TUTORIAL 2: Person/Organization Records

In this tutorial you will learn how create a new 'Person/Organization' Record. This type of record allows you to record details about people or organisations who have contributed to the creation of other types of records or have been an Actor in the history of activity related to another type of record.

It is also possible to create a basic 'Person/Organization' record directly from the Assessment Summary page of other types of records. Refer to those tutorials for that method.

1   Getting Started

To create a new Person/Organization record navigate to the Resource Manager Page and click on 'Person/Organization' or select it from the menu on the left side of the screen (Figure 1).
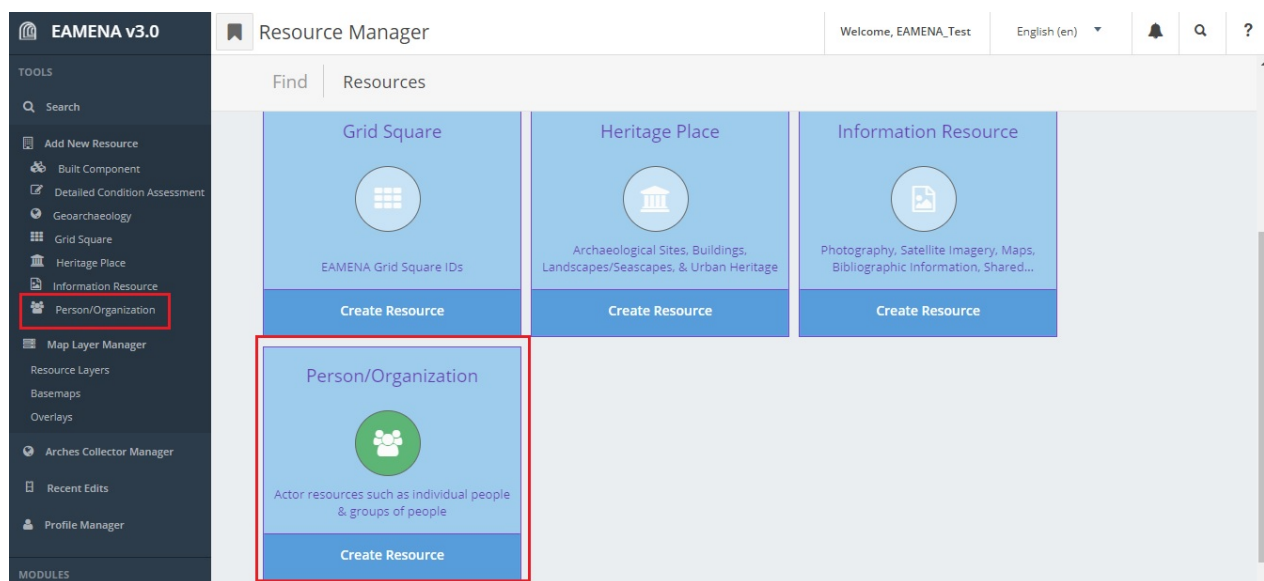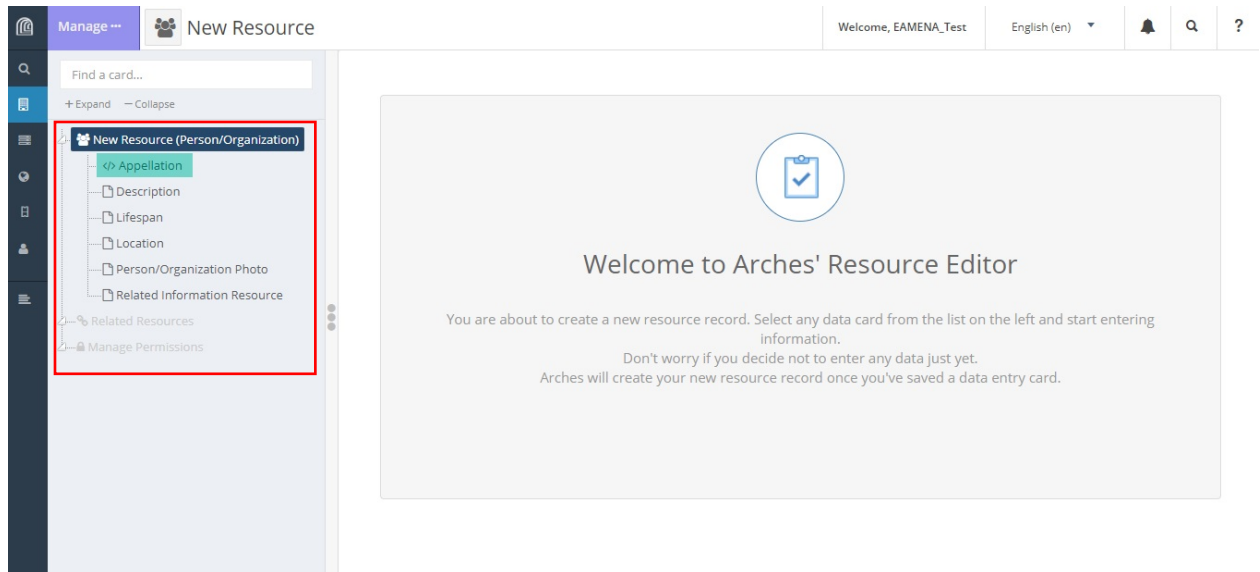

Figure 1

This will open a new, blank 'Person/Organization' Record. The different sections of a record are called 'Cards'. To navigate between them, refer to the 'Card Tree', on the left side of the screen (Figure 2).

Figure 2: A blank Person/Organization record with Card Tree highlighted

2 Filling in the Record

To fill in your record, work through the individual cards in the Card Tree from top to bottom.

2.1 Appellation

Click on 'Appellation' to begin your record (Figure 3).

- In the 'Actor/Investigator Name' field, enter the name of the person or organization you wish to make a record for.
  - Use the format 'First Last' or 'Initial(s) Last', e.g. John Smith, or A. Jones.
- In 'Alternate language name' field, you can enter versions of the name as they appear in other languages, if necessary.
- Click '**Add**'.
- Your record will automatically be created and saved.
- Click 'Delete this Appellation' to delete the entry.

Figure 3

When you have clicked Add, the 'Actor Role Type' Card will appear in the Card Tree on the left. Click on it to add a new role (Figure 4).

- Choose an option from the 'Investigator Role Type' dropdown Menu
- Choose an option from the 'Actor/Investigator Role' dropdown Menu
- If known, enter the From and To Dates in the field below describing when the Person or Organization started and ended the role that has been added.
- Click '**Add**'.

Figure 4

To add another Role, for example, if a person has multiple roles or has moved roles, click on the plus sign beside Actor Role Type to begin a new entry (Figure 5).

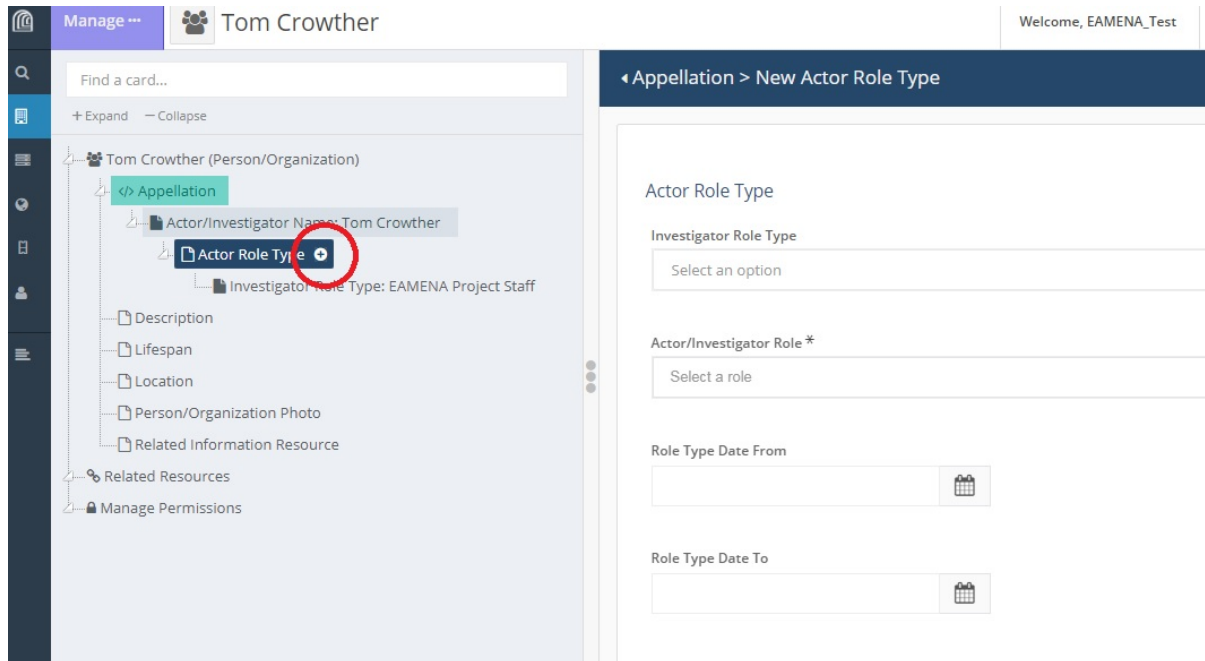- Add as many Roles as are necessary.

Figure 5

2.2   Description

Click on 'Description' in the Card Tree on the left side to enter any additional information you feel is important about the Person or Organization you are recording. This card is optional.

- Choose the 'Description Type' from the dropdown menu (Figure 6).
- In the free-text box, enter the additional information about the Person or Organization you are recording.
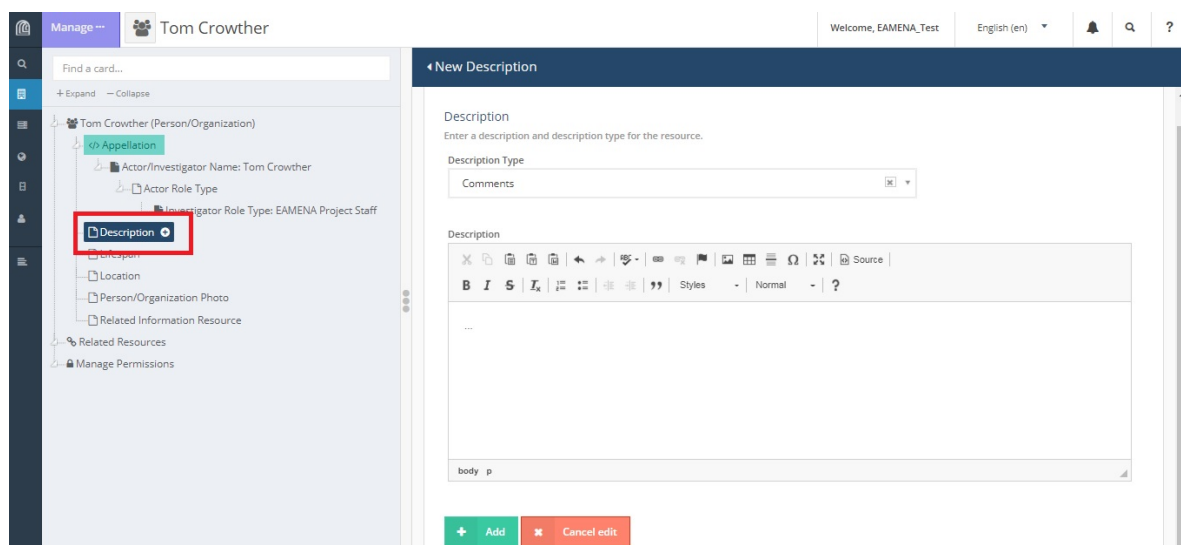- Click '**Add**'.

Figure 6

2.3 Lifespan

Click on 'Lifespan' in the Card Tree on the left side to enter the dates of the person's life or existence of the organisation (Figure 7). This card is optional.

- Under Date of Birth, use the calendar or type the date of the beginning of a person or organisation's existence, e.g. a person's Date of Birth, or an organisation's Date of Foundation.
- Under Date of Death, enter the date of the person's death, or an organisation's end date, if it is known and/or applicable.
- Dates must be entered in YYYY-MM-DD format.
  - If you only have the year and not an exact date, simply enter the year in the field, and it will default to the 1st of January.
- If the Person or Organisation you are adding is a historical figure or organisation for which you do not have exact dates of birth or death, but wish to indicate a broad period in which they lived or existed, choose a term from the 'Cultural Period' dropdown menu.
- Click '**Add**'.

Figure 7

2.4 Location

Click on 'Location' in the Card Tree on the left side to add geographical information about the person or organisation you are recording, for example, the address or country where they are based (Figure 8). This card is optional.

- Draw a point, line, or polygon as appropriate by choosing from the 'Geometric Place Expression: Add a new feature' dropdown
  - For more detailed instructions on how to enter geometries, please refer to **Tutorial 5: Heritage Place Geometries**.
- Enter an address in the free-text box, if it is known and/or applicable.
- Select a country from the 'Country Type' dropdown menu if it is known and/or applicable.
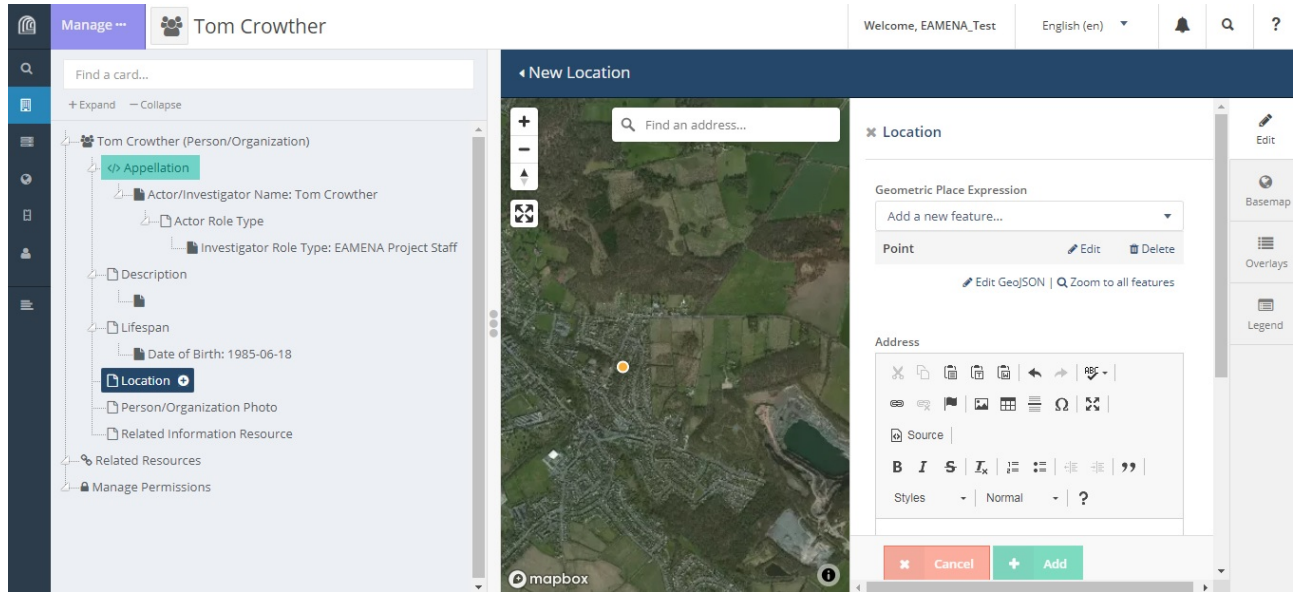- Click '**Add**'.

Figure 8

2.5 Person/Organization Photo

Click on 'Person/Organization Photo' in the Card Tree on the left side to add a photograph or image (e.g. a logo) of the person or organisation you are recording (Figure 9). This card is optional.

- To add an image, drag and drop the image into the panel where indicated
- Alternatively, click Select Photographs to open a window and navigate to the image you wish to upload
- The database will only accept .jpg, .png, and .tiff files, which are less than 8MB in size.
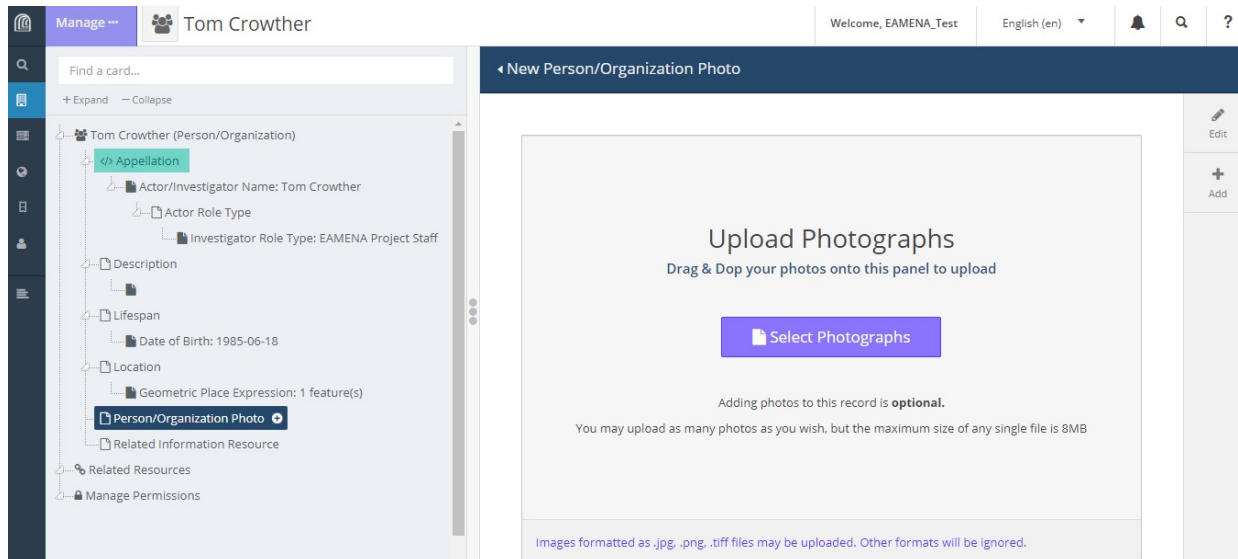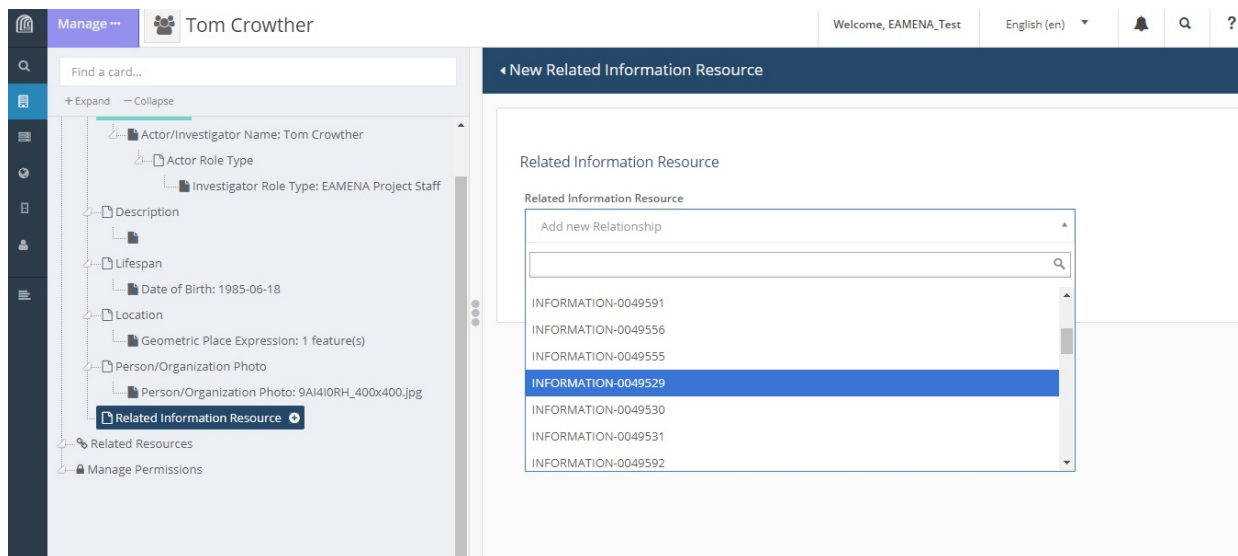

Figure 9

2.6 Related Information Resource

Click on 'Related Information Resource' in the Card Tree on the left side to add a relationship between the Person or Organization you have recorded and an Information Resource Record
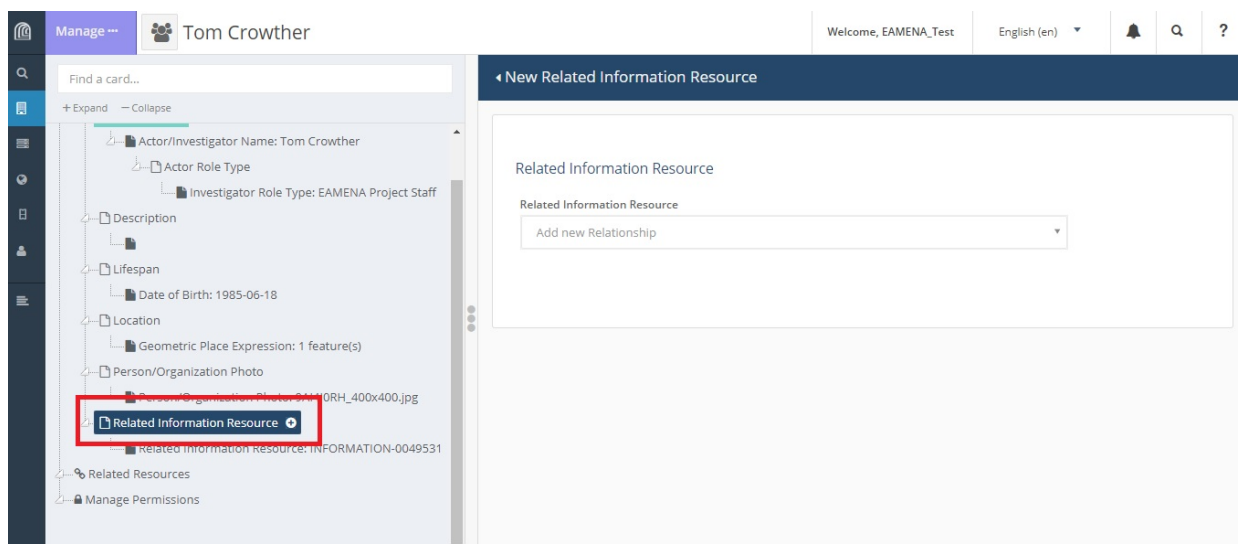
(Figure 10). If your Person or Organization is not related to any Information Resources, this card is optional

- Use the dropdown to find the Information Resource you are looking for by scrolling to find it or typing its ID number in the dropdown search bar.
- Choose and click on the resource you wish to add and it will appear below.
- Click '**Add**'.

Figure 10

To add more relationships, click on 'Related Information Resource' in the Card Tree on the left side again, and repeat the process as many times as necessary (Figure 11).

Figure 11

2.7 Related Resources

To add other types of relationships, click on 'Related Resources' in the Card Tree on the left side (Figure 12).

- The resources that your record is already related to, including Information Resources added in the last section, will appear in a list.
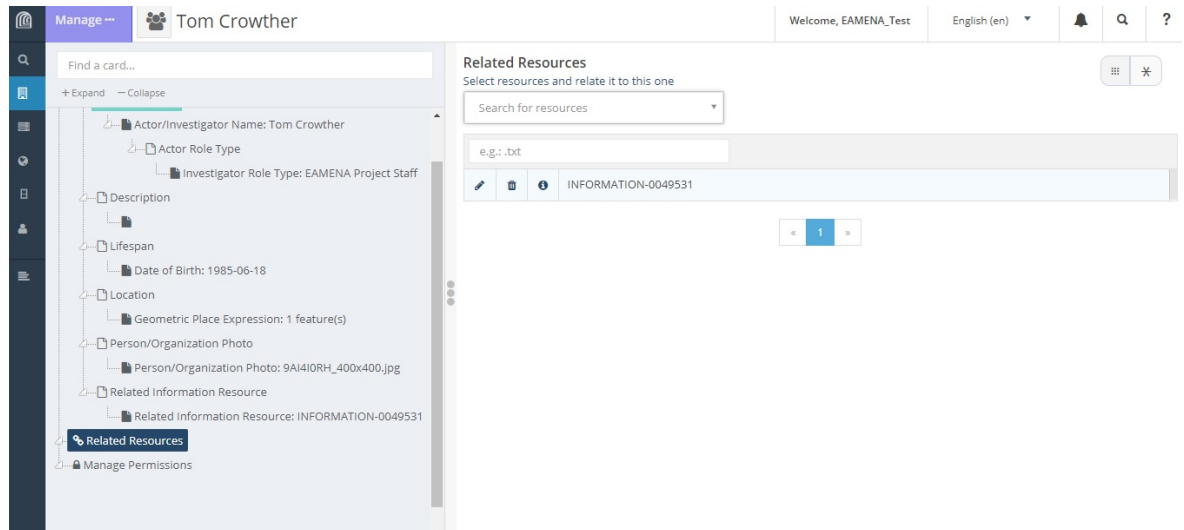- Use the Search Bar to find any further resources you wish to relate your person or organisation to.

Figure 12

2.8 Manage Permissions

The 'Manage Permissions' Card is where it is possible to configure access to an individual record. Please speak to a member of the EAMENA team before accessing or editing any settings in this section to learn more about it.