



- Accession Number setup (global only)
- Field formatting editor
- Storage tree definition setup
- Division information
- Discipline type and name
- Taxon tree definition setup
- Pre-loading of taxon tree data
- Geography tree definition setup
- Collection information
- Catalog number setup
- Accession Number setup (collection level)
- Summary and build

### **Post-installation decision making process**

- Setting up additional disciplines, collections
- Trees and tree definitions
- Form customization
- Reports
- Data conversion

## **Session 2: Program interface, layout and navigation**

### **Specify login**

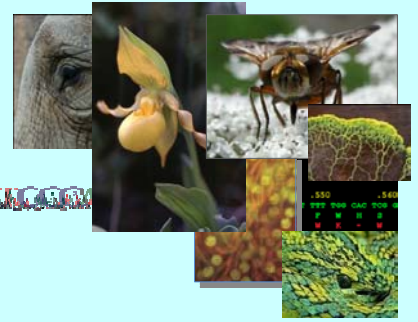
- Username and password (from Wizard or provided)
- Database name (from Wizard)
- Generate key process

### **Interface, layout and navigation**

- Main menu
- Task bar
- Simple search
- Side bar
- Main pane
  
- Tabs
- Drag and drop
- Record sets



# SPECIFY 6



## TRAINING AGENDA

### Session 3: Data entry and editing

#### Entering data

- Tables and sidebar configuration
- Field types
  - Text
  - Number
  - Formatted number
  - Date
  - Formatted/partial date
  - System pick list
  - User customizable pick list – user defined, field, table
  - Query Combo Box
  - Required fields
- Sub form types
- Carry forward
- Save and New
- Auto numbering
- Locality features
  - Lat Long preference pane
  - GeoLocate
  - Google Earth
  - WorldWind
- Series processing (later release)

#### Editing data

- Edit and View modes
- Batch edit (later release)

### Session 4: Working with Trees

- Taxonomy
  - Expanding
  - Find
  - Navigating tree
  - Split screen

- Add node
- Edit
- Move
- Synonym
- Associated Collection Objects and numbering
- Geography
- Storage
- Paleo
- Tree definitions
- Locking and unlocking trees

## **Session 5: Querying data**

### **Searching for data using the Query builder**

- Tables and Sidebar configuration
- Adding fields
- Adding aggregated or formatted tables
- Operators, Criteria, Sort, Show, Prompt
- Changing order of fields
- Removing fields
- Search Synonyms, Distinct, Count
- Wildcards (\*)
- Result bar options
  - Record set, form view, print grid, export, Reports

### **Searching for data using the Simple search**

- All vs. Distinct table
- Primary vs. related searches
- Wildcards (\*, ', ")
- Configuration
- Result bar options
  - Record set, form view, print grid, export, Reports

## **Session 6: WorkBench**

- Import data
- Data mapping
- Find – Ctl-F
- Add, remove rows
- Edit cells
- Map – satellite and Google Earth
- BioGeoMancer/GEOLocate
- Convert Geocoordinate formats

- Export data set
- Images
- Carry forward
- Form view and customization
- Uploading
  - Validate
  - Upload
  - Undo
  - Data integrity (future release)

## **Session 7: Interactions (Loans/Gifts/Borrows etc.)**

- Tables and sidebar configuration
- Accession and repository agreement
- Loan
  - Adding preparations – manual vs. record set
  - Returning loans
- Gift
- Borrow
- Exchange in and out
- Information request

## **Session 8: Preferences and Security**

### **Editing Preferences**

- Formatting
- System
- Trees
- Email
- Taskbar
- Google Earth
- MySQL
- Login Dialog

### **Working with Security**

- Security levels – Manager, Full access, Limited Access, Guest
- Multiple disciplines
- Creating new users – new and existing
- Group permissions
- Tables – View, Add, Modify, Delete
- Tools
- Preferences



- XML files
- User, User type, Collection, Discipline, Institution
- [discipline].views.xml (config/[discipline] directory), common.views.xml (config/common directory), global.views.xml (config/backstop directory)
- Eclipse (or other XML editor)
- Columns
- File structure – views and viewdefs
- Finding correct table
- Specify reload forms
- Specify debug forms

### **Publishing Specify data with GBIF IPT**

- IPT installation
  - Apache Tomcat
  - Memory allocation
  - IPT WAR file
  - Geoserver installation and configuration
- Specify configuration
  - Darwin Core schema selection
  - Mapping of fields
  - Schema export application of tab delimited data
- IPT and Specify integration
  - Source file import and upload
  - Viewing of data
  - TAPIR address
  - Publishing data

### **Future directions, collaborations and cool things!!**

- Collaborations
  - Morphbank/Morphster
  - BCoL
  - Filtered push
  - Botanical Image OCR
- iPhone/Android