2023-08-24 WOLFConMeeting notes: cross-app search

Date
06 Sep 2023

Housekeeping
- Convenor: Laura Daniels, Martina Schildt

Discussion items

1. Alignment on cross-app search syntax
   a. Collection of discussion items: Search expectations across apps

Minutes

- topic for this discussion: cross-app consistency of search syntax - search behaviour is a separate topic
- truncation could be state 1 and wildcard state 2 of planning and development
- if user wants to search for a fragment (that is truncated in both directions) the user can do a phrase search in inverted commas
- searches should NOT always be left anchored and truncated by default
- searches should NOT be left anchored by default
  - we should not change any of the searches in Inventory because some data is normalized - don't want to lose anything that has been reached so far
- maybe some variation is okay, but we should try to minimize variation
- would advanced search be a solution here?
  - advanced search is available in Inventory
  - there was no discussion on advanced or expert search in ERM so far - in ERM for some filtering query builder are used
  - agreement: try to align in wildcards - advanced search or even query builder are too complicated = "one step after the other"
- AGREED
  - agreement: left anchored or not should be a separate selection - via e.g. a checkbox or syntax

Wildcards

- The following wildcards should be used across all FOLIO apps:
  1. * which matches 0, 1 or many characters
  2. ? which matches a single character
- The above wildcards should be usable within strings.

Spaces handling

- spaces handling should be consistent
- there is already a ticket existing for Inventory
- white spaces handling should be consistent between Inventory and Orders - no matter how
- there might be IDs with spaces - spaces in between fragments are not concerned here
  - possibility: can search box provide different search options?
  - or quotes?
  - a good advanced search would work for different types of users
- there is a concern for barcodes and call numbers - leading and trailing white spaces can cause errors in spine labelling
- Tim Darlington in chat: We had a few user records with leading or trailing spaces in the barcode field. Sierra ignored these, Folio doesn't which means the barcode search fails. We corrected the barcodes but it would make sense to strip leading or trailing spaces from data
- that's why agreement on:
  - AGREED
    - Leading and trailing white spaces should be eliminated - no searching for leading and trailing white spaces
  - AGREED
    - Leading and trailing white spaces should not be saved - no saving of leading and trailing white spaces

Case sensitivity or insensitivity

- all searches should be case insensitive
- when using quotes the search should nevertheless be case insensitive

Inconsistency between searching in apps or modals

- aligning all modals, apps and plug-ins is always extra work
- topic is important but separate - maybe something to discuss in TC

Contains vs. starts with

- similar to left-anchored, but the specific use case listed here: Search expectations across apps (line #5) is about filtering - it is not a search issue
- components should behave consistently
- contains is preferred, because in drop-downs there is usually not too much data
- there seems to be a difference for multi-select filters (starts with) and single-select filters (contains)
we need a separate discussion or a poll in order to check all use cases

Example for starts with by Kimberly:
- in Finance app there are ledger groups - there are no filter options for these ledger groups
- starts with would help grouping funds together (=multi-select behaviour)

Wen-ying Lu in chat: I use "Has" (i.e., Contains) and "Starts with" in Sierra often and hope FOLIO can include them without having to use the workaround.

Example when creating an order for contains:
- when creating a POL the user can select the fund code from a drop-down menu
- the user can filter for fragments
- the drop-down is a single-select and filtering uses "contains"

Locations are a similar use case
- There exists controlled language in orders that behaves differently in different use cases
- sometimes user wants to search "Google style" and just type in - sometimes user wants to search more advanced, e.g. left anchored and using search syntax
- it would be good to accommodate multiple needs

Title search in orders
- left pane to search and filter - when trying to find a POL by "title or package name"
- the search is very literal, user has to add e.g. commas
- e.g. if there is a typo for a package title "E-Book package on semantic web" and added a comma by mistake "E-Book package on semantic, web"
- a search for "title or package name" will find no results when entering "semantic"
- the user needs to search for "semantic," to find results

Kristin: can replicate the example - they never search for title in orders, but search in Inventory

Next steps
- we need to bring the agreement to the POs
- get tickets for each into Jira for POs to replicate stories

Chat

Laura Daniels: Hello remote attendees. I'll be doing my best to monitor chat and speaking up for you. But I may also be running around the room.

Lisa Smith - Mich State: Reacted to "Hello remote attendees..." with ðŸ’

Laura Daniels: Feel free to unmute and speak up. We want you to be part of this conversation.

Chelsea - FOLIO Training Specialist: Reacted to "Hello remote attendees..." with ðŸ’

Kimberly.Smith@mtsu.edu: Reacted to "Hello remote attendees..." with ðŸ’

Karen E Cowen (she/her/hers): No sound on Zoom yet.

M. Dietrich: the audio on Zoom is really patchy...

M. Dietrich: Reacted to "No sound on Zoom yet..." with ðŸ’

Laura Daniels: Apologies, we're looking into it

Karen E Cowen (she/her/hers): Reacted to "Apologies, we're loo..." with ðŸ’

M. Dietrich: Reacted to "Apologies, we're loo..." with ðŸ’

Laura Daniels: did you just hear Martina?

Karen E Cowen (she/her/hers): We hear you now.

M. Dietrich: yes

Wen-ying Lu (she/her): Yes

M. Dietrich: perfect!

Laura Daniels: thank you for letting us know

Karen E Cowen (she/her/hers): Audio is hard to understand. Lots of echo.

Laura Daniels: it is echoing right now? (with Owen speaking)

Kimberly.Smith@mtsu.edu: yes

Laura Daniels: got it

Chelsea - FOLIO Training Specialist: Could someone share the link for the page we are currently viewing?

Karen E Cowen (she/her/hers): Yes, sounds like both mics are on.

Stephanie Larrison: no not better

Laura Daniels: https://wiki.folio.org/x/5KcMBw

Chelsea - FOLIO Training Specialist: Replying to "https://wiki.folio.o..."
Thank you! :)

00:21:23 Karen E Cowen (she/her/hers): No.
00:21:55 Owen Stephens: Can you hear Martina now?
00:21:56 Laura Daniels: how is it now?
00:22:11 Karen E Cowen (she/her/hers): Still same.
00:22:20 Karen E Cowen (she/her/hers): Now, good!
00:22:21 Kimberly Pamplin: That sounds better.
00:22:26 Kimberly.Smith@mtsu.edu: Yes
00:22:27 Stephanie Larrison: Yes
00:22:27 Lisa Smith - Mich State: Yes, sounds better!
00:22:29 Kimberly Pamplin: Yes
00:22:32 Karen E Cowen (she/her/hers): Perfect. But we can't see you now.
00:22:33 Dung-Lan Chen: yes!
00:22:40 Lisa Smith - Mich State: Yes
00:22:41 Stephanie Larrison: tiny bit
00:22:43 Kimberly.Smith@mtsu.edu: it was faint
00:22:52 wijianen: Sounds great, faint but audible
00:22:57 Chelsea - FOLIO Training Specialist: Thanks so much for working on this, we all really appreciate it δỸ™.
00:22:59 Karen E Cowen (she/her/hers): Can't see you now, though.
00:23:49 Laura Daniels: I turned our video back one
00:23:52 Laura Daniels: *on
00:45:04 Laura Daniels: Advanced search feature: https://issues.folio.org/browse/UXPROD-4424
00:55:40 Tim Darlington: We had a few user records with leading or trailing spaces in the barcode field. Sierra ignored these, Folio doesn't which means the barcode search fails. We corrected the barcodes but it would make sense to strip leading or trailing spaces from data
00:58:06 Laura Daniels: Reacted to "We had a few user re..." with δỸ'
01:20:11 Laura Daniels: Kimberly, we see your hand
01:20:27 Laura Daniels: If you'd like to unmute after Maura's done, please do so
01:20:33 Laura Daniels: otherwise, we can read from chat
01:21:16 Kimberly.Smith@mtsu.edu: It is not picking up
01:24:23 WOLFcon 2023 University Room A: Can you still hear us?
01:24:35 Kimberly.Smith@mtsu.edu: Yes
01:24:39 WOLFcon 2023 University Room A: Reacted to "Yes" with δỸ'
01:25:48 Wen-ying Lu (she/her): I use "Has" (i.e., Contains) and "Starts with" in Sierra often and hope FOLIO can include them without having to use the workaround.
01:26:28 Laura Daniels: those are options in the Inventory advanced search, I believe (that doesn't exist yet)
01:27:09 Kimberly.Smith@mtsu.edu: But things like Fund Codes and Expense Classes have controlled language in settings.
01:29:16 Wen-ying Lu (she/her): Great! Hi Laura!!
01:29:27 wijianen: It would also be nice if searching in Orders didn't require punctuation such as commas
01:29:52 Laura Daniels: does searching in orders require punctuation currently?
01:30:38 wijianen: yes
01:30:41 Laura Daniels: I don't think anyone is suggesting we require punctuation other than quotation marks for phrase searching
01:30:52 Laura Daniels: oh, I'd like to hear more about that, please?
01:37:14 Kimberly.Smith@mtsu.edu: Thank you all for the work you are doing!
01:37:37 wijianen: Thank you all also!
01:37:49 WOLFcon 2023 University Room A: Thank you a lot!

**Action items**

- Martina Schildt to create Jira tickets for cross-app search requirements/agreements
- Martina Schildt start a separate discussion or poll on cross-app search default: "contains" or "starts with"