

## Morpho - Bug #669

### streamline entry for responsible party

11/06/2002 01:05 PM - Matt Jones

<b>Status:</b>	Resolved	<b>Start date:</b>	11/06/2002
<b>Priority:</b>	Immediate	<b>Due date:</b>	
<b>Assignee:</b>	Saurabh Garg	<b>% Done:</b>	0%
<b>Category:</b>	morpho - general	<b>Estimated time:</b>	0.00 hour
<b>Target version:</b>	1.5	<b>Spent time:</b>	0.00 hour
<b>Bugzilla-Id:</b>	669		
<b>Description</b>			
<p>Entering contact information for people and other responsible parties is common and time-consuming. We could substantially streamline this process using several mechanisms. Here are some possibilities:</p> <p>1) Collect contact information about the user in the profile. When they type their last name in a eml-party surname field, pop up a window asking if they want to use their own info, and fill it in for them if they say yes.</p> <p>2) When someone enters a surname in, look it up in ldap, either on each keystroke, or when they move to the next field. This may be something we want to ask metacat to do. Pop up a dialog that doesn't prevent them from continuing to enter the name, and ask if they want to use one of the ldap entries. If they say yes, format the entry in EML and fill in the values for them.</p> <p>3) Keep a list of entries in memory for parties that the user has entered previously in the current package, or in all packages. When they type in surname, pop up a dialog as in (2) with this list and ask if they mean one of the existing people. If that person is already in the document, add a reference to that person if using eml 2. Otherwise, add the person in as an eml block.</p>			
<b>Related issues:</b>			
Is duplicate of Morpho - Bug #253: use profile info for default text in wizard		<b>Resolved</b>	<b>07/12/2001</b>
Is duplicate of Morpho - Bug #668: streamline party entry		<b>Resolved</b>	<b>11/06/2002</b>

### History

#### #1 - 11/06/2002 01:10 PM - Matt Jones

- Bug 253 has been marked as a duplicate of this bug. \*\*\*

#### #2 - 01/10/2003 09:15 AM - Matt Jones

- Bug 668 has been marked as a duplicate of this bug. \*\*\*

#### #3 - 12/09/2003 10:58 PM - Matt Jones

Retargeting at 1.5, as at least one mechanism for streamlining party entry has been prototyped. Thus release may not implement all of the described mechanisms for party entry, but it should improve at least some of the entries.

#### #4 - 01/23/2004 01:29 PM - Saurabh Garg

Comments in morpho-feedback-20040122.doc in /doc/devs/ by Andrea Chadden:

1. When entering people information into the Owner / Contact / Associated Party details screens, the feature allowing user to select previously entered personnel information should be made more explicit, and possibly offered on the previous wizard screen.

My comments: Need to discuss how to make it more explicit. It was on previous wizard screen earlier. But it was put on the current screen as more functionality will be added with this widget on this screen

2. Also, when entering people information into the Owner / Contact / Associated Party details screens, make it possible to select and then modify an existing entry to create a NEW entry (as when two individuals have the same contact information but you want to change more than just their name)

My comments: We have discussed about adding this functionality without risking the possibility of making the wizard too complex for the user.

**#5 - 01/30/2004 11:22 AM - Saurabh Garg**

Following remaining issues with his screen:

1. The references could point to a different document. This is a bug and needs to be resolved before release.
2. Other enhancement is to give user the choice between using previous entry as a reference or as a copy. The text for the dialogue box will be tricky and needs to be decided. I will send an email with possible text for the dialogue box.

**#6 - 02/19/2004 10:05 AM - Saurabh Garg**

From Bug# 1243

In DPW "Research Project", when adding personnel I chose an existing person from the list, and when I clicked ok the party did not show up in the list of personnel. Even entering a person manually after that did not result in an entry in the list. This is probably a bug.

----- Additional Comment [#4](#) From Saurabh Garg 2003-12-30 09:20 -----

fixed 8 and 9  
in 10: Entering a person manually now adds it to the list. If picked from the list, it doesn't add to the list because it is supposed to be a reference. This can be changed if wanted.

----- Additional Comment [#5](#) From Matt Jones 2003-12-30 09:35 -----

Regarding 10) I think that even references should show up in the list, as the user needs some visual indication that the entry exists, and needs a way to delete the entry if they decide to. The only problem comes with editing: you can either a) disable editing for references, or b) enable editing but edit the original party entry wherever it exists. I prefer b) because it gives the user more options, but you'll need to indicate to them that changing the party's info on the reference screen will effectively change it throughout the document.

**#7 - 04/08/2004 02:05 PM - Chad Berkley**

matthew has added an extensive framework for pulling party information from different packages via references. You can now get contact information from either other contacts inside the current package and you can import contacts from other packages that the user has access to. This bug will now be closed, but the relevant items that have not been completed will be transferred to another 'postpone' bug.

**#8 - 03/27/2013 02:14 PM - Redmine Admin**

Original Bugzilla ID was 669