Module: eparties



Contact: Caleb McMahan

Team Members: Emily Hayflick, Christine Niezgoda, Nancy Hensold, Robin Delapena, Susan Mochel, Mary

Cochran, Chris McGarrity, Colleen Kingsbury, Sharon Grant

Admin Review: Kate Webbink, Janeen Jones

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SUMMARY STRINGS

```
Default: UPDATED
```

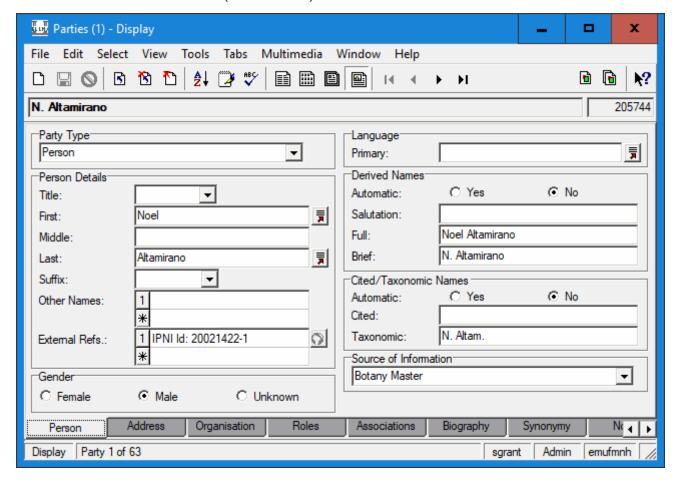
```
Summary String = "[" + NamPartyType + "] " + NamFullName + ": " + NamOrganization
      e.g.(irn 175266) = [Person] Dr. Caleb D. McMahan : Field Museum of Natural History - Fishes
Other(s):
      [NEW] Where NamParType = "Address",
             Summary String = "[" + NamPartyType + "] " + AddPostStreet + ", " + AddPostCity + ", "
             + AddPostState + ", " + AddPostCountry
             e.g. (irn 204848) = [Address] P.O. Box 281, North Newton, KS, U.S.A
      [UPDATED] Where NamParType = "Person"
             Summary String = NamFullName + ": " + NamOrganization + " - " + NamDepartment
             e.g. (irn 7124) = Ms Sharon D. Grant: Field Museum of Natural History - Technology
      [UPDATED] Where NamParType = "Organization"
             Summary String = NamOrganization + " - " + NamDepartment
             e.g. (irn 199177) = University of Guelph - Biodiversity Institute of Ontario
      [NEW] Where NamParType = "Cultural Group"
             Summary String = NamOrganization
             e.g., (irn 1827) = Mohegan Indian Tribe of Connecticut
      [NO CHANGE] Where NamParType = "Collaboration"
             Summary String = ColCollaborationName
```

Tabs

Tabs to be updated:

e.g. (irn 199889) = RI-30 Team

EXISTING TAB - Person (AllPerTab)



NEW fields:

- "External Refs.": Field Type = Text/URL, Table
 - Same as new "External Ref." field on AllAddTab
- "Cited/Taxonomic Automatic" (Automatic) = Yes/No radio-button
 - Logic/Function: When "Yes" is selected, auto-generate the Cited Name and Taxonomic Name.

Existing fields:

- NamSource (Source of Information): Change to drop-down list.
 - Lookup list: NEW "Party Source" :1
- Cited/Taxonomic Names groupbox
 - NamCitedName (Cited)
 - NamTaxonomicName (Taxonomic)

Fields to remove

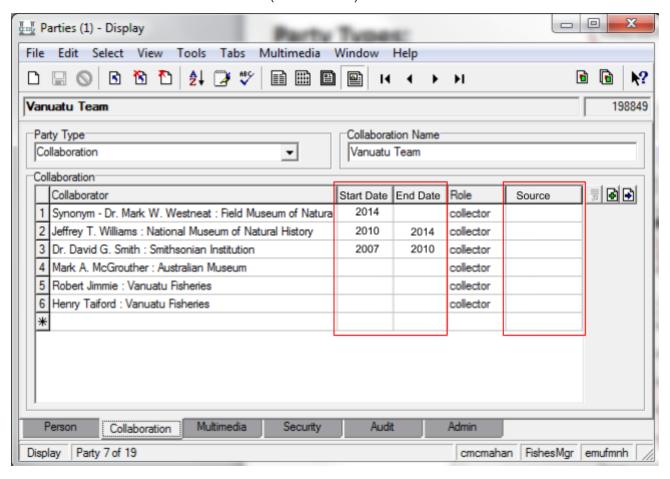
- NamDialect

Functionality:

- Use existing name string generation rules.
- Edit EXISTING functionality for NamAutomatic = Yes
 - Do NOT auto-generate NamTaxonomicName ("Taxonomic")
 - Do NOT auto-generate NamCitedName (Cited)
 - Auto-generate NamSalutation (Salutation),

- Auto-generate **NamFullName** (Full Name)
- Auto-generate **NamBriefName** (BriefName)
- Add NEW functionality for "Cited/Taxonomic Automatic" (Automatic) field = Yes
 - Do NOT Auto-generate **NamSalutation** (Salutation),
 - Do NOT Auto-generate NamFullName (Full Name)
 - Do NOT Auto-generate **NamBriefName** (BriefName)
 - Auto-generate **NamTaxonomicName** (Taxonomic)
 - Auto-generate NamCitedName (Cited)

EXISTING TAB - Collaboration (AllColTab)



NEW fields:

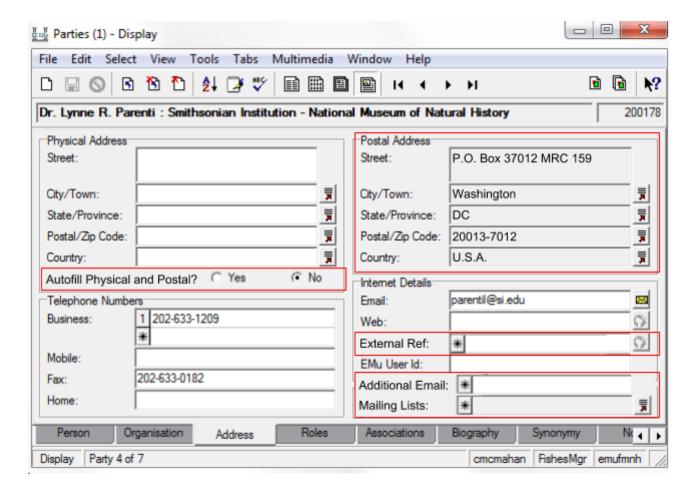
- In Collaboration Table:

Start Date: Date [M]End Date: Date [M]

- Source: Text, Lookup (50 chars) [M]

EXISTING Fields: None Fields to REMOVE: None Functionality: None

EXISTING TAB - Address (AllAddTab)



NEW fields:

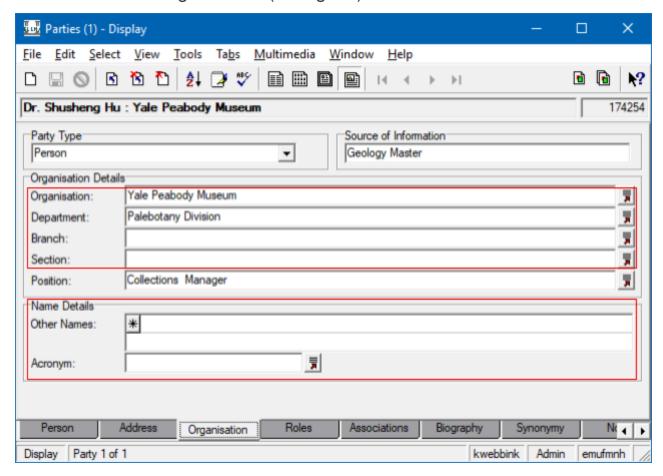
- "Autofill Physical and Postal?" Yes/No radio-button
- "External Refs." Text/URL, [M],
 - Same as new "External Ref." field on AllPerTab
 - Logic/Calculations if value is a resolvable URL, make the web-button function as it does for AddWeb
- "Additional Emails" Text/URL, [M]

Existing fields: None Fields to REMOVE:

Functionality:

- When new field Autofill Physical and Postal? = "Yes", copy values from Physical to Postal as follows:
 - AddPhysStreet → AddPostStreet
 - AddPhysCity → AddPostCity
 - AddPhysState → AddPostState
 - AddPhysPost → AddPostPost
 - AddPhysCountry → AddPostCountry

EXISTING TAB - Organisation (AllOrgTab)



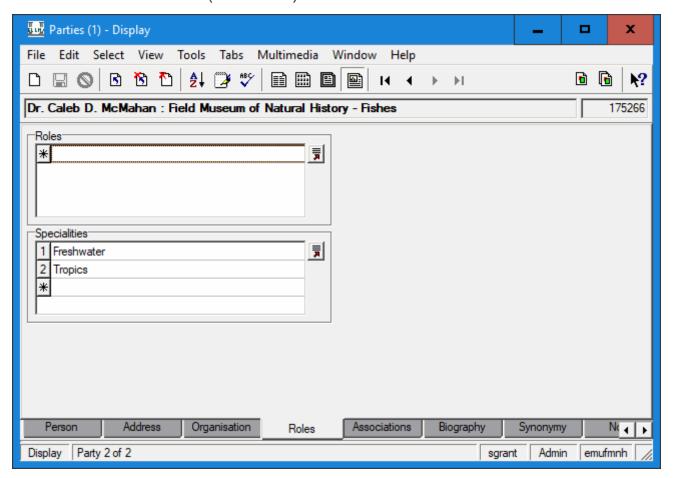
NEW fields: None EXISTING fields: None Fields to Remove: None

Functionality:

- If Current Record NamPartyType = "Person" or "Collaboration"
 AND Current Record.AssAssociationRef_tab is NOT NULL
 AND Current Record.NEW FIELD "Preferred" = Yes
 - Autofill these fields
 - NamOrganisation,
 - NamDepartment,
 - NamBranch,
 - NamSection,
 - NamOrganisationOtherNames_tab,
 - NamOrganisation_acronym
 with the corresponding values in AssAssociationRef_tab and make READONLY..

Example irn = 175266

EXISTING TAB - Roles (AllRolTab)

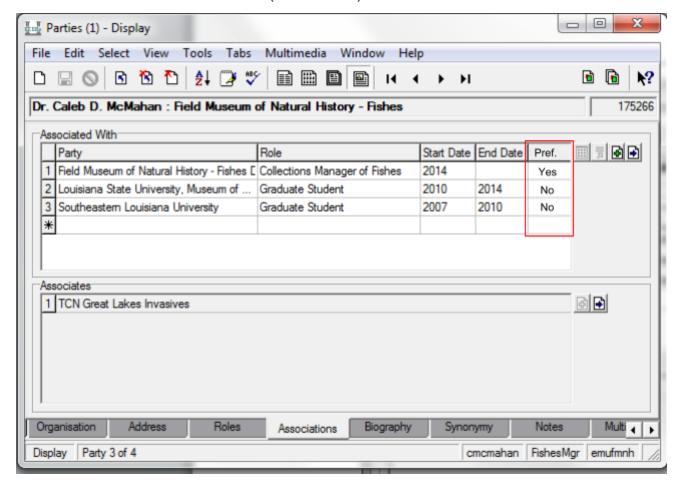


NEW fields: None EXISTING fields: None Fields to REMOVE: None

Fields to remove

- BioLabel ("Label"): text, atomic

EXISTING TAB - Associations (AllAssTab)



NEW fields:

Associated With table

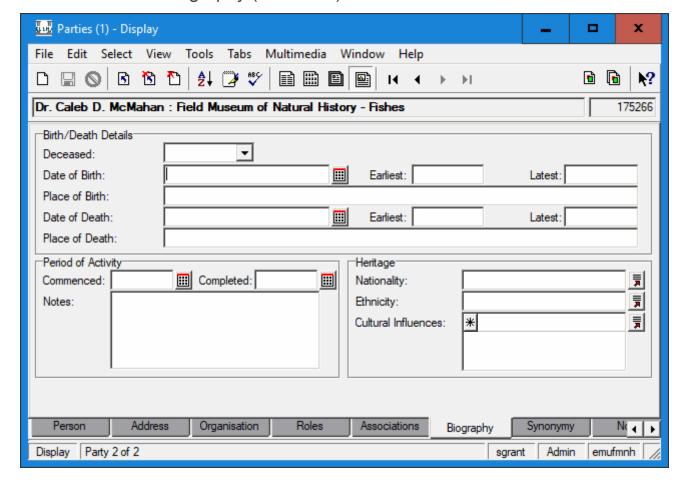
- "Preferred": Lookup text (5 chars) [M]

- Lookup list: EXISTING YesNo

EXISTING fields - None Fields to REMOVE: None

Functionality: See Organisation Tab

EXISTING TAB - Biography (AllBioTab)



NEW fields:

- "Deceased?": Dropdown Text (10 chars)

Lookup: EXISTING YesNoUnknown

EXISTING fields:

Fields to remove

- Remove Movement Table

- **BioLocation_tab**: *Text*

BioMovementStartDate0: Date
 BioMovementEndDate0: Date
 BioMovementNotes_tab: Text

Functionality

Auto-check new "Deceased?" field if BioDeathDate is not NULL.

Tabs no longer needed:

- AllSynTab ("Synonymy")

Tools - None

Broken Things

Reverse Attachments in reports

- For reports that include reverse attachments from other modules, some reverse-attachment fields throw an error if they are grouped within the report.
 - e.g. In The "Parties and attached Obj" report, if the fields from ecollectionevents, eevents, efmnhrepatriation, emultimedia, efmnhtransactions, and etaxonomy are given unique names and added to "Group 1", and a user tries to run the report on a record set, they get this error:
 - The reverse-attachment fields are also removed from the fields listed in the report properties.

Red Flags - None