

Copy of FILTERING SYSTEM

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Rule

Note:

The system works using combined filters:

- Within the same group it acts as a union
- Between different groups it becomes an exclusion



RULES AND VOCABULARY

VOCABULARY

- Ultimate filter**
User have option to apply their filter all over the new MFF
- Default Filters:**
All filters unless defined otherwise :
 - predefined filter by business
 - predefined filter by user
- General Filters:**
Programmes, Calls, Rounds, Fields, Key actions, Action types
- Common Filters:**
Status, State, OID, Element Code, NA, Country
- Specific Filters:**
Grant, Process
- State/Status link:**
links present on the home page
e.g. DRAFT / SUBMITTED / SHARED WITH ME etc...
- Predefined filter:**
Set of filters pedefined locally for a page by business or by user.

e.g.

APPLICATIONS	APPLICATIONS	ASSESSMENTS
<div>Draft applications: 2</div> <div>Submitted applications: 7</div> <div>In reception: 3(7%)</div> <div>In eligibility check: 3(3%)</div> <div>Ready for assessment: 3</div> <div>Number of Experts: 3</div> <div>Applications assigned to experts: 3(6%)</div> <div>In assessment: 3(15%)</div> <div>Assessed: 3(7%)</div> <div>Under organisation validation (OID)</div> <div>Under financial evaluation: 3(3%)</div> <div>Ready for selection committee: 3(2%)</div> <div>Ready for contract signing</div>	<div>Submitted applications: 4</div> <div>Participating projects: 12</div> <div>Applications shared with me: 11</div> <div>Applications to be assessed: 3</div> <div>Assessed applications: 3</div>	<div>Assessments - Pending</div> <div>Total number of applications, interim reports and final reports to be assessed: 34</div> <div>Applications: 37</div> <div>Interim reports: 3</div> <div>Final reports: 4</div> <div>Assessments - In progress</div> <div>Total number of applications, interim reports and final reports to be assessed: 12</div> <div>Applications: 10</div> <div>Interim reports: 2</div> <div>Final reports: 0</div> <div>View past, completed assessments</div>

RULES

Filters on the Search Filter Columns

- If user as no rights to see a type of items**
e.g. user as no access to KA3 : The column won't display the KA3 filters
- Filter label**
It should be translated based on the user language
- The search filter bar**
As a user I should be able to search on every type of elements (number, code, ids, text, email etc.)
As a user I should be able to transform my several searches on filters.

Filter/pills present on the Home page

- When user filters his Home page**
He should be able to save his filters with as predefined filter or default filter.
He should be able to select "apply this filter to all my overview pages (Ultimate filter)", it apply only to the overview page which has no predefined filter as a default filter.

Filter/pills present on the Overview page

- By default**
An Overview page is not filtered, users sees every items
- User comes from the Main Menu**
The filters applied as a default by a user to an overview page overwrite the home page filters (default or predefined)
The filters applied as a default by a user to an overview pages overwrite the all platform filters (at anytime)
- User comes from states/status link**
Whatever filter from general filters is applied to obtain the states/status link will be present on the overview page when user lands on it.
Remark: The home page has no search bar.
- User comes from another overview page**
The filter applied to an overview page belong to that overview page. So : no heritage between overview pages.

BEHAVIOUR

- Selected criteria: All programmes 2024 All Rounds Reset All

- When active filter is a **PREDEFINED SET OF FILTERS** (here Super Name) the pills displayed has a different style, the result, feedback message and the tooltip are :

Active filters:
Reset All

Super Name

You are currently using the "Super Name" saved filter

Tooltip:

Super Name: Erasmus+, KA1 - Learning Mobility of Individuals, KA2 - Cooperation for Innovation and the Exchange of Good Practices, DRAFT, 2021.

Super Name

- When user select a **PREDEFINED SET OF FILTERS** then **DESELECT A FILTER**, the result, the pop'up and feedback message are:

- The predefined filter pills disappear.
- All the filters composing the predefined filter appears (except the one deselected)
- The warning feedback message appears.

⚠ The current filter has changed

- When user select a **PREDEFINED SET OF FILTERS** then **SELECT OTHER FILTERS**, the result, the pop'up and feedback message are:

Active filters:
Reset All

Super Name Erasmus+ 2021 All rounds KA101 - School education staff mobility All fields

⚠ The current filter has changed

- When user select a **PREDEFINED SET OF FILTERS** then **SELECT OTHER FILTERS** (modify the filters) and click on the dropdown button Save my filter: "Overwrite": a ux-message appears to warn him and make him confirm

WARNING

⚠

The saved filter "Super Name" is about to be overwrite
Do you want to continus?

NO YES

- The button "Delete"

Delete

The button "Delete" is disable until the user **SAVE A SET OF FILTERS** or **PREDEFINED SET OF FILTERS**

WARNING

⚠

The saved filter "Super Name" is about to be deleted
Do you want to continus?


NO YES

- Feedback messages:

The feedback message has to be translate in all the languages.

icons: fa-exclamation-triangle / fa-exclamation-circle / fa-check / fa-times

Actions	When it appears	Result
By default		🕒 You are currently using the "default filter"
◦ user didn't create any "saved filters"	◦ As long as user used the default filter for the page.	
◦ user created "super name" filter saved	◦ As soon as user use an existing "saved filter" ◦ As long as this user use only the the super name saved filter	🕒 You are currently using the "Super Name" saved filter
◦ user use his saved filter and add or remove filters from it.	◦ As soon as the user click on Filter Column element ◦ As soon as user start filtering (add or remove) from a "saved filters"	⚠ The current filter has changed
◦ user set up a "saved filters"	◦ As soon user clicks on "save"	✓ Your filters has been saved
◦ user select an existing "saved filters" and set it up as default for the page	◦ As soon as user set up and existing "saved filters" as default ◦ <i>Note the user should be able to set up a set of pills as default filter without creating name. so the pills he saved will be :</i>	✓ The current filters as been set up as a default
◦ user switch between "saved filters".	◦ As soon as the user select another saved filter in the dropdown	⚠ You are currently using the "My second super name" filters
◦ user choose an existing name for his "saved filters"	◦ As soon as the user clicks on save	Save new active filter Existing name This name already exist https://eui.ecdevops.eu/eui-showcase-ux-7.x/app-style-guide/components/ux-control-feedback
◦ user wants to delete an existing "saved filters" (e.g. Super Name)	◦ As soon as user clicks on "delete"	WARNING ⚠ The saved filter "Super Name" is about to be deleted Do you want to continus? NO YES

		https://eui.ecdevops.eu/eui-showcase-ux-7.x/app-style-guide/components/ux-dynamic-message-box/default
◦ user confirms deleting a saved filter	◦ As soon as a user clicks on YES	✓ The filter saved as been deleted
◦ user wants to overwrite an existing "saved filters" (e.g. Super Name)	◦ As soon as user clicks on "overwrite"	<div><div>WARNING</div><div> The saved filter "Super Name" is about to be overwrite Do you want to continus?</div><div><div>NO</div><div>YES</div></div></div> https://eui.ecdevops.eu/eui-showcase-ux-7.x/app-style-guide/components/ux-dynamic-message-box/default
◦ user confirms overwriting a saved filter	◦ As soon as a user clicks on YES	✓ "Super name" has been modified

• **Reset all:**
The reset all suppress all the criteria and comes back to the default define for the page (by the user or by the system).
Selected criteria: [All programmes](#) [2024](#) [All Rounds](#)
[Reset All](#)

QUICK FILTERS SEARCH BAR

• **Button**
Primary class.

• **Features:**
User should be able to search for **free text, Code, ID, email, number (and not in a unique way)**.
e.g.

Quick filters

• **Search for**
User should be able to Search/Filter on all the data of the results found.

• **Behaviour:**
When the user press "run" : **WHAT EVER THE USER TAPE INSIDE THE BAR BECOME A FILTER AFTER PRESSING RUN OR AFTER CLICKS ON THE SEARCH ICON**
e.g.
Active filters: [Free text I tape on the search bar](#) [KA203-FB01DD23](#) [E10000007](#) [E10000036](#)
[Reset All](#)

COMMON FILTERS

• **ux-form-group_label**
Please have the form group label with the plural mark Programmes, Calls, Rounds

• **btn classes :**
Please have the classes: btn btn-small ux-button btn-outline-primary **m-1** ux-button--with-label

• **Remark:**
Please don't have **Calls** and **Programmes** under btn-sm classes (except for rounds)

• **For info :**
m-1 is the bootstrap class for margin:1.

• **Screen capture:**

Programmes

All

Erasmus+

European Solidarity Corps

Calls

All

2021

2022

Rounds

All

1

2

3

PROGRAMMES

• **User case:**
User select "Erasmus+" then "European Solidarity Corps"
Result:
Active filters: [Erasmus+](#) [European Solidarity Corps](#)
[Reset all](#)

• **Only If the user select All :**
[All programmes](#)

CALLS

• **User case:**
User select "2022" then "2021"
Result:
Active filters: [2022](#) [2021](#)
[Reset all](#)

• **Only If the user select All :**
[All calls](#)

ROUNDS

• **User case:**
User select "Round 2" then "Round 1" then "Round 3"

Result:

Active filters:
Reset all

Round: 2

Round: 1

Round: 3

- Only If the user select All:

All rounds

KEY ACTIONS

- Default state of Key actions filter

Key Actions

Key Actions

- After selection, the dropdown show the number of item selected and the pill "All Key Actions"

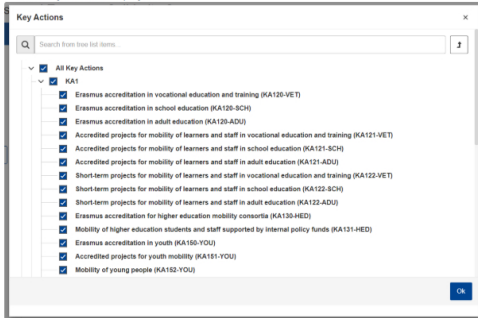
Key Actions

31 items selected

All Key Actions

- When Select All is selected :

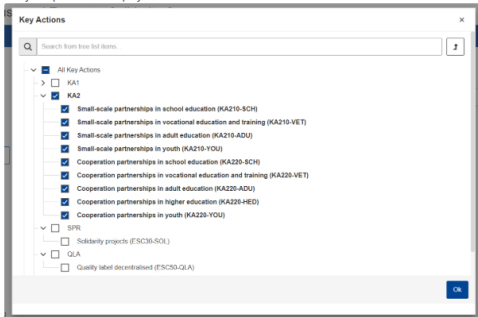
- Pills All key action is displayed



All key actions

- If user select the KA2 checkboxes:

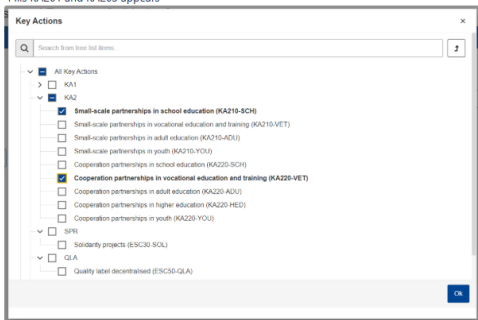
- All key actions is deselected
- the KA2 checkboxes is checked
- Only the pills KA2 is displayed.



KA2 - Cooperation for innovation and the exchange of good practices

- If user select KA210-SCH and KA220-VET:

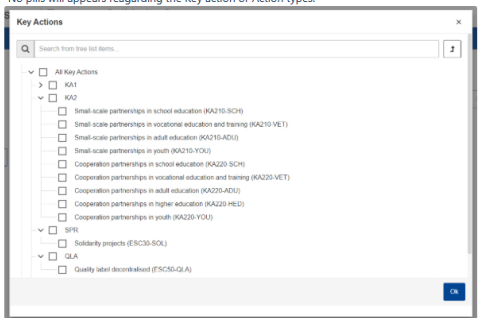
- KA2 is deselected
- Pills KA201 and KA203 appears



KA210-SCH KA220-VET

- If user deselect every check boxes:

- The system won't filter on any key actions or action types
- No pills will appears regarding the Key action or Action types.



- User case:

I hear select "KA1 - Learning Mobility of Individuals" then "KA2 - Cooperation for innovation and the exchange of good practices" then "KA3 - Support for policy reform"

Active filters:
Reset all

KA1 - Learning Mobility of Individuals

KA2 - Cooperation for innovation and the exchange of good practices

KA3 - Support for policy reform

User case:

User select "KA101 - School education staff mobility" then "KA108 - Accreditation of Higher Education Mobility Consortia"

Active filters:
Reset all

KA101 - School education staff mobility

KA108 - Accreditation of Higher Education Mobility Consortia

User case:

User select "KA1 - Learning Mobility of Individuals" after previous choice it becomes

Result:

KA1 - Learning Mobility of Individuals

User case:

User has selected "KA2 - Cooperation for Innovation and the Exchange of Good Practices" then select "KA229 - School Exchange Partnerships"

Result:

Active filters:
Reset All

KA229 - School Exchange Partnerships

User case:

Only If the user select All key action:

All key actions

FIELDS

Fields

☐ School Education

☐ Adult Education

☐ Vocational Education and Training

☐ Higher Education

☐ Youth

☐ Sport

User case:

User select "Adult Education"

Result:

Fields

☐ School Education

☒ Adult Education

☐ Vocational Education and Training

☐ Higher Education

☐ Youth

☐ Sport

Adult Education

If all selected the checkboxes are selected the pills "All Fields" will appears
if none of the checkboxes is selected : The system will not display the pills "All Field" but not filtered on the fields either.

Fields

☒ School Education

☒ Adult Education

☒ Vocational Education and Train...

☒ Higher Education

☒ Youth

☒ Sport

All Fields

STATES AND STATUS

Default

States

☐ SUBMITTED

☐ Submitted

☐ DRAFT

☐ Not submitted

☐ Reopened

☐ Reopened by NA (only ...

☐ Reopened by NA (edita...

☐ UNSUBMITTED

☐ Deleted

☐ Deadline Expired

☐ Canceled

After selection

States

☒ SUBMITTED

☒ Submitted

☒ DRAFT

☒ Not submitted

☐ Reopened

☒ Reopened by NA (onl...

☐ Reopened by NA (edita...

☒ UNSUBMITTED

☒ Deleted

SUBMITTED (x) Not submitted (x) Reopened by NA (only submission allowed) (x) Deleted (x)

No labels