

1.6 HRE IMPLEMENTATION STAGE PLANS

Original draft 2017-04-18 - R Lamacraft and D Ferguson

Revised 2021-03-12 - D Ferguson

1. HRE v0.1: Core with reduced menu, some services and features

1.1. Summary: The initial HRE stage that builds the infrastructure of the application. It includes operations on HRE Projects.

1.2. Aims and Overview:

- 1.2.1. CLIENT - Build the skeleton of the HRE Client application with layered architecture
- 1.2.2. SERVER – Allow for extension to the Server environment
- 1.2.3. Following will be within the same computer
- 1.2.4. From actions using the GUI:
 - 1.2.4.1. Create and edit settings for a database
 - 1.2.4.2. Create an empty HRE database
 - 1.2.4.3. Backup, Restore, Delete and Rename that database
 - 1.2.4.4. Create database tables for all elements of Person, Location Names.

1.3. Outcome: Creation of the initial HRE core. This will be used to validate the vertical path through all architecture layers from the user interface to the detailed updating of database records. It is a test bed for various technologies.

1.4. CLIENT - Presentation Layer:

Build with action code for a reduced set of the Main Menu with following entries:

1.4.1. Project Menu:

- 1.4.1.1. Open Project
- 1.4.1.2. Create New Project
- 1.4.1.3. Project Backup
- 1.4.1.4. Project Restore
- 1.4.1.5. Project Close
- 1.4.1.6. Project Copy As
- 1.4.1.7. Project Rename
- 1.4.1.8. Project Delete
- 1.4.1.9. Project Summary
- 1.4.1.10. Close and Exit
- 1.4.1.11. Display Recent Project List

1.4.2. Person Menu:

- 1.4.2.1. Select Person by...

1.4.3. Viewpoint Menu:

- 1.4.3.1. Open Person Viewpoint

1.4.4. Reports Menu:

- 1.4.4.1. Logging output

1.4.5. Tools Menu:

1.4.5.1. Settings:

- 1.4.5.1.1. User
- 1.4.5.1.2. Import from TMG (Person data only)
- 1.4.5.1.3. Administration (of Users per project)
- 1.4.5.1.4. Maintenance

1.4.6. Help Menu:

- 1.4.6.1. Help Contents
- 1.4.6.2. HRE Website (link to)
- 1.4.6.3. About HRE (splash screen)

1.5. CLIENT - Business Layer:

Build services and modules to support the above

1.6. CLIENT - DB Layer:

Build services and modules to support the above

1.7. SERVER - Head Layer:

Not applicable

1.8. SERVER - Services Layer:

Not applicable

1.9. SERVER - Database Abstraction Layer:

Not applicable

1.10. SERVER - Database Action Layer:

Not applicable

2. HRE v0.2: Add Locations and Name Styles

2.1. Summary: adds Locations and Name Styles. This stage includes the import of Person and Location Name Styles and Flags, each with their screen displays.

2.2. Aims: create an Import from TMG of the additional data

2.3. Outcome: at completion of v0.2, be able to:

- 2.3.1. Display a list of Persons in the HRE database
- 2.3.2. Edit Person Names and Person Name Styles
- 2.3.3. Display a list of Locations in the HRE database
- 2.3.4. Edit Location Names and Location Name Styles
- 2.3.5. Import a list of Persons and their names and name styles from a TMG project
- 2.3.6. Import a list of Locations and their names and name styles from a TMG project

2.4. CLIENT - Presentation Layer:

Add action code for the following added entries:

2.4.1. Person Menu:

- 2.4.1.1. Manage Person
- 2.4.1.2. Administer Person Name Style Definitions
- 2.4.1.3. Administer all Person Flags
- 2.4.1.4. Administer all Person Notepads
- 2.4.1.5. Administer all Person Accents
- 2.4.1.6. Show Recent Use List

2.4.2. Viewpoint Menu:

- 2.4.2.1. Open Location Viewpoint

2.4.3. Where & When Menu:

2.4.3.1. Location Sub Menu:

- 2.4.3.1.1. Select Location by...
- 2.4.3.1.2. Manage Location
- 2.4.3.1.3. Administer Person Name Style Definitions
- 2.4.3.1.4. Show Recent Use List

2.5. CLIENT - Business Layer:

Build services and modules to support the above

2.6. CLIENT - DB Layer:

Build services and modules to support the above

2.7. SERVER – All Layers:

Nothing new

3. HRE v0.3: Add Events and Tasks

3.1. Summary: adds HRE Events and Tasks with their screen displays. It also extends the TMG importing to include the import and conversion of Event data to HRE format

3.2. Aims: to add Events and Tasks to v0.2

3.3. Outcome: at the completion of v0.3, HRE will operate on Persons, Events, Tasks, Locations

3.4. CLIENT - Presentation Layer:

Add action code for the following added entries:

3.4.1. Events & Tasks head item: Event Sub-Menu

- 3.4.1.1. Select Event by...
- 3.4.1.2. Recent Use
- 3.4.1.3. Manage Events
- 3.4.1.4. Manage Event Flags
- 3.4.1.5. Manage Event Notepads

3.4.2. Events & Tasks head item: Task Sub-Menu

- 3.4.2.1. Select Task by...
- 3.4.2.2. Recent Use
- 3.4.2.3. Manage Tasks

3.4.3. Viewpoint Menu:

- 3.4.3.1. Open Event Viewpoint

3.4.4. Where & When head item: Historical Date Sub-Menu: (addition)

- 3.4.4.1. Date Converter
- 3.4.4.2. Date Calculator

3.4.5. Tools Menu:

- 3.4.5.1. Add the following to Settings:
 - 3.4.5.1.1. Events
 - 3.4.5.1.2. Tasks
 - 3.4.5.1.3. Locations

3.5. CLIENT - Business Layer:

Build services and modules to support the above

3.6. CLIENT - DB Layer:

Build services and modules to support the above

3.7. SERVER – All Layers:

Nothing new

4. HRE v0.4: Add Citations, Sources, Repositories

4.1. Summary: adds HRE Sources, Repositories and Citations with their screen displays. It also extends the TMG importing to include the conversion of that TMG data into HRE format

4.2. Aims:

- 4.2.1. To add Citations, Sources and Repositories to v0.3
- 4.2.2. To extend the TMG import to Citations, Sources and repositories from TMG projects

4.3. Outcome: at completion of v0.4, the TMG import should be able to import all TMG data except Images, External Files, DNA and sundry data like merge exclusions, focus groups, etc

4.4. CLIENT - Presentation Layer:

Add action code for the following added entries:

4.4.1. Evidence head item: Source Sub-Menu:

- 4.4.1.1. Select Source by...
- 4.4.1.2. Recent Use
- 4.4.1.3. Pick List
- 4.4.1.4. Manage Sources
- 4.4.1.5. Manage Source Name Style Definitions
- 4.4.1.6. Manage Source to Repository Links
- 4.4.1.7. Manage Source Flags
- 4.4.1.8. Manage Source Notepads

4.4.2. Evidence head item: Repository Sub-Menu:

- 4.4.2.1. Select Repository by...
- 4.4.2.2. Pick List
- 4.4.2.3. Recent Use
- 4.4.2.4. Manage Repositories
- 4.4.2.5. Manage Repository Flags
- 4.4.2.6. Manage Repository Notepads
- 4.4.2.7. Manage Repository to Source Links
- 4.4.2.8. Manage Source Repository Link Flags
- 4.4.2.9. Manage Source Repository Link Notepads

4.4.3. Evidence head item: Citation Sub-Menu:

- 4.4.3.1. Select Ctations by...
- 4.4.3.2. Pick List
- 4.4.3.3. Recent Use
- 4.4.3.4. Manage Citations
- 4.4.3.5. Manage Citation Flags
- 4.4.3.6. Manage Citation Notepads

4.4.4. Tools Menu

- 4.4.4.1. Add the following to Settings:
 - 4.4.4.1.1. Sources
 - 4.4.4.1.2. Source Name Styles
 - 4.4.4.1.3. Repositories
 - 4.4.4.1.4. Repository to Source Links

4.5. CLIENT - Business Layer:

Build services and modules to support the above

4.6. CLIENT - DB Layer:

Build services and modules to support the above

4.7. SERVER – All Layers:

Nothing new

5. HRE v0.5: Add Images, External Files

5.1. Summary: adds Filters, Subsets, Images, External Files and Internal Texts with their screen displays. It also extends the TMG importing to include the conversion of the available TMG data into HRE formats. This completes the TMG Importing module

5.2. Aims:

- 5.2.1. Add construction and execution of filters
- 5.2.2. Add the selection of subsets and operations on them
- 5.2.3. To add any remaining data types which are represented in a TMG project.

5.3. Outcome:

At completion of v0.5, be able to:

- 5.3.1. Import all data from TMG projects
- 5.3.2. View all TMG imported data.

5.4. CLIENT - Presentation Layer:

- 5.4.1. Filters: extend existing simple filters on all screens to allow for the creation, editing saving and manipulation of extended filter definitions
- 5.4.2. Subsets: add the ability on all relevant screens to create, edit, save and manipulate subset definitions
- 5.4.3. **Evidence head item: Image Sub-Menu:**
 - 5.4.3.1. Select by Image-ID
 - 5.4.3.2. Manage Images
 - 5.4.3.3. Manage Image Flags
 - 5.4.3.4. Manage Image Notepads

- 5.4.3.5. Select links to:
 - 5.4.3.5.1. Person
 - 5.4.3.5.2. Location
 - 5.4.3.5.3. Source
 - 5.4.3.5.4. Repository
 - 5.4.3.5.5. Citation
 - 5.4.3.5.6. Event
 - 5.4.3.5.7. Task

- 5.4.3.6. Link Manage (Select, Add, Delete, Edit)

5.4.4. **Evidence head item: External File Sub-Menu:**

- 5.4.4.1. Select by Source-ID
- 5.4.4.2. Recent Use
- 5.4.4.3. Manage Files
- 5.4.4.4. Manage File Flags
- 5.4.4.5. Manage File Notepads
- 5.4.4.6. Select links to:
 - 5.4.4.6.1. Person
 - 5.4.4.6.2. Location
 - 5.4.4.6.3. Occasion
 - 5.4.4.6.4. Source
 - 5.4.4.6.5. Repository
 - 5.4.4.6.6. Citation
 - 5.4.4.6.7. Event
 - 5.4.4.6.8. Task

- 5.4.4.7. Link Management

5.4.5. **Evidence head item: Internal Text Sub-Menu:**

- 5.4.5.1. Select by ...
- 5.4.5.2. Recent Use
- 5.4.5.3. Manage Internal Text
- 5.4.5.4. Manage Internal Text Flags
- 5.4.5.5. Manage Internal Text Notepads
- 5.4.5.6. Select links to:
 - 5.4.5.6.1. Person
 - 5.4.5.6.2. Location
 - 5.4.5.6.3. Occasion
 - 5.4.5.6.4. Source
 - 5.4.5.6.5. Repository
 - 5.4.5.6.6. Citation
 - 5.4.5.6.7. Event
 - 5.4.5.6.8. Task

- 5.4.5.7. Link Management

5.5. CLIENT - Business Layer:

Build services and modules to support the above

5.6. CLIENT - DB Layer:

Build services and modules to support the above

5.7. SERVER – All Layers:

Nothing new

6. HRE v0.6: Add Basic Reports

6.1. Summary: add Tabular Reports and output in a small choice of file formats. Reports based on Genealogy-specific concepts will be added.

6.2. Aims:

- 6.2.1. Add customizable Tabular Reports for all data types
- 6.2.2. Add specialized screens for Human Genealogy

6.3. Outcome:

At completion of v0.6:

- 6.3.1. Addition of tabular reports in at least .txt or .csv format
- 6.3.2. Have the ability to create new tabular report layouts using a scripting language.

6.4. CLIENT - Presentation Layer:

Add action code for the following added entries:

6.4.1. Report Menu

- 6.4.1.1. Recently Used
- 6.4.1.2. Edit Settings (only enabled when report definition is selected)
- 6.4.1.3. Create Report (only enabled when report definition is selected)
- 6.4.1.4. 'List of' Reports:
 - 6.4.1.4.1. Persons
 - 6.4.1.4.2. Locations
 - 6.4.1.4.3. Events
 - 6.4.1.4.4. Tasks
 - 6.4.1.4.5. Sources
 - 6.4.1.4.6. Repositories
 - 6.4.1.4.7. Citations
 - 6.4.1.4.8. Images
 - 6.4.1.4.9. External Files
 - 6.4.1.4.10. Internal Texts

6.5. CLIENT - Business Layer:

Build services and modules to support the above

6.6. CLIENT - DB Layer:

Build services and modules to support the above

6.7. SERVER – All Layers:

Nothing new

7. HRE v0.7: Add more complex layout reports

7.1. Summary: add HRE Sentenced-based Reports with screen displays and output in a small choice of file formats.

7.2. Aims: add customizable sentence-based reports

7.3. Outcome: at completion of v0.7, be able to provide sentence-based reports

7.4. CLIENT - Presentation Layer:

Extent the Report Menu with more types of report and add action code for specially created reports such as:

- 7.4.1. Multi-table reports
 - 7.4.1.1. Family Group Sheet
- 7.4.2. Sentence-based reports
 - 7.4.2.1. Individual Narrative

7.5. CLIENT - Business Layer:

Build services and modules to support the above

7.6. CLIENT - DB Layer:

Build services and modules to support the above

7.7. SERVER – All Layers:

Nothing new

8. HRE v0.8: Extend Functionality to Client-Server solutions

8.1. Summary: extend all existing functionality to include client-server based HRE projects.

8.2. Aims: add client-server capability

8.3. Outcome: at completion of v0.8, be able to manage HRE project files on external server environments.

8.4. CLIENT - Presentation Layer:

Extent the Project menu screens to include server logon capability where required

8.5. CLIENT - Business Layer:

Build services and modules to support the above

8.6. CLIENT - DB Layer:

Build services and modules to support the above

8.7. SERVER – All Layers:

Build services and modules to support the above