

Module: **eparties**



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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**

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

Tabs

Tabs to be updated:

EXISTING TAB - Person (AllPerTab)

Parties (1) - Display

File Edit Select View Tools Tabs Multimedia Window Help

N. Altamirano 205744

Party Type: Person

Person Details:

Title: [Dropdown]

First: Noel

Middle: [Empty]

Last: Altamirano

Suffix: [Dropdown]

Other Names: 1 [Empty]

External Refs.: 1 IPNI Id: 20021422-1

Gender: ☐ Female ☒ Male ☐ Unknown

Language: Primary: [Empty]

Derived Names:

Automatic: ☐ Yes ☒ No

Salutation: [Empty]

Full: Noel Altamirano

Brief: N. Altamirano

Cited/Taxonomic Names:

Automatic: ☐ Yes ☒ No

Cited: [Empty]

Taxonomic: N. Altam.

Source of Information: Botany Master

Person Address Organisation Roles Associations Biography Synonymy Name

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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 (AllCoITab)

Parties (1) - Display

File Edit Select View Tools Tabs Multimedia Window Help

Vanuatu Team 198849

Party Type: Collaboration

Collaboration Name: Vanuatu Team

Collaborator	Start Date	End Date	Role	Source
1 Synonym - Dr. Mark W. Westneat : Field Museum of Natural History	2014		collector	
2 Jeffrey T. Williams : National Museum of Natural History	2010	2014	collector	
3 Dr. David G. Smith : Smithsonian Institution	2007	2010	collector	
4 Mark A. McGrouther : Australian Museum			collector	
5 Robert Jimmie : Vanuatu Fisheries			collector	
6 Henry Taiford : Vanuatu Fisheries			collector	
*				

Person Collaboration Multimedia Security Audit Admin

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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)

Parties (1) - Display

File Edit Select View Tools Tabs Multimedia Window Help

Dr. Lynne R. Parenti : Smithsonian Institution - National Museum of Natural History 200178

Physical Address

Street:

City/Town:

State/Province:

Postal/Zip Code:

Country:

Autofill Physical and Postal? ☐ Yes ☒ No

Telephone Numbers

Business: 1 202-633-1209

Mobile:

Fax: 202-633-0182

Home:

Postal Address

Street: P.O. Box 37012 MRC 159

City/Town: Washington

State/Province: DC

Postal/Zip Code: 20013-7012

Country: U.S.A.

Internet Details

Email: parentil@si.edu

Web:

External Ref: *

EMu User Id:

Additional Email: *

Mailing Lists: *

Person Organisation Address Roles Associations Biography Synonymy Notes

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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)

Parties (1) - Display

File Edit Select View Tools Tabs Multimedia Window Help

Dr. Shusheng Hu : Yale Peabody Museum 174254

Party Type: Person Source of Information: Geology Master

Organisation Details

Organisation: Yale Peabody Museum

Department: Paleobotany Division

Branch:

Section:

Position: Collections Manager

Name Details

Other Names:

Acronym:

Person Address Organisation Roles Associations Biography Synonymy Ne

Display Party 1 of 1 kwebbink Admin emufmnh

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 (AllRoITab)

Parties (1) - Display

File Edit Select View Tools Tabs Multimedia Window Help

Dr. Caleb D. McMahan : Field Museum of Natural History - Fishes 175266

Roles

- * [Empty]

Specialities

- 1 Freshwater
- 2 Tropics
- * [Empty]

Person Address Organisation Roles Associations Biography Synonymy No

Display Party 2 of 2 sgrant Admin emufmnh

NEW fields: None

EXISTING fields: None

Fields to REMOVE: None

Fields to remove

- **BioLabel ("Label")**: *text, atomic*

EXISTING TAB - Associations (AllAssTab)

Party	Role	Start Date	End Date	Pref.
1 Field Museum of Natural History - Fishes	Collections Manager of Fishes	2014		Yes
2 Louisiana State University, Museum of ...	Graduate Student	2010	2014	No
3 Southeastern Louisiana University	Graduate Student	2007	2010	No
*				

Associates
1 TCN Great Lakes Invasives

Organisation Address Roles Associations Biography Synonymy Notes Multi

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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)

The screenshot shows a software window titled "Parties (1) - Display". The menu bar includes File, Edit, Select, View, Tools, Tabs, Multimedia, Window, and Help. The toolbar contains various icons for file operations and navigation. The main content area is divided into several sections:

- Header:** "Dr. Caleb D. McMahan : Field Museum of Natural History - Fishes" and the number "175266".
- Birth/Death Details:** A section with fields for "Deceased:" (a dropdown), "Date of Birth:" (a date picker), "Place of Birth:", "Date of Death:" (a date picker), and "Place of Death:". It also includes "Earliest:" and "Latest:" date fields for both birth and death.
- Period of Activity:** Fields for "Commenced:" (a date picker) and "Completed:" (a date picker), followed by a "Notes:" text area.
- Heritage:** Fields for "Nationality:", "Ethnicity:", and "Cultural Influences:" (which contains an asterisk *).

At the bottom, there is a tabbed interface with buttons for "Person", "Address", "Organisation", "Roles", "Associations", "Biography" (which is the active tab), "Synonymy", and "No". Below the tabs is a status bar showing "Display", "Party 2 of 2", and user roles "sgrant", "Admin", and "emufmnh".

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 ecollezionevents, eeevents, 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