

Multi **MIMSY**
super tech tips

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The People/Organization Authority

Topics:

- **Creating Authority records for individuals and organizations**
- **Linking related Authority records**
- **Field Validation in the Master Catalogue and beyond**
- **Special hints for modifying Field Validation functionality**
- **Appendix listing each and every field in Multi MIMSY that validates against the People/Organization Authority!**

Multi MIMSY 2000 Super TechTip Tutorial: The People/Organizations Authority

Introduction Knowledge Authorities were created to give you the opportunity to surround items in your collection with context. One of the most commonly used Knowledge Authorities is the People/Organizations Authority. Use the People/Organizations Authority to keep track of each and every person and organization associated with your institution.

You know from completing basic data entry in Multi MIMSY that there are certain fields within the system that require you to enter a name. Many of these name fields validate against information held within the People/Organizations Authority. The validation ensures that names are spelled correctly and are in the format preferred by your institution. If the name is a new one that Multi MIMSY has not seen before, you are able to create a People/Organization Authority entry on the fly as you continue your work.

Different people or organizations can have different jobs (or roles) in relation to your institution. It is not uncommon for a single person to have a number of responsibilities. The People/Organizations Authority allows you to assign a person or organization multiple roles depending on their relationship to the collection. Here is a list of roles assignable to people and organizations in this Authority:

Appraiser	Authorizer
Borrower	Collector
Conservator	Copyright Holder
Examiner	Identifier
Insurer	Lender
Maker	Mover
Owner	Publisher
Reproducer	Shipper
Source	Staff
Venue	Other

See the Appendix at the end of this Tutorial for a complete field-by-field listing of where each of these roles fits in to Multi MIMSY.

You can also keep People/Organization Authority records for those people or organizations who are not directly related to the collection in an official capacity. For example, you can keep records of people

depicted in the art in your collection, or you may record information about museum docents or members.

Famed geologist and explorer Dr. Sandy Igneous fell into a volcano in Hawaii in 1939. Before he died, he bequeathed his exquisite rock and gem collection to the Willoughby Gallery's Mineral Collection. Here's how the people associated with Dr. Igneous and his collection break down in the People Organizations Authority:

The Example

- **Dr. Sandy Igneous:** An initial record was created for Dr. Sandy Igneous. He was flagged in the record as an Owner and Source because he owned his own collection and is the source of the donation.
- **Directorate of Inter-Provincial Rock Technicians (D.I.R.T.):** Dr. Igneous was founder and member of Canada's Directorate of Inter-Provincial Rock Technicians (D.I.R.T.). A People/Organizations Authority record was created to store information about the organization because it relates both to Dr. Igneous as well as his newly accessioned collection in the permanent collection.
- **Mr. Johnny Johnson:** One of Dr. Igneous' giant amethyst specimens was in pretty poor shape when it was acquired by the Willoughby Gallery, so it was sent to Johnny Johnson, the gallery's conservator. A record for Johnny Johnson was created to indicate his role of "Conservator." Johnny Johnson is not only the conservator, but he is also a specimen handler. As such, his record is also flagged for the roles of "Mover" and "Staff."
- **Canadian Museum of Nature, Museum of Natural History, Fine Arts Express, and Mr. Jackson Potluck:** Once Dr. Igneous' rocks and gems had been accessioned and conserved, they were allowed to be loaned to a series of museums hosting the travelling exhibit, "A Legacy in Stone: Dr. Sandy Igneous, Rock Pioneer." People/Organization records were created for the Canadian Museum of Nature (the Lender), the Museum of Natural History (a Borrower and a Venue), Fine Arts Express (the Shipper), and Mr. Jackson Potluck, the Collections Manager at the Canadian Museum of Nature responsible for approving the loan of the objects (Authorizer).
- **Mr. Roy Clark and Mrs. Patty Klein:** In anticipation of the exhibition, an exhibit catalogue was prepared featuring pictures of Dr. Igneous' collection.

People/Organizations records were created for Mr. Roy Clark, the photographer (Reproducer), and Mrs. Patty Klein, the author and publisher (Publisher). The Museum of Nature, already entered into the Authority and owner of Dr. Igneous' collection, is flagged as a Copyright Holder.

As you can see, every person or organization that is in some way related to the donor and his objects gets its own little space in the People/Organization Authority. We can see how this web of knowledge crystallizes as we use the People/Organization Authority to catalogue the first two strands in the web: Dr. Sandy Igneous and his organization, the Directorate of Inter-Provincial Rock Technicians. Once these two records are created, we will look at how they can be related to each other, then used for validation in other areas of the Multi MIMSY database.

Creating a People/Organization Authority Record for an Individual

Log in to Multi MIMSY and go to the People/Organization Authority by clicking on the **Authorities** Icon, then choosing **People/Organizations** from the Pop-Up list.

Create a new People/Organization Authority record by pressing **F6**, or by choosing **Record, Create** from the menu.

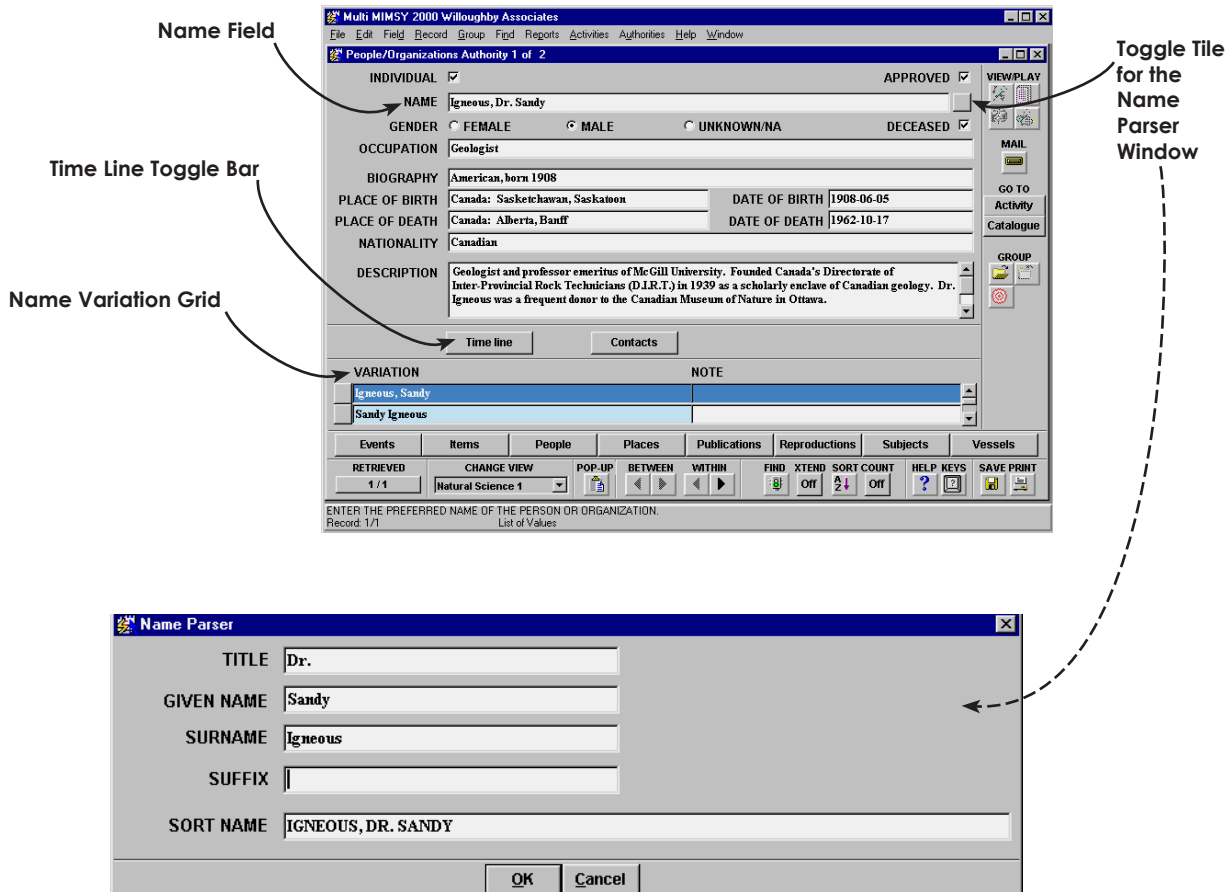
Enter the preferred name of the individual in the Name field. Depending on your institutional standards, you may enter the name in transposed order (Last Name, First Name) or natural order (First Name Last Name). Consult your friendly database administrator or supervisor to determine how your institution handles this name question.

DBA Note: The NAME_ORDER default may be set to accept names in Natural or Transposed order. This enables users to enter names in whatever format they prefer and still have the names parsed correctly.

Click the Toggle Tile next to the Name field to go to the Name Parser Window. Notice that the individual's name has been broken down and distributed to the Given Name and Surname fields. If an honorific, such as Ms. or Mr., was entered in the Preferred Name field on the front page, this will also be placed in the Surname field. You will need to delete this from the Surname field and place it in the Prefix field.

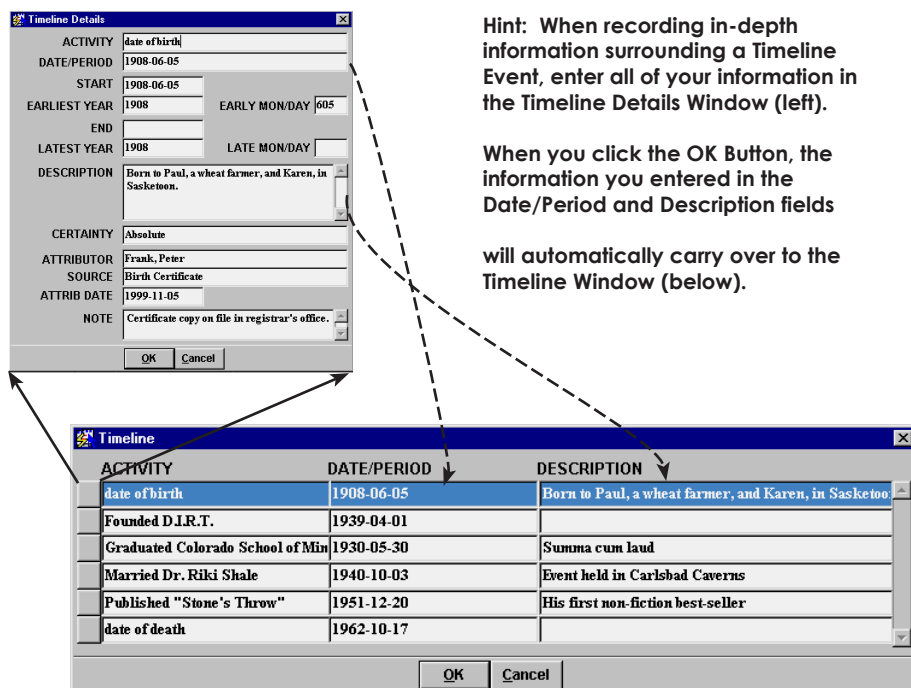
DBA Note: By changing the NAME_PARSER attribute in the Multi MIMSY System Module, the honorifics that your institution uses can be parsed into the title automatically.

Also: the Sort Name field remains in reverse order, regardless of whether your institution uses natural or transposed order in the Preferred Name field, so that the name will sort correctly in Pop-Up Lists throughout the system.



Make sure that the Individual Flag Field, located above the Name Field, is checked. To the right of the Individual Flag Field is a box labeled "Approved". If your institution has a data input checking procedure, the Approved Flag Field is used to verify that the record has been quality checked and OK'd.

Click on the Time line Toggle Bar to enter information about specific events, milestones, or important dates surrounding the individual. After entering the activity or event, click on the Toggle Tile to the left of the row containing the newly entered activity to enter activity-specific details, such as earliest and latest year, as well as event-specific attribution information.



Whereas the Name field at the top of the screen holds the de facto preferred name of the organization or person, the Name Variation grid holds alternate names or variations of the preferred version of the name. Each row in this grid also has a Toggle Tile that leads to an Attribution Window, which is where information on the research leading to the discovery of a name variation can be recorded.

Single Name Variation in Reverse and Natural Order

VARIATION	NOTE
Igneous, Sandy	
Sandy Igneous	

Events Items People Places Publications Reproductions Subjects Ve

Name Variation Grid

When filling out the Name Variation Grid, the question should be, "How are Multi MIMSY users going to try to enter this person's name when doing data entry?" In our example, Dr. Sandy Igneous may be entered as "Sandy Igneous," or "Igneous, S," or "Dr. Igneous," and so on. By creating rows for each of these variations here in the Name Variation Grid, whenever any of the variations are entered throughout the system, Multi MIMSY will recognize that the user is really talking about Igneous, Dr. Sandy and the proper link will be made to the existing People/Organization Authority record. One hard and fast rule for the Name Variants Grid is to record two rows for each alternate name – one in natural order, one in reverse order – to account for all data entry possibilities.

To finish the record, go **Within** a record to screen 2 and assign the appropriate roles by filling in the Role Flag Fields at the top of the screen. Save the record, and the record for Dr. Igneous is complete.

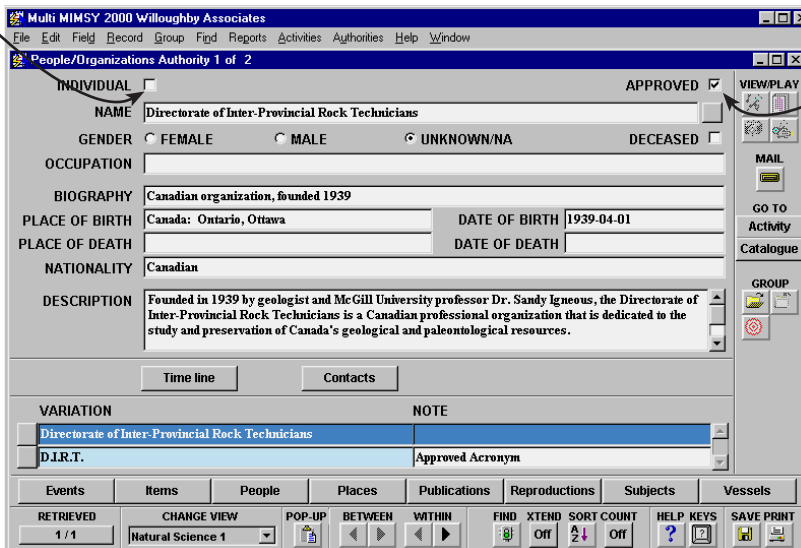


Enter the People/Organization Authority and click **Record, Create** or press **F6** to create a new Authority record.

Enter the preferred name of the organization in the Name Field, then make sure that the Individual Flag Field is unchecked. To the right of the Individual Flag Field is a box labeled "Approved". If your institution has a data input checking procedure, this field is used to verify that the record has been quality checked and OK'd.

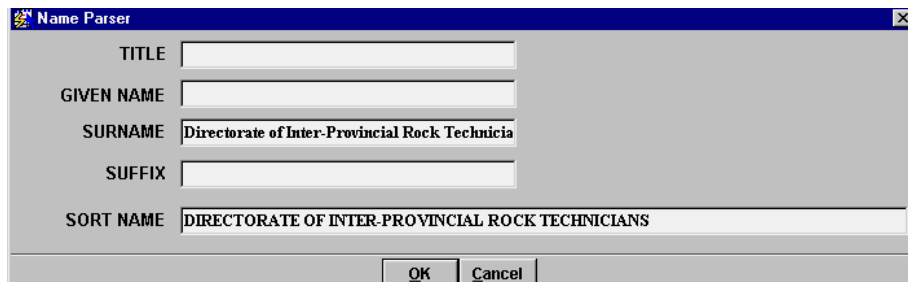
Creating a People/Organization Authority Record for an Organization

Individual Flag Field



Approved Flag Field

Click on the Toggle Tile next to the Name Field to access the Name Parser Window. Notice that, in the case of an organizational name, the entire value from the Preferred Name field is inserted into the Surname field, as well as into the Sort Name field.



The screenshot shows a 'Name Parser' dialog box with the following fields and values:

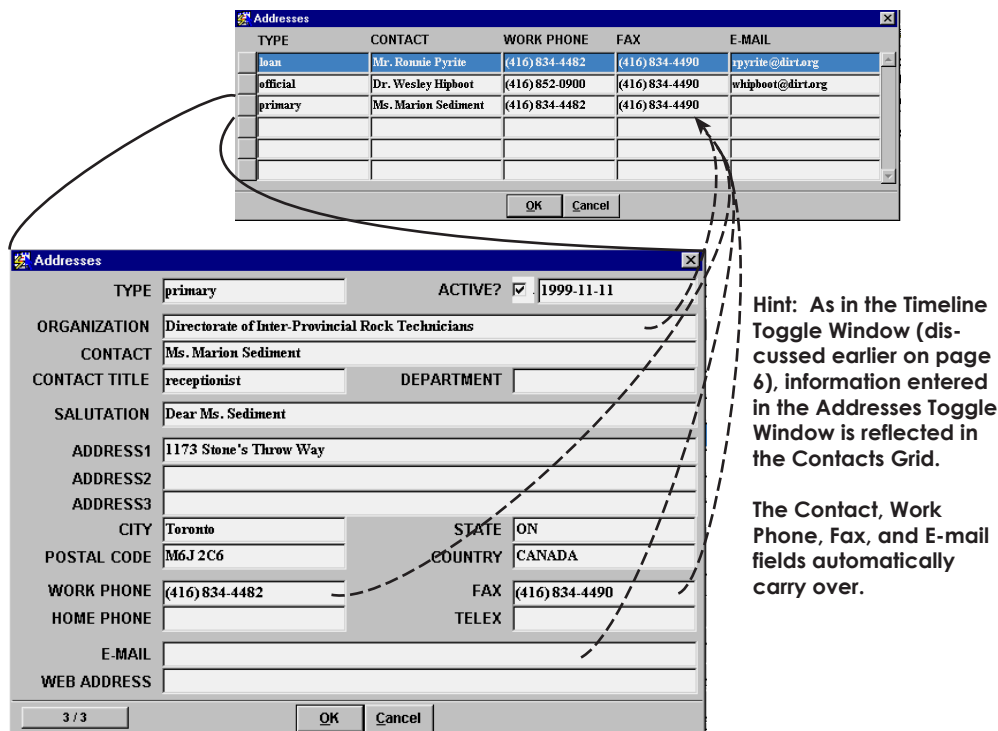
Field	Value
TITLE	
GIVEN NAME	
SURNAME	Directorate of Inter-Provincial Rock Technicia
SUFFIX	
SORT NAME	DIRECTORATE OF INTER-PROVINCIAL ROCK TECHNICIANS

Buttons: OK, Cancel

Complete data entry in the top half of screen 1. Check your institution's cataloguing procedures on whether fields like Biography and Place of Birth/Death are used for organizations. Once this section of data entry is complete, save the record by clicking the **Save** button in the bottom right corner of the screen, choosing **File, Save** from the menu, or pressing **F10** on your keyboard.

Next, click on the Contacts Toggle Bar (located beneath the Description field) to add contact information for the organization. The People/Organization Authority allows you the flexibility to keep numerous contact entries for a single organization. In our D.I.R.T. example, we have information for the Directorate's secretary, current president, and a contact in the business office. Clicking on the Toggle Tile to the left of any of these rows in the Contacts grid calls up an Addresses window where complete contact information, specific to a single person, may be kept.

Click the OK button to save your contact information and return to the front screen.



By entering contact information here, you are building a Pop-Up List in the Loans In/Out Activities. If we were to create a loan record with D.I.R.T. as the Institution, these three values would automatically come up when the Contact Field Pop-Up List was called up.

Next, record any alternate names for the organization in the Name Variants Grid.

VARIATION	NOTE
Directorate of Inter-Provincial Rock Technicians	
D.I.R.T.	Approved Acronym

Events Items People Places Publications Reproductions Subjects Vessels

Finally, go to Screen 2 of the record by clicking the **Within** button at the bottom of the screen, and assign the appropriate roles.

People/Organizations Authority 2 of 2

NAME Directorate of Inter-Provincial Rock Technicians 2

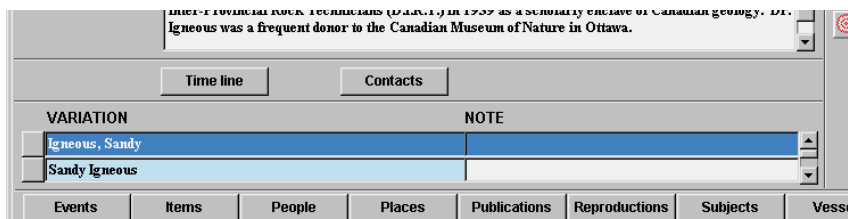
BIOGRAPHY Canadian organization, founded 1939

APPRAISER <input type="checkbox"/>	CONSERVATR <input type="checkbox"/>	INSURER <input type="checkbox"/>	OWNER <input checked="" type="checkbox"/>	SOURCE <input checked="" type="checkbox"/>
AUTHORIZER <input type="checkbox"/>	CPYRGT HLD <input checked="" type="checkbox"/>	LENDER <input checked="" type="checkbox"/>	PUBLISHER <input checked="" type="checkbox"/>	STAFF <input type="checkbox"/>
BORROWER <input checked="" type="checkbox"/>	EXAMINER <input checked="" type="checkbox"/>	MAKER <input type="checkbox"/>	REPRODUCER <input type="checkbox"/>	VENUE <input type="checkbox"/>
COLLECTOR <input checked="" type="checkbox"/>	IDENTIFIER <input checked="" type="checkbox"/>	MOVER <input type="checkbox"/>	SHIPPER <input type="checkbox"/>	OTHER <input checked="" type="checkbox"/>

Linking People/Organization Authority records

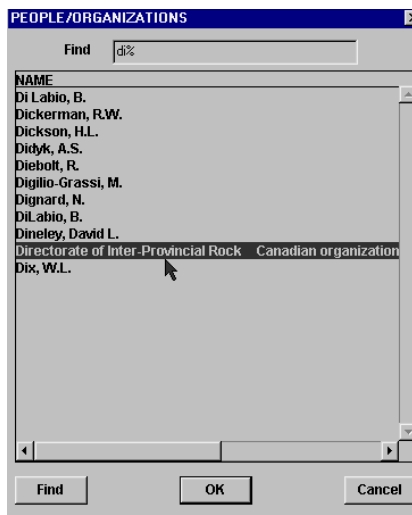
Since Dr. Igneous is related to D.I.R.T., we can log this relationship through their Authority records in the Multi MIMSY database. This link only needs to be established in one direction for a two-way relationship to be created.

Return to Dr. Igneous's Authority record, and click on the Related People Toggle Bar at the bottom of the window.



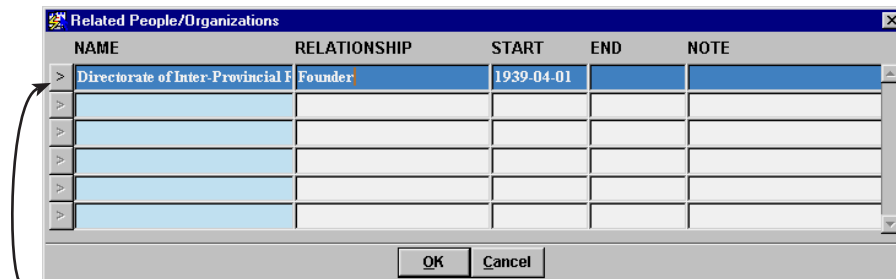
Related People Toggle Bar

With your cursor in the first row of the Name column, press F9 to call up a Pop-Up list containing all the names in the People/Organization Authority. By typing the first few letters of the name that you're looking for (without clicking your cursor anywhere in the window), the list is whittled down to a smaller number of entries. Click once on the name you wish to link, then click the OK button at the bottom of the window.



Related People/Organization Pop-Up List

The other four columns in the Related People/Organizations window refer to the actual relationship between the two people and/or organizations. In our example, Dr. Igneous founded D.I.R.T., so we specified this in the Relationship column. If there are start or end dates for the relationship, or if there are other facts to be recorded about the relationship, use the remaining columns.



Go To
Toggle Tile

Save the record and return to the main People/Organization Authority screen by clicking the OK button. Note that two records are applied and saved; both sides of the relationship (the records for Dr. Igneous and D.I.R.T.) are updated.

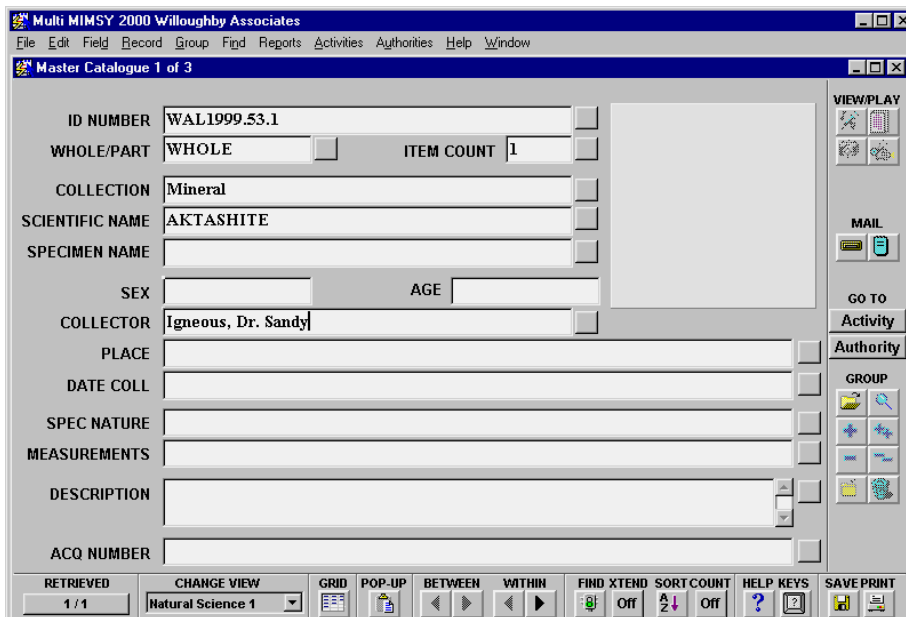
To demonstrate the two-way relationship that is formed, return to the Related People/Organization window by clicking on the Related People Toggle Bar at the bottom of the screen. Next, click the Go To Tile to the left of the row containing the entry for D.I.R.T. The complete People/Organization Authority record for the organization is called to the screen.

Click the Related People Toggle Bar at the bottom of the screen. Note that an entry for Dr. Igneous has automatically been created, completing the mutual relationship between the two records.

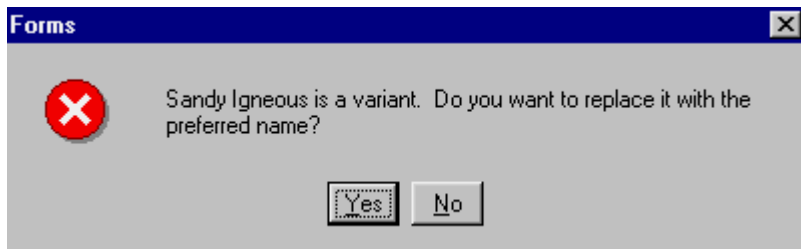
Now that we have created records for D.I.R.T. and Dr. Igneous in the People/Organization Authority, their names are present in Pop-Up lists throughout Multi MIMSY.

For example, a specimen collected by Dr. Igneous can now be catalogued. When we reach the Collector field of the specimen's Master Catalogue record, there are a couple options for inserting a valid name from the People/Organization Authority. You can type in the name as it appears in the Name field back in the People/Organization Authority record, then tab out of the field. As you leave the Collector field, Multi MIMSY recognizes that the name has a record in the Authority, and you will be able to proceed safely to the next field with the knowledge that the name has validated against the People/Organization Authority.

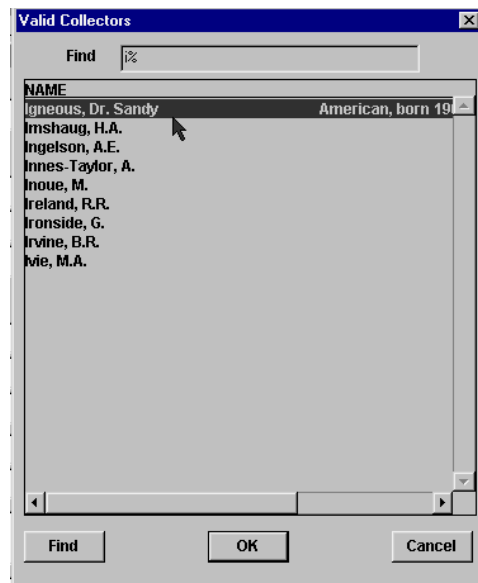
People/Organization Authority In Action: Field Validation



If you were to type in a value from the Name Variant Grid at the bottom of the first screen of the People/Organization Authority record, you would receive a message informing you that the name you entered was an alternate version of a person's or organization's name. You could then choose to replace the name with the preferred version, or keep the variant in the field.



Or you could call up the Pop-Up List for the Collector field by hitting F9 or clicking on the Pop-Up button at the bottom of the screen, then selecting Dr. Igneous from the list.



If a user were to enter a name not matching any Preferred Name or Name Variant in the People/Organization Authority, the user could create a People/Organization record on the fly. The newly created People/Organization is automatically linked to the Master Catalogue record.

NOTE: See the “Expanding and Customizing how Field Validation Works” on page 14 of this tutorial to see how this setting can be modified.

After completing data entry for the specimen, hit **F10**, click the **Save** button in the bottom right corner of the Catalogue screen, or select **File, Save** from the menu to save the record.

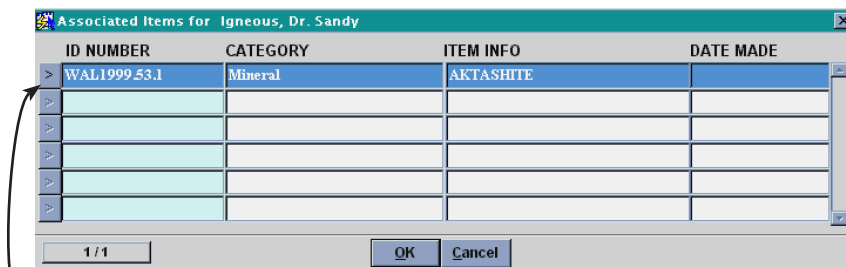
Although we have used the Collector field in the Master Catalogue as the example in this tutorial, the same procedure for name validation is used in each of the fields listed in the Appendix at the end of the tutorial.

When the Master Catalogue record is saved with Dr. Igneous as the Collector, the relationship between object and person is automatically logged in the People/Organization Authority record for Dr. Igneous.

Return to the People/Organization Authority and search the Name field for 'igneous%' to pull up the record for Dr. Igneous. Next, click the bold **Within** button at the bottom of the screen to go to Screen 2, and the Roles Flag Fields.

Tracking Related Items through the People/Organization Authority

Click the Toggle Tile to the right of the Collector Flag Field. The Toggle Window that opens shows all of the instances in the database where Dr. Igneous is catalogued as the Collector. The Go To Tile to the left of each line allows you to navigate directly to each related item.



Go To Toggle Tile leads to related Master Catalogue Record

Expanding and Customizing how Field Validation Works

Much of the name validation that occurs in Multi MIMSY can be modified by the Multi MIMSY DBA to fit the kind of data entry that your institution performs. Each of the customizations described below are simple procedures that may be implemented quickly and painlessly to make the People/Organization Authority, and the accompanying field validation, hand-tailored to your specific circumstances.

If you would like more information on any of these possible features, please call us on our **Technical Support Hotline** at **847.733.3830**, or refer to the Multi MIMSY System Module Manual for more specifics.

QUALIFIERS:

From time to time, the appropriate value for a validated field (the Maker field, for example) may include a qualifying term in addition to a name found in the People/Organization Authority. These qualifiers could be terms like "after" and "attributed to." By changing a couple of settings in the System Module, these qualifiers will be stripped from the entered value to ensure that a link is made to the correct, existing People/Organization Authority record.

The NAME_CHECK.VALID_NAME_TERMS entry, in the System Module's Pop-Up List Editor, manages terms that *should* be stripped from a name before a name is compared for linking.

The NAME_CHECK.IGNORE_NAME_TERMS entry, in the Pop-Up List Editor, manages terms that *should not* be stripped from a name before a name is compared for linking.

EXAMPLE: If the term "attributed to" were added to the NAME_CHECK.VALID_NAME_TERMS Pop-Up List Editor, and "attributed to Igneous, Dr. Sandy" were entered into the Maker field, Multi MIMSY would automatically strip the qualifying term from the entered value and make the correct link to the record for Igneous, Dr. Sandy.

PEOPLE/ORGANIZATION POP-UP LISTS:

The Pop-Up Lists for each of the fields that validate against the People/Organization Authority are controlled by Role check flags on the second screen of the People/Organization Authority. Checking or unchecking the flags determines whether or not the name appears in the Pop-Up List.

The VALIDATE_MAKER Data Default, for example, can be turned on so that users are forced to choose a name from the list and are not able to add new "Maker" records to the People/Organization Authority on the fly. Similar functionality is available for each of the individual/organization roles.

SEARCHING ON VARIATIONS:

Multi MIMSY can be configured so that the Maker field searches against all of the variations of a name so that the user retrieves all records attached to the People/Organization Authority record, regardless of whether the name is a preferred name or a variant.

ENTERING NAMES FOR DISPLAY IN THE MASTER CATALOGUE

MAKER FIELD:

There are two methods of data entry for use in the Maker field.

Users may enter a name in the Maker field on the Master Catalogue's main screen and the name will be copied to the underlying MAKERS_COLLECTORS table. This was the method discussed earlier in the tutorial.

Users may also enter a name in the underlying table (accessed by clicking the MAKER or COLLECTOR toggle tiles in the Master Catalogue) and the user may choose to have the name copied to the Master Catalogue's main screen. This is especially helpful if you have multiple people involved in the making of the object and you want to specify the role they played in its creation.

BUILD MAKER ATTRIBUTION DATA DEFAULT:

The BUILD_MAKER_ATTRIBUTION Data Default determines which values in the MAKERS_COLLECTORS table are used when building a string of names for display on the front screen. The default specifies which values in the ROLE field will be *excluded* from the creation of the string. For example, imagine the default is set to "manufacturer." A user clicks on the Maker Toggle Tile and enters three values:

Gayle Silverman	role=designer
Chris Bohnhoff	role=artist
Andrew Reinhard	role=manufacturer

When the user clicks the OK button to close the toggle window, Multi MIMSY will prompt the user to update the main page. If the user answers "yes," the value entered will be "Gayle Silverman; Chris Bohnhoff."

UPDATING MAKER NAMES:

If you wish, Multi MIMSY may be configured to automatically update Maker names when the Preferred Name field in an existing People/Organization Authority record is updated. Multi MIMSY will automatically update the name in the MAKERS_COLLECTORS table (viewed by clicking the Toggle Tile next to the Maker or Collector fields in the Master Catalogue) and on the Master Catalogue's main screen. (NOTE: In order for this to work, names must have a valid LINK_ID.)

This function is activated by running the UPMAKE.sql script (available upon request from Willoughby) as the MIMSY user through SQL*Plus.

NAME DE-DUPER:

The name de-duper may be purchased as an add-on to Multi MIMSY. The de-duper searches for names that are similar and enables the user to specify if the names actually describe the same person or organization. If so, Multi MIMSY prompts the user to select a "preferred" record. The links from the duplicates are then transferred to the "correct" record.

Still have questions? . . .

See Chapter 5 of the Multi MIMSY Authorities Manual for further information on the field-by-field specifics of the People/Organization Authority.

See the System Module Manual to learn more about the operations of the Pop-Up Lists and Data Defaults discussed in the last section of the tutorial.

Or, call our Technical Support Hotline at (847) 733-3830 between 9:00 and 5:00 Central Time.

Happy Cataloguing!

Appendix: Role Validation Reference Guide

Role	Module	Field
Appraiser	Value Activity	Appraiser
Authorizer	Acquisition Activity Audit Activity Conservation Activity Dispatch Activity Deaccession Activity Exhibition Activity Loans In Activity Loans Out Activity Reproduction Request Activity	Authorizer
Borrower	Loans Out Activity	Institution
Collector	Master Catalogue	Collector
Conservator	Conservation Activity	Performed By
Copyright Holder	Master Catalogue	Copyright Holder (behind the Legal Status Toggle Tile)
Examiner	Condition Activity	Examined By
Insurer	Insurance Activity	Insured By
Lender	Loans In Activity	Institution
Maker	Master Catalogue	Maker
Mover	Location Activity	Moved By
Owner	Master Catalogue	Owner (behind Legal Status Toggle Tile, both top and bottom of window)

Role	Module	Field
Publisher	Publications Authority	Publisher
Reproducer	Reproductions Authority	Reproduced By
Shipper	Loans Out Activity Dispatch Activity	Shipper
Source	Acquisition Activity Master Catalogue	Source
Staff	All Activities	Request By Handled By
Venue	Exhibition Activity Loans Out Activity	Venue
