Settings - Notes

Information in italics is intended to provide guidance while writing documentation and in general should be removed when a doc is at a v.1 stage. The italics are suggestions to help guide what might go in a particular section. If you feel a section does not apply to the app or feature, please keep the section but just add that it does not apply. If you feel it makes more sense for your documentation, you can move sections up and down.

Purpose

This area of settings provides tenant-level options for Notes.

Notes is a reusable component that is implemented in the following FOLIO apps:

- eHoldings
- eUsage
- Licenses
- Users

It allows staff to add notes to individual records in those apps.

Notes have associated types that can be used to categorize the note. This area of Settings is where you configure note types.

Types are applicable across the tenant level, not the app level. That means that types can be used in different apps, even if they were created with a particular app in mind.

Permissions

Describe permissions that apply to the app or section you are outlining. Include default permissions and permission sets; dependencies that exist with permissions in other apps or parts of FOLIO.

Describe action-based permissions (if any) that apply to the app or section you are outlining, including permission dependencies and associated workflows.

Describe what each permission does, in language accessible to non-IT library staff.

- Settings (notes): display list of settings pages
  This name is not very descriptive - needs more investigation

UX/UI

Describe out of the box fields, including designed purpose, data requirements and validation, dependencies between fields.

Describe out of the box accordion menus, including purpose of the menus, customization options, and associated permission controls (if any)

Describe any workflows available through navigation menus, including purpose of the workflow, customization options, and associated permission controls.

Searching

Describe pathways for searching in the app/feature through the UI.

Describe fields that are indexed in the back end specifically for searching

Describe any advanced searching features and how they would work.

Functional workflows

Describe available tasks that can be conducted in the app. To document those tasks, create a new page and link it to this page.

Describe action-based permissions that are connected to these functional workflows, if any.

Reporting

Describe available in-app reports, including parameters for the reports, and associated permissions.

If there are developed LDP reports/queries for this app/area of FOLIO, describe those reports as well.

List any fields that may not be available in the LDP (e.g., for privacy reasons.)

Integrations

Describe any APIs that interact with the app. Provide links to the API/module information in Github.

Describe integrations that individual libraries may wish to develop for this app/area of FOLIO, if relevant.

If existing integrations have been developed by adopting libraries, provide links to the integration in Github or wherever the information can be found.

Describe and include any permanent links such as a link structure to records, searches, etc

Considerations for Implementation
Describe decisions or implications that need to be considered when implementing this feature.

Include topics such as order of operations during implementation or affects of implementing in a certain way.