

License terms: adding, editing, deleting, and filtering by terms

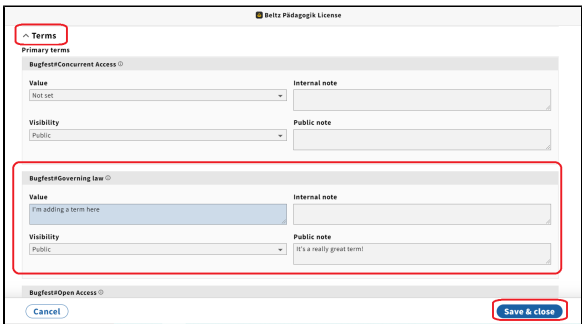
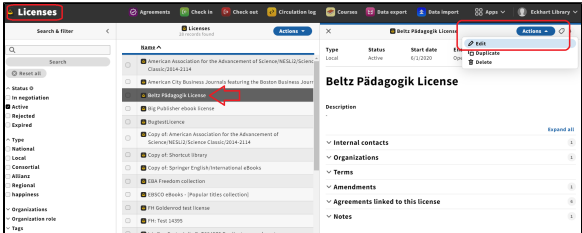
Terms are configured in the Licenses section of the Settings app under Terms and License term pick list setup.

- **Terms.** Terms of use relevant to the license.
- **Value.** The definition of, or answer to, the term. For example, the Value of the term “Concurrent Users” might be “5,” as in the license permits 5 concurrent users.
- **Visibility.** To indicate whether the term 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.

Add a term to a license

Steps

1	Open Licenses app and select the license
2	Edit License and navigate to “Terms” section
3	Complete the Value field. This could be text, an integer, or selecting from a dropdown menu. <ul style="list-style-type: none">• You can also add an internal or public note, and indicate whether you want the term to appear publicly (in the catalog).
4	Click “Save and Close”
Expected Result	
License is saved successfully.	

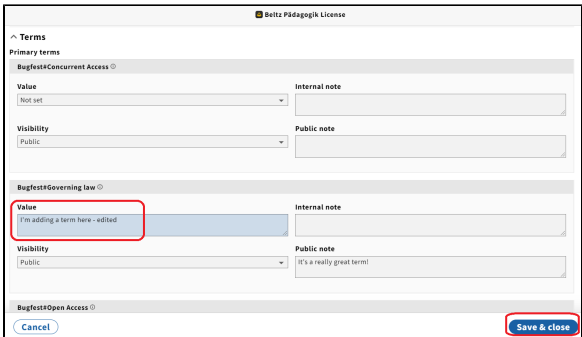


Edit a license term

Steps

1	Choose app "Licenses" Expected Result Records of licenses are shown
2	choose any license Expected Result features of license are shown
3	click button "edit" (under Actions dropdown menu) Expected Result list of changeable features is shown
4	scroll to terms and change desired feature and click "save and close" Expected Result change is shown in the list of terms

- See screenshots above for steps 1-3.



Delete a license term

Steps

1	select app "Licenses" Expected Result list of records and "search and filter"-option opens
2	choose one of the records shown in list Expected Result features of record are shown in right column
3	click on blue button "edit" (under Actions dropdown menu) Expected Result changeable fields are shown
4	scroll to "terms" and select one term and choose "not set" and click "save & close" <ul style="list-style-type: none"> You can "delete" a primary term by removing the content from the Value field, either by changing the dropdown menu to Not set, or removing text from the Value text box. Expected Result input of term is deleted in list

- See screenshots from "Add a term to a license" for steps 1-3.

Remove an optional term value from an license

- Unlike primary terms, optional terms can be deleted in their entirety. A primary term's value can be blank, but with an optional term, the term itself can be removed from the license record.

Steps

1	Open License app and select a license
2	Click Edit button and navigate to "Terms" section
3	Find an optional (not primary) term with a set value and click the trash icon on the card
4	Click "Save and Close" Expected Result License is saved successfully.

- See screenshots from "Add a term to a license" for steps 1-2.

Filter licenses by terms

Steps

1	Open Licenses app
2	In search & filter panel navigate to "Terms" accordion and open it Expected Result See "Edit Terms filters" button
3	Click "Edit term filters" button Expected Result See Terms filter builder
4	Choose term from Term dropdown menu

5	Set Comparator and Value <ul style="list-style-type: none"> You can continue to build your filter by clicking "Add rule."
6	Click "Apply" <p>Expected Result</p> <p>See licenses containing the term filter builder you set</p>

The screenshot shows a 'Term filter builder' dialog box. At the top, the title bar says 'Term filter builder'. Inside the dialog, there's a section for 'Term filter 1'. Under 'Term *', the text 'Walk-in access permitted?' is entered. Below this, the 'Comparator *' is set to 'is'. To the right, the 'Value *' dropdown menu is open, showing options: 'Yes', 'No', and 'Other (see notes)'. The 'Yes' option is highlighted. At the bottom of the dialog, there are buttons for 'Add rule', 'Add term filter', 'Cancel', and 'Apply'. The 'Apply' button is circled in red. The background of the application window shows a list of 'Amendments'.