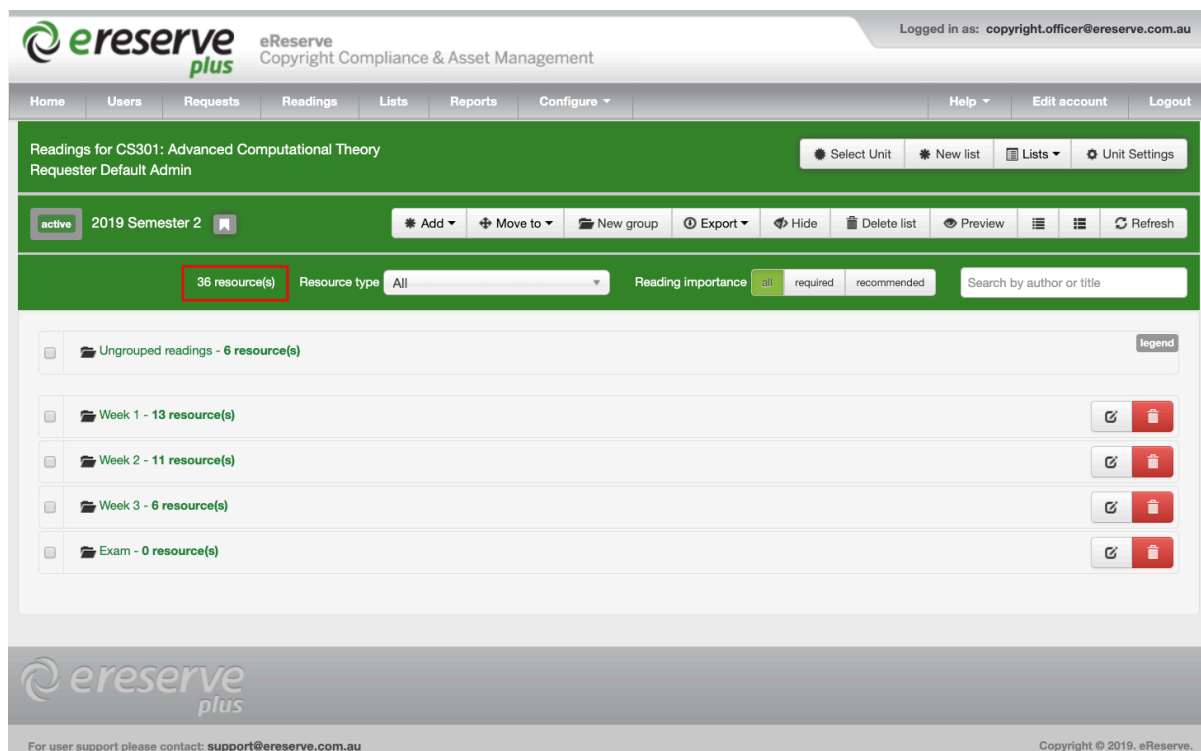
A list of requirements is listed in a table below outlining the proposed importance of the requirement based on MoSCoW principles. This approach will later assist eReserve in determining the priority for delivery.

READING LISTS

The following set of requirements has been gathered as proposed features for all users of reading lists.

Use MoSCoW - Must Have, Should Have, Could Have, Won't Have

No.	Requirement	MoSCoW	Comments
A1	Show Total number of resources on a list	M	
A2	For each group on a list show the total number of resources in each group	M	



The screenshot shows the eReserve Plus interface. At the top, the logo and 'eReserve Copyright Compliance & Asset Management' are visible. A navigation bar includes links like Home, Users, Requests, Readings, Lists, Reports, and Configure. The main header indicates the user is logged in as 'copyright.officer@ereserve.com.au'. Below this, the unit 'CS301: Advanced Computational Theory' is selected, with 'Requester Default Admin' as the requester. A filter bar shows '36 resource(s)' (highlighted with a red box), 'Resource type: All', and 'Reading importance: all, required, recommended'. The resource list is organized into groups: 'Ungrouped readings - 6 resource(s)', 'Week 1 - 13 resource(s)', 'Week 2 - 11 resource(s)', 'Week 3 - 6 resource(s)', and 'Exam - 0 resource(s)'. Each group has a checkbox and a legend icon. The footer contains contact information for user support and a copyright notice for 2019.

Figure 2 - Reading List > Total number of resources

No.	Requirement	MoSCoW	Comments
A3	Filter all resources on a list by the following resource types: - Books - Journals - Websites - Sound - Visual resources	C C C C C	

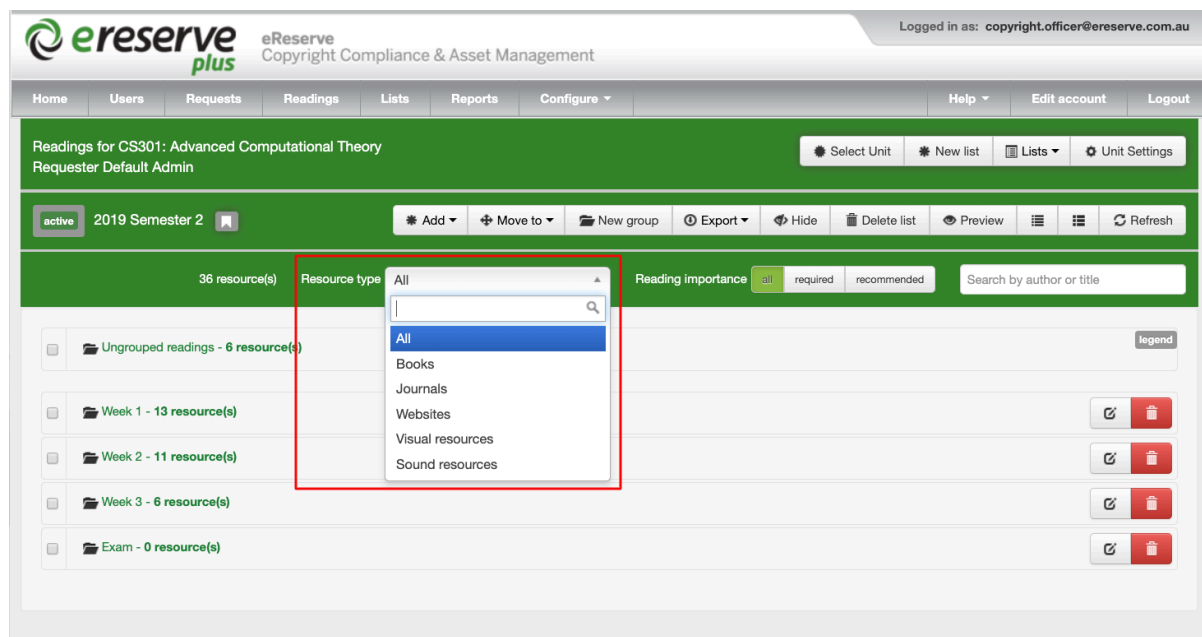


Figure 3 - Reading List > Type of resources

A4	Filter all resources on a list by the following reading genre types: - Book - Chapters etc - Journal - Articles etc - Websites - Sound - Broadcast etc - Visual resources - Broadcast excerpts etc	C C W C C	
A5	Filter all resources on a list by: - Electronic - Physical resource (in the library)	W W	We are unable to achieve this in full in the first stage because some integrations do not return this information to eReserve via the API or the physical resources workflow is not turned on (e.g. Primo only)
A6	Filter resources on a list by importance: - Required - Recommended		Should be dropdown consistent with Resource Types. The screenshot below shows a different implementation of filtering

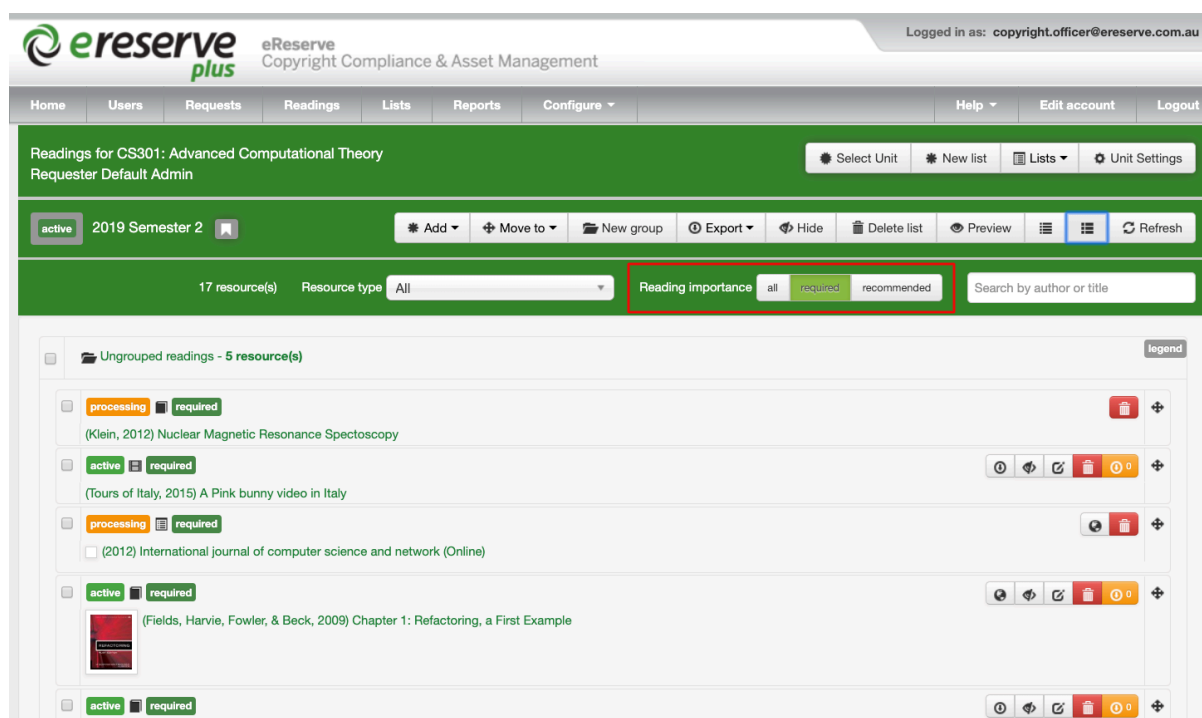


Figure 4 - Reading List > Reading importance

A7	Search all resources on a list by - Author - Reading Title - All Citation metadata	M M S	Search should have a magnifying glass icon and should just say 'Search'.
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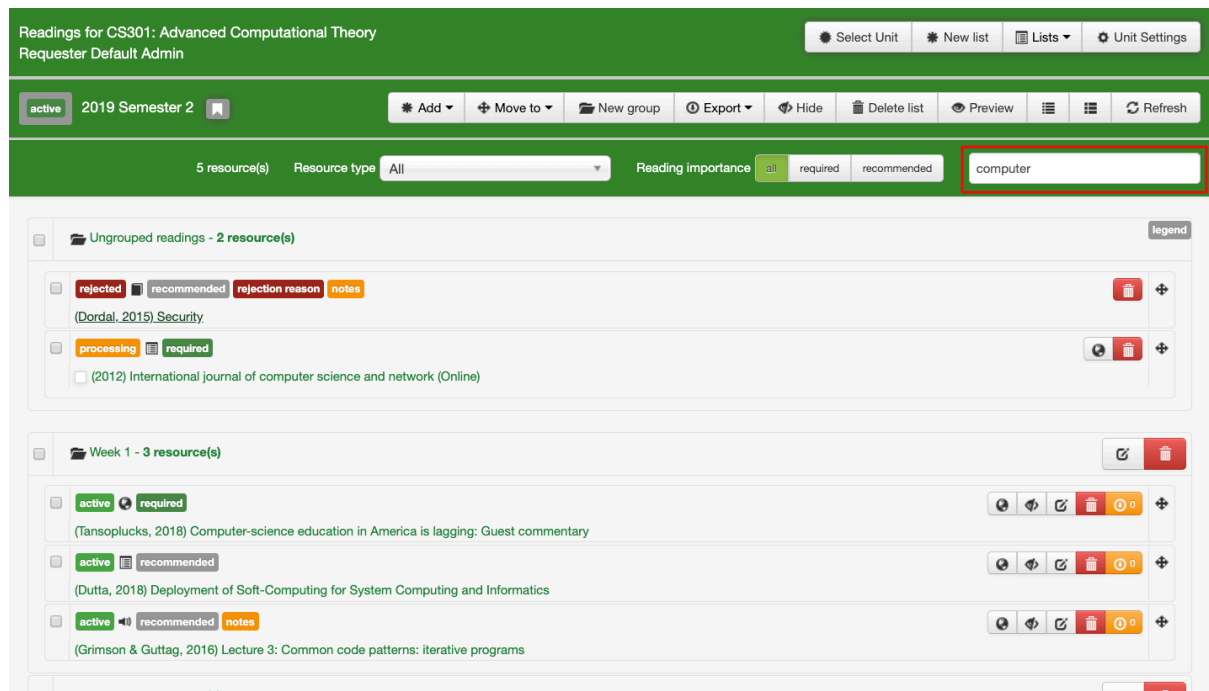


Figure 5 - Reading List > Search/Filter all resources on a list by author

A8	Re-tally all counts if a resource is changed on a reading list: - Added - Moved - Deleted	M M	
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Back-end Changes

eReserve Plus is already collecting a lot of data - the intention would be to expose this information in the user interface to better assist users with their day-to-day use of the system.

There is therefore no requirement to update the database tables.

Other considerations

Consider legal, privacy, technical challenges

Data - none identified

Technical - none identified

Commercial - none identified



COMMERCIAL IN CONFIDENCE
Status - Consultation Closed

Next steps for eReserve

- Release proposed development to Staging for any customer who has requested to test and feedback