

BEXIS 2.11.1

Party Package

User Guide

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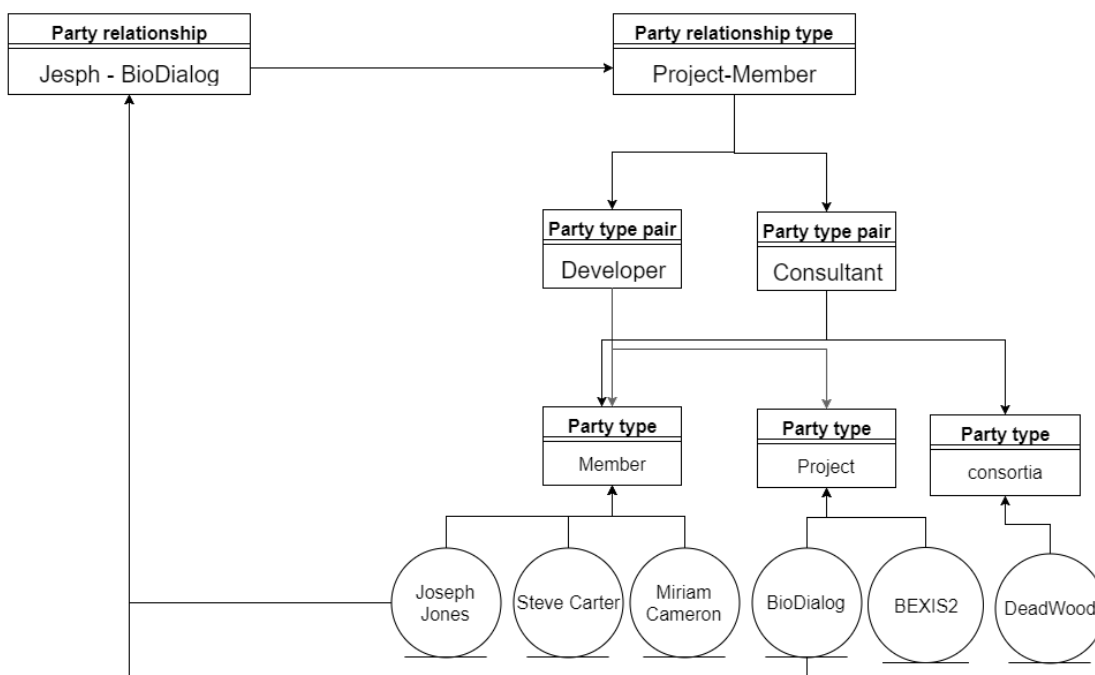
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1 Overview

Party package is managing all kinds of entities such as people, organizations, projects and etc. it is also managing the relationship between them. For example, one person is a part of a project for a certain duration. Furthermore, it is able to connect to the other modules which now it is connected to the security module and also it is able to import the definitions such as “partytypes”, “customattributes” and “relationshiptype” from an XML file.

2 Schema



3 Import definitions

3.1 XML

In the workspace a PartyTypes.xml is placed under “...\Workspace\Modules\BAM”. Here you can define “partytypes”, “customattributes” and “relationshiptype”.

3.1.1 PartyType:

```
<PartyTypes>
  <PartyType Name="personMember" DisplayName="Member person">
    <Attribute Name="FirstName" type="String" isMain="true" ></Attribute>
    <Attribute Name="LastName" isMain="true" ></Attribute>
    <Attribute Name="Gender" validValues="Male,Female"></Attribute>
    <Attribute Name="IdNumber" type="String" isUnique="true"></Attribute>
    <Attribute Name="Mobile" type="String" isValueOptional="true"></Attribute>
  </PartyType>
  <PartyType Name="Organization" >
    <Attribute Name="Name" type="String" isUnique="true" isMain="true" >
    </Attribute>
  </PartyType>
</PartyTypes>
```

- **PartyType attributes**
 - **Name:** Partytype name should be unique among the other party types. It is better to avoid spaces and special characters.
 - **[DisplayName]:** this Attribute is optional. If it is not available system will use Name to present the party name everywhere and it might be not user-friendly.
- **Attribute attributes:** Each party type has some custom attributes.
 - **Name:** Name of the custom attribute.
 - **[Type]:** By default if there is no attribute it consider it as “String” and will show a text box to user. It could be “bool” which shows two radio buttons with true/false values to user.
 - **[IsMain]:** every party should have a name and it comes from its custom attributes. If there are more than one “IsMain” attribute it will merge them together by space. In the picture above for “PersonMember”, name and family are the main fields for example. It is false by default.
 - **[ValidValues]:** If a dropdownlist needs , this attribute is useful. Values should be separated by a “,”.
 - **[IsUnique]:** By default it is false but if it is set to true it means that this attribute of this party should be unique among the other parties which has the same party type.
 - **[IsValueOptional]:** By default it is true but if it is set to false user has to fill this field.
 - **[Description]:** Shows some extra information as a tooltip to user.

```
<PartyRelationshipTypes>
  <PartyRelationshipType Name="organizationEmployment" DisplayName="Project" Description="for which
scientific institute is a person working for" IndicatesHierarchy="false" MaxCardinality="50"
MinCardinality="1" >
  <PartyTypesPairs>
    <PartyTypesPair AllowedSource="personMember" AllowedTarget="Organization" Title="employment"
Description="for which scientific institute is a person working for" />
  </PartyTypesPairs>
</PartyRelationshipType>
</PartyRelationshipTypes>
```

3.1.2 PartyRelationshipType attributes

- **Name:** PartyrelationshipType name should be unique among the others. It is better to avoid spaces and special characters.
- **[DisplayName]:** If it is not available system will use Name to present the party name everywhere and it might be not user-friendly.
- **[Description]:** It shows some info about this type to user in a tooltip.

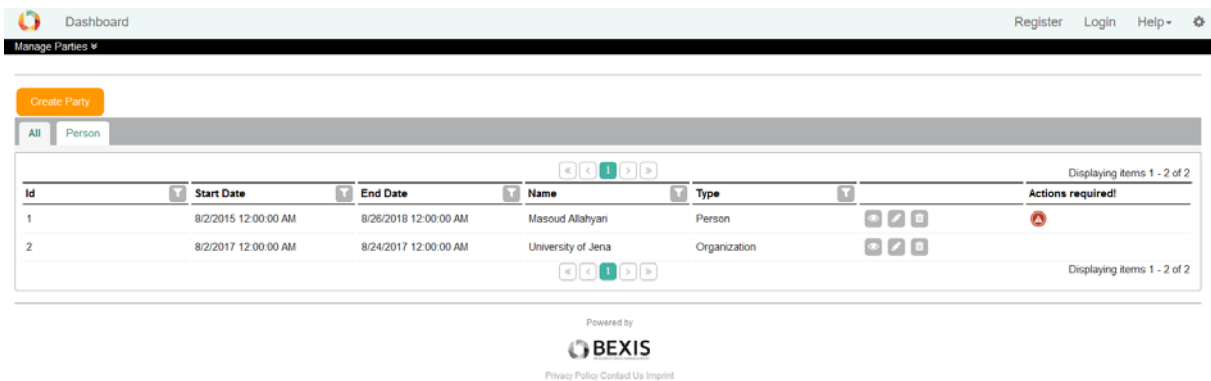
- **[IndicatesHierarchy]:** If it is set to true it means that there is a hierarchy relationship between all the pairs as the source is root and target is the child of it.
- **[MaxCardinality]:** By default it is unlimited and if it is set to a number it forces the user to not have more than this number relationships.
- **[MinCardinality]:** By default it is unlimited and if it is set to a number it forces the user to have at least this number relationships.
- **PartyTypePair attributes**
 - **Title:** The title of this pair.
 - **AllowedSource:** source party type is obligatory and should be exactly the same name as we defined for partytype.
 - **AllowedTarget:** Target party type is obligatory and should be exactly the same name as we defined for partytype.
 - **[Description]:** It shows some info about this type to user in a tooltip.

4 Manage parties

The user can see, create, edit and delete the parties

4.1 Manage parties

In this page you can see all the available entities and manage them. The red warning icon in action required column shows that this party needs some relationships to be valid.




Dashboard

Register Login Help -

Manage Parties

Create Party

All Person

| Id | Start Date | End Date | Name | Type | Actions required! |
|----|----------------------|-----------------------|--------------------|--------------|---|
| 1 | 8/2/2015 12:00:00 AM | 8/26/2018 12:00:00 AM | Masoud Allahyani | Person |  |
| 2 | 8/2/2017 12:00:00 AM | 8/24/2017 12:00:00 AM | University of Jena | Organization | |

Displaying items 1 - 2 of 2

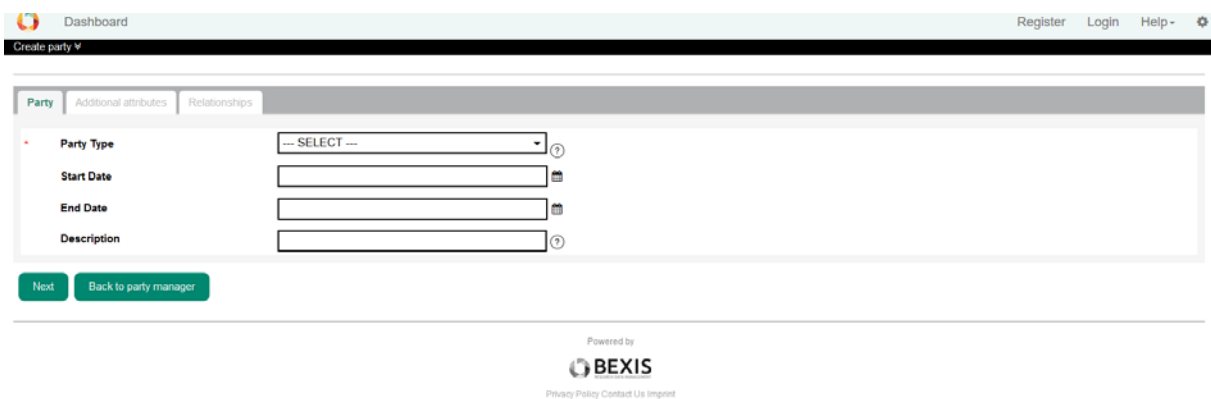
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4.2 Create and Edit

In first step you should select party type and its date range. Click on Next you will navigate to the next step.



Dashboard

Register Login Help -

Create party

Party Additional attributes Relationships

Party Type:

Start Date:

End Date:

Description:

Next Back to party manager

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Here depends on the selected party type you will see some additional attributes. You have to fill the required fields.

Dashboard Register Login Help -

Create party

Party **Additional attributes** Relationships

- **FirstName**
 - **Last Name**
Address
City
State
ZipCode
state
Phone

[Next](#) [Back to party manager](#)

For Some party types you have to make relationships. If you don't do that party will be saved but it's not valid. You can add relationship later as well.

Dashboard Register Login Help -

Edit party

Person **Additional attributes** Relationships

[Create](#)

| Title | First Party | Second Party | Start Date | End Date | Description | Type |
|------------------------|-------------|--------------|------------|----------|-------------|------|
| No records to display. | | | | | | |

These relationship types are required:

- 1 more relationship type of "Person Project".

[Back to party manager](#)

To edit a party you will navigate to this page again. You are able to change all the fields except party type.

4.3 Delete

Dashboard Register Login Help -

BEXIS 2.11.0 - Delete Party

Are you sure that you want to delete this party?

Party **Custom Attributes** Relationships

| | |
|--------------------|------------------------|
| PartyType | Person |
| StartDate | 1/1/0001 12:00:00 AM |
| EndDate | 12/31/9999 11:59:59 PM |
| Description | |

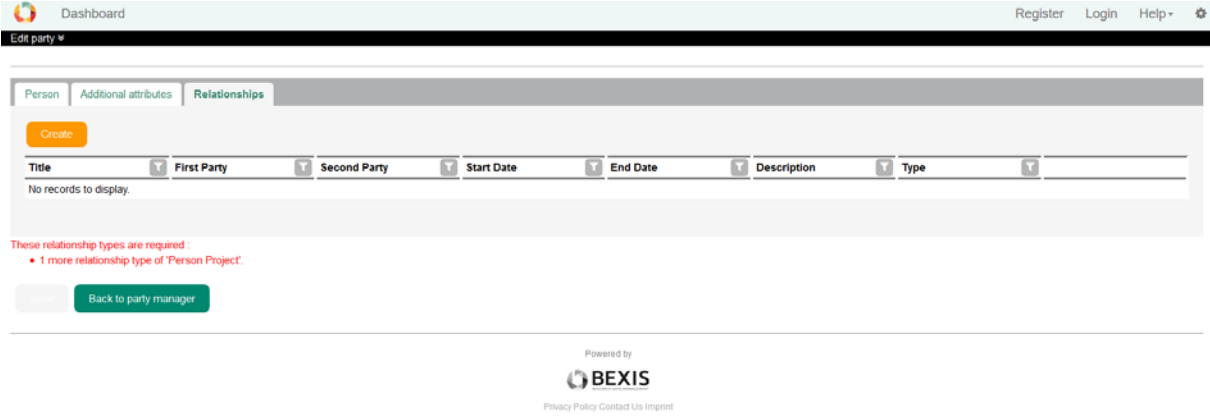
[Back](#)

[Delete](#)

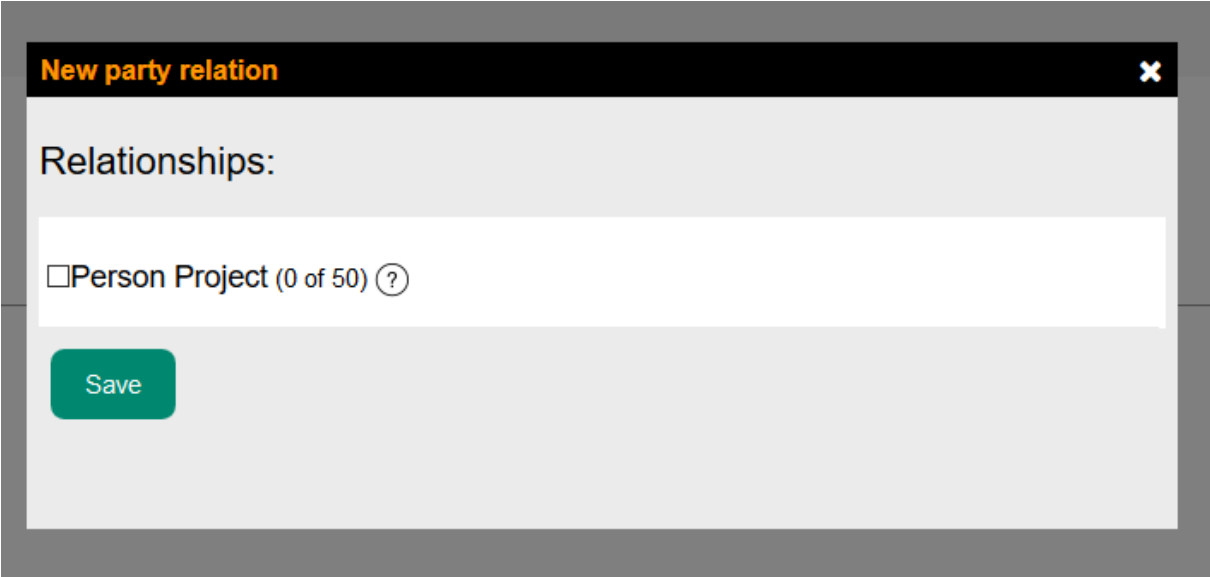
4.4 Manage Relationships

4.4.1 Create

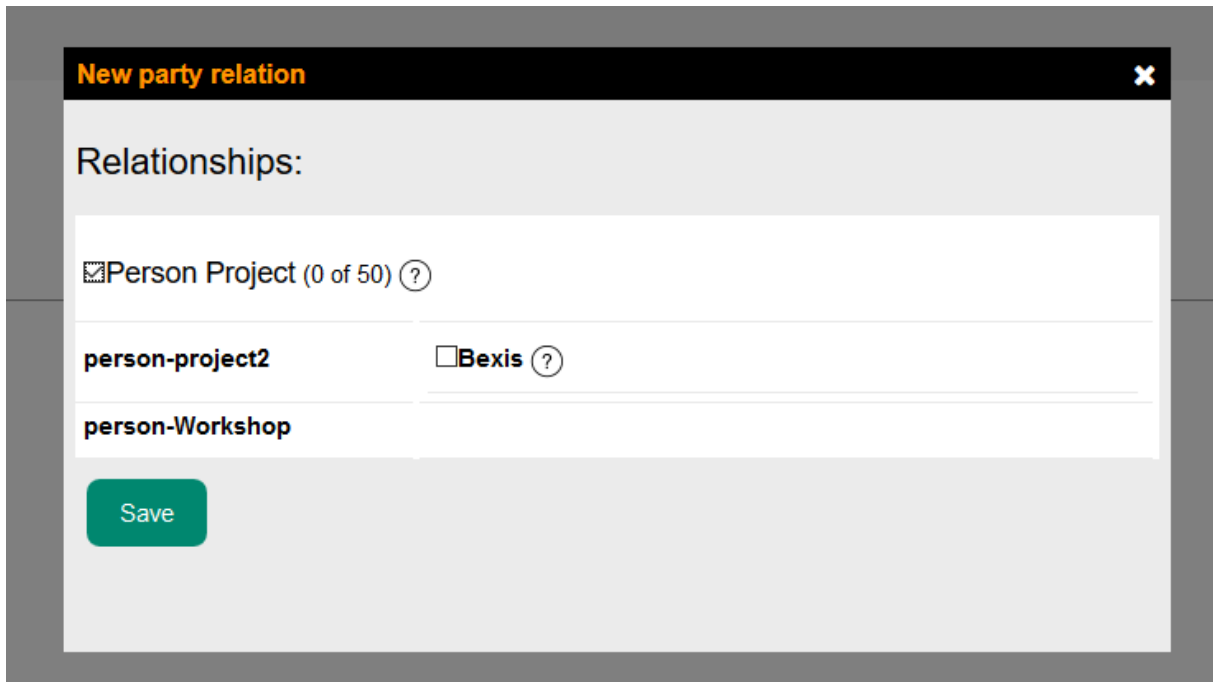
Every party could have some relationships with the other parties. Party relationships tab in edit or create party is to manage these relationships.



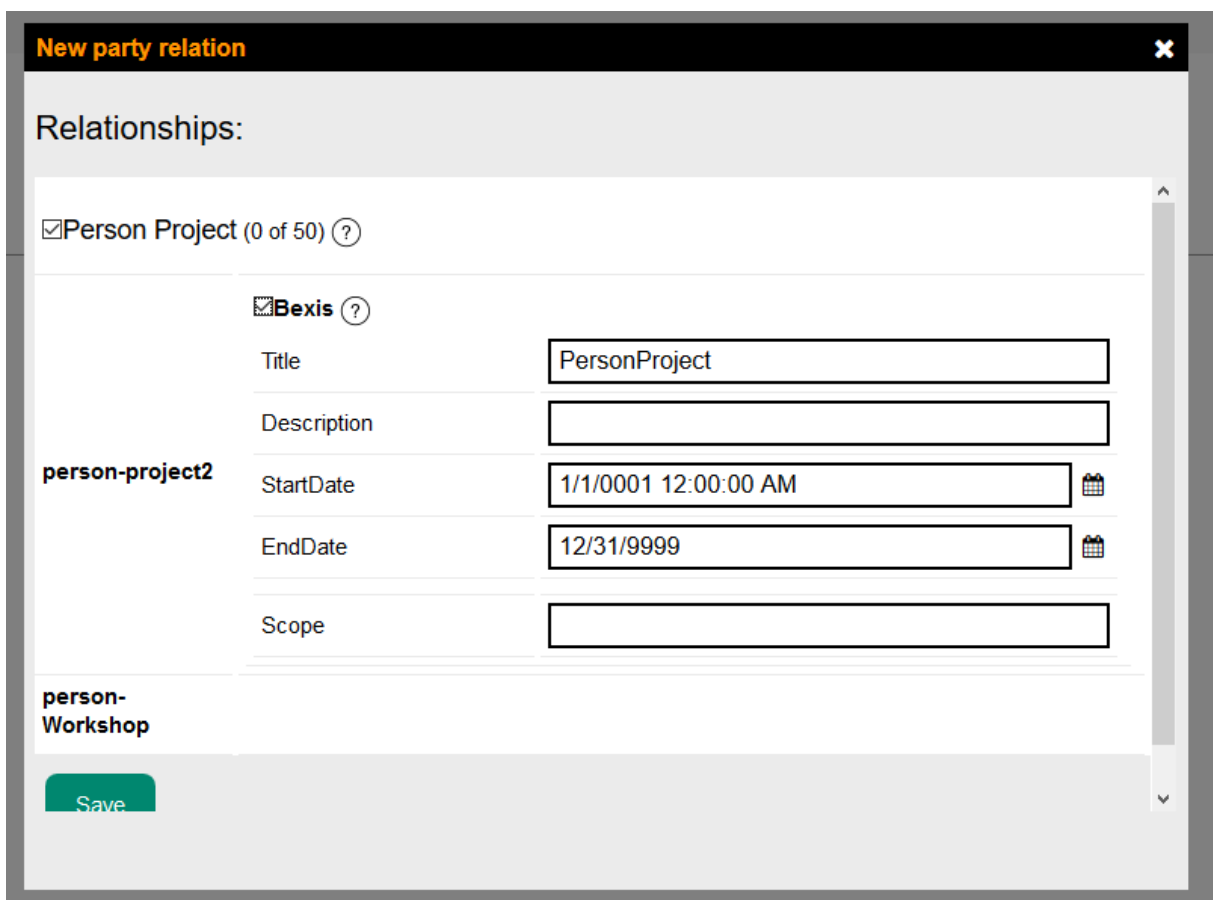
To create a new relationship, click on create and you see the following window. Here you see all the available party relationship types depend on the definitions which we already defined. The numbers in parentheses shows the number of current relationships and the maximum relationships that this party to this relationship type can have.



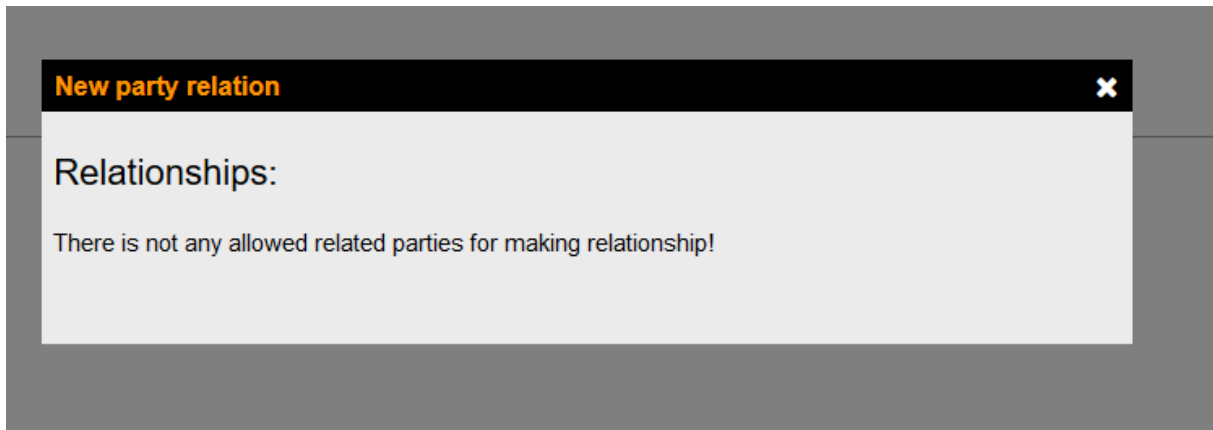
Clicking on one of them, you see some more options and available parties to make relationship.



Selecting a party it asks you to enter some information and by default it fills some of the fields. Title here is the title of this relationship, start and end date are important and will set the duration of this relationship. This duration should be fit to the duration of source party and the target party otherwise you will face to an error.

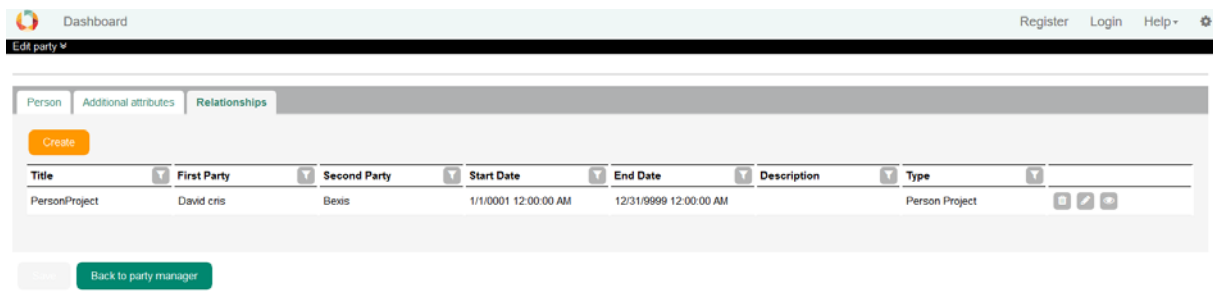


You will face to this error if there is no party or party relationship type defined.



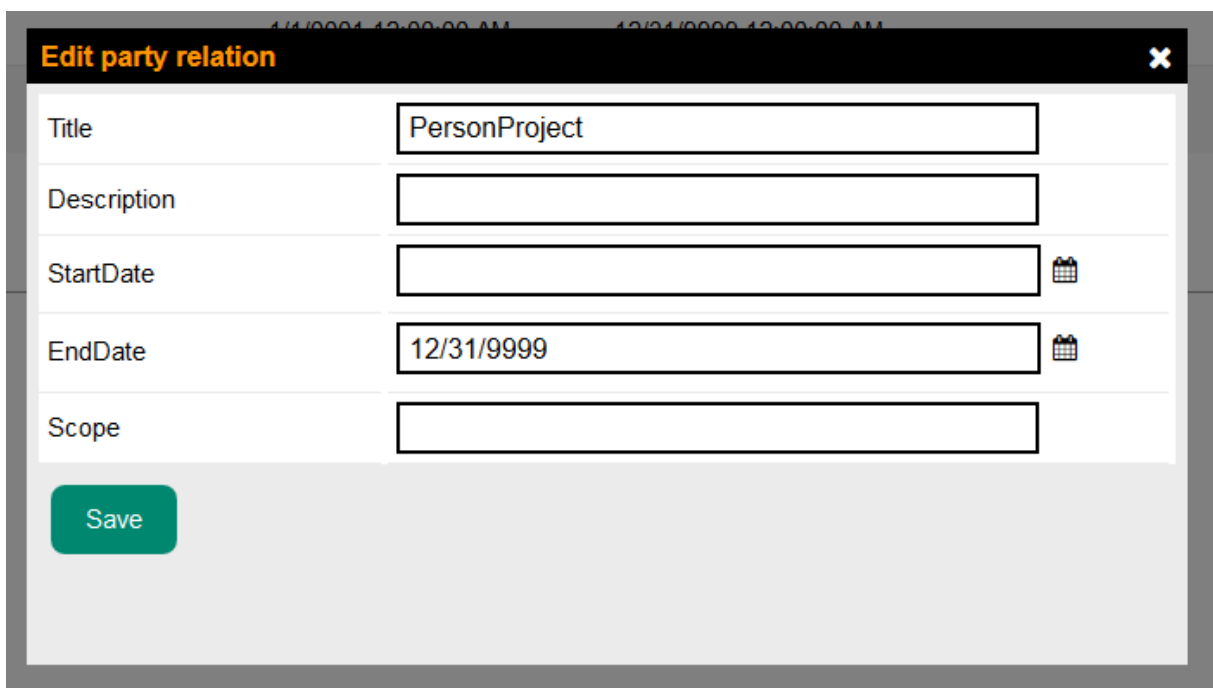
4.4.2 Edit and view a relationship

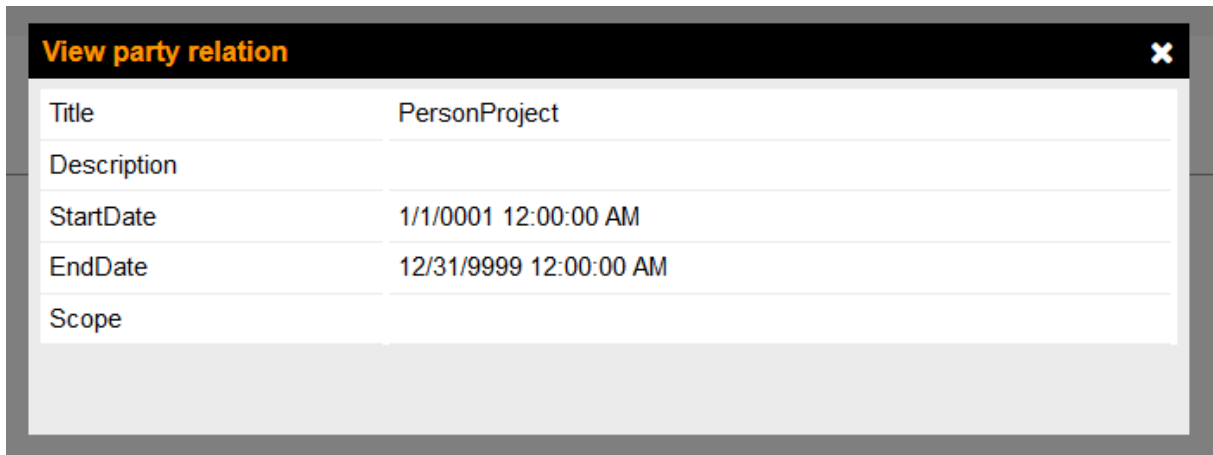
Clicking on edit icon (pencil figure) on last column of each relationships, you are able to edit the relationship. And clicking on the view icon (eye figure) , you are able to see the detail of a relationship.



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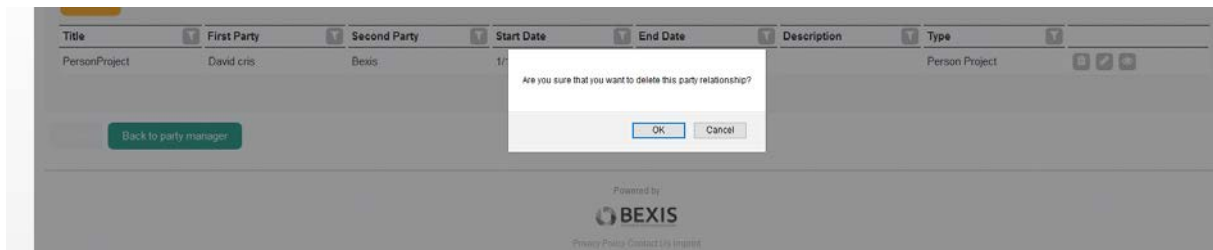
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4.4.3 Delete a relationship

Clicking on delete icon (trash figure) on last column of each relationships, you are able to delete a relationship if the minimum cardinality of its relationship type preserved.



5 Account registration

After creating an account, other information of user will save in party package . Before using this page we should set some configuration to clear the allowed party types which are related to the account and also the relationships which you want to ask user in registration page.



Registration

| | |
|--------------------------|---|
| * Account type: | <input type="text" value="personMember"/> |
| * FirstName | <input type="text"/> |
| * LastName | <input type="text"/> |
| Phone | <input type="text"/> |
| Mobile | <input type="text"/> |
| Fax | <input type="text"/> |
| Street | <input type="text"/> |
| ZipCode | <input type="text"/> |
| City | <input type="text"/> |
| ProjectLeader | <input type="text"/> |
| Url | <input type="text"/> |
| Organization-Employment: | <input type="text" value="---"/> |
| Project-Member: | <input type="text" value="---"/> |

Save

5.1 Configuration

Party types related to the account should be defined in setting.xml which you can find it in BAM workspace folder. Party types should be separated by a comma and each of them could have zero or multi allowed relationship. If the relationship type has one 'partytypepair' , the registration page will populate all the parties which has the same party type as this type pair. If the relationship type has more than one 'partytypepair', it will populate the allowed target of the 'partytypepair' which has "partyrelationshiptypedefault==true" this attribute and if it doesn't have this attribute it will use the

```
<?xml version="1.0" encoding="utf-8"?>
<settings>
  <!-- BAM settings -->
  <entry key="AccountPartyTypes" value="personMember:projectMember-
organizationEmployment,personGuest" type="string"/>
</settings>
```

first party type pair by default.

Example:

PartyType1:PartyRelationshipTypeTitle1-PartyRelationshipTypeTitle2,PartyType2