Supplementary properties and Agreements
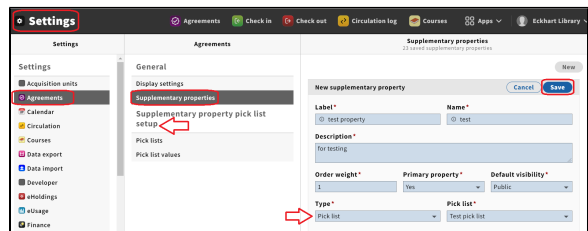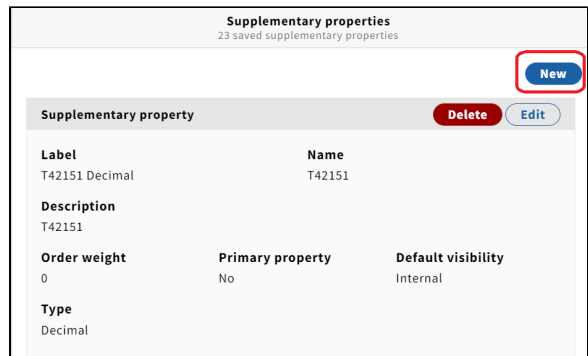
Supplementary properties

Supplementary properties are configured in the Agreements section of the Settings app under Supplementary properties.

- **Property.** A property relevant to the agreement, for example, the authentication method used to access the material covered by the agreement.
- **Value.** The definition of, or answer to, the supplementary property.
- **Visibility.** To indicate whether the supplementary property should display internally (just within FOLIO), or externally to the public through, for example, your catalog.
- **Internal note.** A note about the term that displays internally to FOLIO users.
- **Public note.** A note about the term that displays externally to the public.
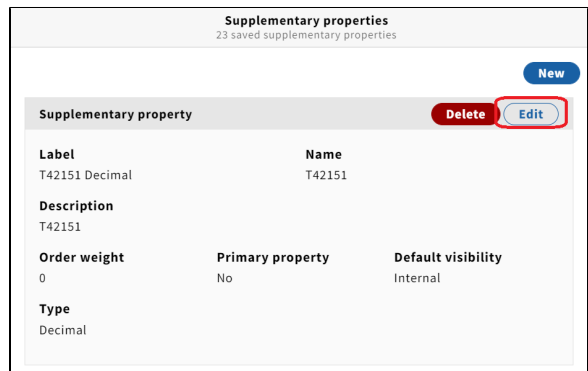
Creating a supplementary property

Steps

1	Go to the Settings app
2	Click on the Agreement sections, then Supplementary properties
3	Click the "New" button
4	Fill out the required (asterisked) fields

*Order weight determines in what order your properties will appear in your agreements.

*Primary property determines whether the property will appear by default in your agreements, or whether it will be available by clicking an add "optional property" button.

*If you select Type > Pick list, a Pick list dropdown menu will become available and you will need to select pick list. Pick lists can be created and edited under the Supplementary property pick list set up section.

Expected Result

Save button becomes active |
| 5 | Click Save

Expected Result

Supplementary property is saved and displayed with correct information and Delete and Edit buttons |

Editing supplementary properties

1	Go to the Settings app
2	Click on the Agreement sections, then Supplementary properties
3	Click the Edit button next to the supplementary property you wish to edit

Result: the property will enter edit mode |
| 4 | Make any changes |
| 5 | Click the Save button |

Deleting supplementary properties

1	Go to the Settings app
2	Click on the Agreement sections, then Supplementary properties
3	Click the Delete button next to the supplementary property you wish to edit Result: a delete popup will appear
4	Click Delete in the delete popup

Adding a primary supplementary property to an agreement

Steps

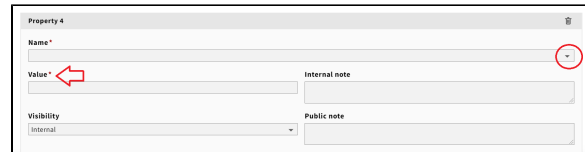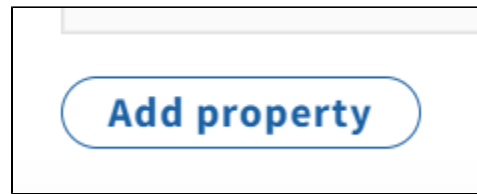| 1	Open Agreement app and select agreement Result: agreement record opens
2	Edit agreement by clicking on the blue Edit button and navigate to "Supplementary properties" section
3	Complete the Value field of a supplementary property *The value field can be text, a picklist, or an integer depending on how the property was set up in the Settings app. *You can also add a public or internal note, and determine whether the property will display internally or publicly.
4	Click "Save and Close" Expected Result Agreement is saved successfully.

To remove a primary property:

Find the primary property and remove the content of the "Value" (or choose "Not set" if a pick list property). The property itself won't be removed from the agreement record, but without a value set, it won't display publicly.

Adding an optional supplementary property to an agreement

- You can also add an optional supplementary property by clicking the "Add property" button below the primary properties.
- Select the optional property you wish to add from the Name dropdown menu, and complete the Value field (required).
- Click "Save & close."
- Optional properties are established in the Settings app. They are properties not marked as "primary."
- You can delete an optional property

  by clicking on the trash can icon next to the property name and it will be removed the agreement record.

Filter Agreement results by supplementary properties

- See Searching or filtering for an Agreement > Supplementary properties