BR_Project – Project Services

Revision history

2017-05-02	Robin Lamacraft	Original draft
2018-04-05	John Lucas + RL	Addition of Project Merge/Split commentary
2018-06-03	Don Ferguson	Removed database tables, added database # references

SCOPE

This module must be used anywhere information about a Project is created, updated or needs to be retrieved. This includes Project:

- Identity and status
- Required HRE version
- Required installed plug-ins
- User Settings
- GUI Settings
- Recent Values
- Sessions
- Backups
- Error logs
- Import origins of the records.

ACTIONS

For requests from the GUI for Project main menu items:

1. <u>Project New</u> – create an empty new project with a unique name
2. <u>Project Open</u> – open a selected Project
3. <u>Project Recent</u> – provide a list of recent Projects
4. <u>Project Copy As</u> – create a duplicate of the currently selected project with a unique name
5. <u>Project Rename</u> – rename the currently selected project
6. <u>Project Backup</u> – selectively backup the currently selected project to an external file
7. <u>Project Restore</u> – selectively restore the external file to a project of the same name
8. <u>Project Delete</u> – delete the currently selected project
9. <u>Project Import</u> – import an external project from the selected external file source into the currently created new project (needs a plugin to import files of a different data encoding)
10. <u>Project Export</u> – export the currently selected project (uses a plugin to export the currently selected project to encode the exported data to the selected format).
11. Project Merge – merging two projects (see below)
12. Project Split – splitting a project (see below).

Merge and Split actions need to be decomposed to reveal the use of other tools as part of their structure. These have a number of distinct reusable elements, as follows.

Project Merge - merging an original Project with an external Project
NOTE: The External Project may be one created by a Project Subset action.

a. With the Original Project open in HRE, write all of the External Projects records into the Original Project data base with the SET_KEY set to a unique value
b. Now compare Original Project records with the added External records and produce lists of likely duplicates in each data type. The user will need some control over the criteria for detection of duplicates in each data entity type. NOTE this is a tool that could also be used for duplicate entries in any project.

c. The user selects a possible area of duplication entries and the GUI shows the context of both local information sets. This GUI must allow the user to view detail at several levels. In some instances there will be possibility to merge the data into the Original Project, at other times there may be a need to add a link within the data records that these 2 items are possibly the same or that these 2 items are definitely distinct. This process is also useful with a single project

d. The aim should be to convert all the imported records into the Original Project database, qualified where necessary about being distinct or as being possibly identical focus entities

e. Operations (c.) and (d) will be repeated many times

Project Split or Project Subset - creating a new Project from a source Project

a. A project subset is a copy of a set of database records that can be saved as a complete project database

b. Project scope is the most difficult question. TMG's could perform a split if there were no witnesses and other links as it only related to Principals and their Events. In HRE, there are more research types of data and more links between tables. For different purposes the user is likely to want several methods of defining the scope of a project subset. Say a user selects a list of Person ID's as the basis for the subset of events where that person is referenced. That does not make sense if the selected person is a non-key associate of the event of another key associate. If an Event is included then the Citations and Sources must be in the subset project

c. Possibly, the records of all tables destined to the subset project could be initially copied in the resident HRE database with a unique SET_KEY value. That way the reuse of a say a source will be detected and that common copy will be in the subset Project

d. To convert the subset into an independent project: when the search for all relevant records has been completed, then the set of records with the unique records can be saved as a new project

e. How is the source project impacted (if this is required)? There are 2 outcomes here.
   o The records in the schema with the unique SET-KEY value are deleted leaving the original project as it was before the sub-project operation
   o The original records that have been copied to the project split outcome are deleted.

NOTE that in (e) there may be records that need be retained to maintain the integrity of the Source Project database.

USED BY
1. Any Project main menu item
2. Any Module that needs to discover or update the status of a project.

DATA CONTROLLED BY THIS MODULE
Refer to database tables **126 Projects, 103 Plugins, 131 Users, 129 Commit_Logs, 303 Viewpoint_Configs, 305 GUI_Screen_Configs**.

REQUIRED SERVICES
1. BR_GuiElement
2. BR_EntityLink
3. BR_Translation
4. BR_FieldDefinition.

WARNING CONDITIONS
1. Need details of the condition that raised the warning, example message and possible next steps.

ERROR CONDITIONS

1. Need to record the condition that raised the error, example message and possible next steps.