<table>
<thead>
<tr>
<th>Date</th>
<th>Tester</th>
<th>Functionality</th>
<th>Observation</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020-07-01</td>
<td>Felix Hemme (ZBW)</td>
<td>Organizations: retain line breaks in the description field</td>
<td>Line breaks from the description field are visible in edit mode, but not in view mode.</td>
</tr>
<tr>
<td>2020-06-29</td>
<td>Emma Boettcher</td>
<td>Check In notes</td>
<td>Only one check in note shows without scrolling, and it’s not clear that users have to scroll to view more notes.</td>
</tr>
<tr>
<td>2020-06-16</td>
<td>Felix Hemme (ZBW)</td>
<td>Organizations: interface note table width</td>
<td>Notes on the platform are difficult to read if they are of a certain length.</td>
</tr>
<tr>
<td>2020-06-01</td>
<td>Duke ERM staff, reported by Julie Brannon</td>
<td>Organizations: UI Consistency with other FOLIO Apps</td>
<td>Users found it odd that the Organizations app includes a &quot;Summary&quot; section at the top while other apps do not have an explicitly named &quot;Summary&quot; section. Would prefer t approach for the header/top/summary section of each app.</td>
</tr>
<tr>
<td>Date</td>
<td>User Name</td>
<td>Task</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>----------------------</td>
<td>-------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>2019-12-19</td>
<td>Cornell Usability Working Group, reported by Huda Khan</td>
<td>Circulation/Access: Placing a request</td>
<td>Users asked to place a hold request for the patron given title and call number struggled to find the options to add a new hold request: the item dropdown and on the main request screen. These users also commented on the amount of information in the inventory screen that did not appear relevant to them. Additionally, thought they would lose what they had done if they clicked on “new request”. Recommendations include having a clearer way of adding a request by, for example, making the dropdown more apparent on the item record or having a button on the inventory screen for requests. The Requests app may not be directly useful for Circulation users and perhaps this app could be hidden for Circulation users. Additionally, the language for “new request” could be changed to “place request” or “save request” for more.)</td>
</tr>
<tr>
<td>2019-12-19</td>
<td>Cornell Usability Working Group, reported by Huda Khan</td>
<td>Circulation/Access: Backdating item when discharging</td>
<td>Users did find the date and time pickers but did not understand that clicking the “x” in the box would reset the process date/time. Recommendations include adding an optic clearly reset to today or now. Users also liked seeing the processed and actual times on items, although they did not see the time on all items consistently on the check in screen. Recommendations include ensuring times always show with items checked in. (See Report for more.)</td>
</tr>
<tr>
<td>2019-10-22</td>
<td>Erin Nettles</td>
<td>UI / Permissions</td>
<td>If you are a user who has no permissions and you log into FOLIO, what you see is the FOLIO homepage with the wonderful “the Future of Libraries is Open!” … and then you and there’s no error message or other feedback presented to the logged in user. I think that for institutions that use SSO, they will want to be able to present some sort of message through the GUI at this stage, whether through pop-up or a static message screen - something like “You don't have permissions to do anything, if you think that's an error, please contact _______”. That way you don't have a dead-end for the person who came in. This is in no way an MVP feature, but I think it would be desirable so wanted to send it on for input.</td>
</tr>
<tr>
<td>2019-08-16</td>
<td>Jenn Colt</td>
<td>Data import</td>
<td>The gui log shows all green as if the import works but the job execution log shows (correctly) that the import failed. This seems to happen when the problem is with posting rather than during the marc conversion. In server logs I see a 500 error indicating the instances were not saved.</td>
</tr>
<tr>
<td>201-06-20</td>
<td>Patty Wanninger</td>
<td>Inventory</td>
<td>There is a lot of information in the item record that does not appear on the three panel display. Is there a ticket for improving that display? Would be very hard to use in the inventory without having the information. Comment by Uschi Klute: This might also be a problem if a user has the permission to view the item record, but no permission to edit the item data.</td>
</tr>
<tr>
<td>2019-06-20</td>
<td>Patty Wanninger</td>
<td>Inventory</td>
<td>You can add multiple copy numbers to an item record. Isn't that contraindicated? Why would you have more than one copy number on a single item?</td>
</tr>
</tbody>
</table>
Overview: Modifying the search indexes results in broken search

Steps to Reproduce:
1. Log into https://bugfest.folio.ebsco.com as folio
2. Go to Inventory
3. In the Search and Filter pane, select "All (title, contributor, identifier)
4. Search for "zhang" (without the quotation marks)
5. See that 153 records have been found
6. Change the search index to "contributor" (and hit enter)

Expected Results:
The system displays all records where "zhang" is found by a search on contributor.

Actual Results:
The system displays "No results found for "zhang". Please check your spelling and filters."

Additional Information:
After resetting by clicking on "Reset all" an re-typing "zhang" in the search box you'll get the expected result. I could not find a bug in Jira that has already been filed for this it, if this is already on your radar.

Interested Parties:
Charlotte Whitt

Example 2

Steps to Reproduce:
1. Log into https://bugfest.folio.ebsco.com as folio
2. Go to Inventory
3. In the Search and Filter pane, select "All (title, contributor, identifier)
4. Search for "zhang yan" (without the quotation marks)
5. See that 2 records have been found
6. Change the search index to "contributor" (and hit enter)

Expected and actual result:
The system still displays the two records because they both contain "Zhang, Yan" as contributor.

Additional Information:
Because of bug [UIIN-435] - Basic Search: Search by Contributor on partial name doesn't return results a contributor search only works if the complete contributor name is entered in the search form.

Cross-app

Steps to Reproduce:
1. Log into http://folio-snapshot-stable.aws.indexdata.com as diku_admin
2. Go to Orders
3. Create a new order and save it.
4. Click "Add PO Line"
5. Select a random Acquisition Method and Order Format
6. Switch to another app (e.g. Setting)
7. In the popup modal, click "Close without saving"
8. From the now showing Settings app, switch back to Orders

Expected Results: The system displays the orders screen and the search/filter pane, the search result (2nd pane) and the previous selected order in the detail view (3rd pane) at least the behavior expected. Martina Schmi and I would expect.

Actual Results: The systems displays an empty "Create POL" screen.

Additional Information: This bug can also be reproduced in Users and Inventory. I'm not sure if we ever talked about the expected behavior. But I would expect that we c "Create xxx" screen, if we already dismissed it.

Interested Parties: Filip Jakobsen Khalilah Gambrell
2019-03-27 Siska Humlesjö Users All staff (12 in all) testing Folio had problems with understanding that the button “Create user” in the upper right corner means “Save”.

2019-03-27 Siska Humlesjö Overall The last open record when previously using an app shouldn’t be open after using another app, this is a privacy issue.

2019-03-27 Siska Humlesjö Overall The staff found the highlighting of the app they were currently using to vague.

2019-03-27 Siska Humlesjö Users After having opened a User record and conducting a new search the previously opened user record is still open, making it confusing for the staff and easy to use the wrong record.

2019-03-27 Siska Humlesjö Users Our staff finds it hard to find and understand “Open loans” as opposed to “Closed loans”. They suggest that clicking “Loans” should display the open loans and closed loans removed or less visible.

2019-03-15 Patty Wanninger Inventory UI In looking at the mapping for the Inventory UI testers noted that the display would be much more readable if series notes (490/830) (currently an array) could display on separate lines, and if 5XX notes could display with a space between each note. Some general notes are many lines, and hard to parse. Can we write a ticket for this? Not actually a bug.

2019-03-09 Felix Hemme Inventory 1. Log into http://folio-snapshot-stable.aws.indexdata.com as diku_admin
2. Go to Inventory
3. Search for “cantatas”
4. Look at the record details and scroll down to create a holdings record
5. “Holdings” accordion is missing. “Add holdings” is displayed in the “Instance relationships” accordion.
6. The same applies for the Instance record “Anglo-Saxon”

Interested Parties: Charlotte Whitt
### Settings/Locations

**Overview:** Locations name check on uniqueness fails WHEN NAME CONTAINS QUOTATION

#### Steps to Reproduce:

1. Log into [https://folio-demo.gbv.de](https://folio-demo.gbv.de) as diku_admin
2. Go to settings / Organizations / Locations
3. Create a new location with these attributes:
   a. name = Publikationen im “Europäischen Dokumentationszentrum”
   b. code = edz
   c. discovery display name = test location
   d. service points = choose any
4. Save the new location
5. Now create a new location with identical name BUT different code. Note that no hint is given that a location with identical name already exists. Try to save. An error occurs as popup:

#### Expected Results:

The system displays the following information: “Location name must be unique”

#### Actual Results:

Location can’t be saved (which is fine), but no message is generated by the system.

#### Additional Information:

The quotation marks could cause the error. If a duplicate location Publikationen im Europäischen Dokumentationszentrum (without quotation marks) is created, the check will work.

#### Interested Parties:

- Felix Hemme

---

**09/09/2018 Uschi Vendors**

The display pane still shows the field name ERP code

#### Summary

<table>
<thead>
<tr>
<th>Name</th>
<th>Code</th>
<th>ERP Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>Otto Harrassowitz GmbH &amp; Co. KG</td>
<td>HARRA</td>
<td>G64758-74835</td>
</tr>
</tbody>
</table>

While in the edit screen the ield was renamed to Accounting Code.

Interested parties: Ann-Marie Breaux

---

**09/09/2018 Uschi Klute Vendors**

In the accordion "Agreements" the Discount is not displayed, but the agreement name is repeated.

#### Agreements

<table>
<thead>
<tr>
<th>Name</th>
<th>Discount</th>
<th>Reference URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>German Books</td>
<td>German Books</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Bibliotheksrabatt</td>
<td></td>
</tr>
</tbody>
</table>

Interested parties: Ann-Marie Breaux
8/30/2018  Felix Hemme  Settings / Inventory  Overview: Unique resource type code  
Steps to Reproduce:  
1. Log into https://folio-demo.gbv.de as diku_admin  
2. Go to settings / Inventory / Resource types  
3. Click +New to add a new resource type  
4. Enter “aaa” as resource type name and “crd” as resource type code. Please note, that the code already exists in the system.  

Expected Results: It could be either:  
- I get an error message like “The code has to be unique. Please select a new one.”  
- The record is being saved and the code could be a duplicate, because the source would be “local” instead of “discontent”.

Actual Results: Nothing happens. The new type can not be saved.  

Additional Information: See scenario 11: [UIIN-446 > Settings page. Inventory > Instances > Resource Type CLOSED]

The scenario above could also apply to “contributor type” and “formats”. I’m not able to test it, because as soon as I click on one of the two settings the systems slows down responding anymore.  

Interested Parties: Charlotte Whitt

8/22/2018  Felix Hemme  Inventory  Overview: Type of boolean operator inside a filter  
Steps to Reproduce:  
1. Log into https://folio-demo.gbv.de as diku_admin  
2. Go to inventory  
3. Select two-dimensional moving image as a resource type filter  
4. Select performed music as a resource type filter  

Expected Results: I get 0 search results.  

Actual Results: I get 3 search results (“journey through europe”, “Cantatas”, Transparent Water”)  

Additional Information: Looks like a design decision to me. At the moment multiple filters are chained with a boolean “OR”. Let’s say you have a record for a music video database that has two RDA content types (= resource types in inventory): performed music and two-dimensional moving image. You aren’t able to filter for this specific record at the moment. I propose to change to boolean “AND” or implement some kind of function to choose between “AND/OR”.  

Interested Parties: Charlotte Whitt

8/16/2018  Patty Wanninger  Users  Recently, the User search changed so rather than having two boxes, Active and Inactive, it has been restyled so there is only one box, “Include inactive users.” Because the blank page, removing the “Active users” box means you have to choose “Show inactive users” to get a list of patrons in order. You could also select a patron group, either s or does seem counter-intuitive that there is no way to simply show active users. I get the reason for the blank first screen but it makes the app unhandly.  

Additionally, there is no possibility to see inactive users only. This is important as there will no possibility to delete users in the near future. (Comment from Uschi Klute)

06 Aug 2018  Uschi Klute  Inventory  If I want to edit the instance I want to see the complete content of a field.  
The following fields are shortened if there is a common amount of characters in the field:  
- Title  
- Contributors: Name  
- Contributors: Free Text  
- Publications: Publisher  
- Publications: Place  

In particular the title can have many hundred characters, so there is the need to enlarge the input fields in general.  

Even if I have a rather short title and I want to add the subtitle I must see the complete content of the field during typing.

4/18/2018  Patty Wanninger  any  Occasionally when I working in the snapshot or testing environment, using Chrome on a Windows 10 machine, I will take an action and the screen will blank to repaint, but I can make it paint by refreshing the page. It is intermittent, though, so would be very hard to make a ticket for. Does anyone else experience this blank screen?

3/26/2018  Comment reported by Carolynne Whit  Contributor Search in Inventory and in Codex Search  At MM-SIG meeting on 3/22/2018 we talked about if we need Contributor Search in Inventory to be the name searched in direct order. Right now the name is indexed last name first, and it’s only searchable that way. The MM-SIG was not clear here: Lynn W. thought it should be fixed, and Jacquie S. thinks as long as it is clear. Search on Organizational would be as well.  
Jacqui mentioned that probably Codex Search should provide the search on contributors in direct order, while this search interface are used by all staff.
<table>
<thead>
<tr>
<th>Date</th>
<th>Reported by</th>
<th>Category</th>
<th>Description</th>
<th>Attached Images</th>
</tr>
</thead>
<tbody>
<tr>
<td>3/22/2018</td>
<td>ICs, reported by</td>
<td>Permissions</td>
<td>Having to click permissions one at a time to add to a user is awful, especially as the number of permissions grow. Would it be possible to add control-click so that you could permissions at once and then add them? And/or shift-click to add a whole list of permissions at once?</td>
<td></td>
</tr>
<tr>
<td>3/15/2018</td>
<td>Charlotte Whitt</td>
<td>Inventory</td>
<td>When an Unambiguous Match Search is followed by another Unambiguous Match, the Detailed Record does not update correctly if the reset button is not cleared between The UX indicate reset the button to the right of the search box, but this may easily be ignored by the user. Two unambiguous searches in a row is an edge case!</td>
<td><img src="Inventory.png" alt="Inventory" /></td>
</tr>
<tr>
<td>3/8/2018</td>
<td>FC reported by</td>
<td>Users display</td>
<td>We noticed in testing that when you first login to the site as diku_admin, the Users page opens with nothing checked so once you check &quot;active&quot; and see the users, you can continue to see users even if you reset the filters (&quot;x&quot; them out so nothing is selected), on the users page and when you tab and back again. Is this the expected behavior?</td>
<td><img src="STCOM-164.png" alt="STCOM-164 - Filter pane tweak" /></td>
</tr>
<tr>
<td>3/1/2018</td>
<td>Ann-Marie Breaux</td>
<td>Inventory</td>
<td>Identifier numbers in the FOLIO instance display do not have the correct labels. For example, some are being labeled as ISBNs when they are definitely not. See attached.</td>
<td>![Identifiers In Inventory Recs.pdf](Identifiers In Inventory Recs.pdf)</td>
</tr>
<tr>
<td>2/22/2018</td>
<td>Patty Wanninger</td>
<td>Searching items</td>
<td>It seems to me there should be a barcode search in inventory now that it is merged with item functionality. Right now, it seems the only barcode search of items is in checkin requests. A library will often have only a barcode and wants to be able to enter or scan it as a search key.</td>
<td></td>
</tr>
<tr>
<td>2/21/2018</td>
<td>Patty Wanninger</td>
<td>Testing</td>
<td>It sure would be nice to get exactly the same set of Users and Item data that gets loaded everytime there is a rebuild so we can use the same data and record URLs. Currently user names, user uuids, user barcodes and instance/holding/item uuids are different after rebuild (item barcode is the same but does not have a url).</td>
<td></td>
</tr>
<tr>
<td>2/20/18</td>
<td>FSE IC team</td>
<td>Users</td>
<td>It would be very nice to be able to facet a user search by:Open loans, Active Requests, Proxy/Sponsor/User permissions (if they have any)</td>
<td></td>
</tr>
<tr>
<td>2/20/18</td>
<td>FSE IC Team</td>
<td>Users</td>
<td>When viewing a list of users, all columns sort ascending/descending properly except the inactive/active column (the first column). Enter this as a bug?</td>
<td></td>
</tr>
</tbody>
</table>
1.12.2018 FSE IC team reported by Patty Wanninger

Users

Proxy

we proposed labeling the tab itself Sponsor/Proxy instead of just Proxy. Also, we would like the "Sponsors" tab to be labeled something like "User is Proxy for" and the "Pro is Sponsor of."

Or some similar language that implies

Proxy = This people listed in this section are proxies for this User

Sponsor = The current User is a proxy for the people listed in this section

Add'l notes from Ann-Marie: these headers (Sponsor/Proxy) are very confusing, so if they can be relabeled or shown in a graphical way (who is the sponsor, who is the proxy)

At the least, in the individual user, it needs to be super-clear (on the subordinate) that I am sponsored by (important person) and (on the higher-level person) that I have this proxies. "By" and "For" seem like important words to make the relationship between the 2 users more clear.

1.12.2018 FSE IC team reported by Patty Wanninger

User

Proxy

We note that currently, you can set up a Sponsor or a Proxy with a date in the past. Perhaps there are use cases to do so, but we think it would be nice to get a pop-up that in the past.

2.2.2108 FSE IC Team, reported by Patty Wanninger

Requests

In testing https://issues.folio.org/browse/UIREQ-47?filter=10466, we discovered that currently you must fill in an item before you can look for a requestor. Often, a staff menu

know item when doing a request, or wants to place the request at the title level and any available copy will do. So it's our opinion that you should be able to start a request attach the requestor to it, or by requestor, and attach an item to that person. Also, it might be necessary to be able to search items by something other than a barcode, beca

use above, sometimes you don't know the number or you want a title-level hold.

Also, if you clear the field of an item that is currently displayed, it does not clear the details of that item, which is confusing. What happens is a red letter note appears under says, "Please select an item,", but the ghost text says "Please scan or enter an item." So the red text at least should say, "Please scan or enter an item."

2/14/18 FSE IC Team  Ann-Marie Breaux

Navigation between Requests and Users

UX Concern:

• When you move away from an app, and then come back to it, FOLIO seems to leave the app in the last display state it was.

• That means when you click a user name hotlink in the referring app (in this case, the requests app), you get inconsistent results. One time, the tri-pane with user info pane
time, the user list, with no user info pane.

• That seems like a problem.

Screenshots and more explanation in the attached PPT.