Session 1: Installation/Implementation/Setup

Pre-installation decision-making process

Conversion:
- Existing Specify 5 users
- New users – conversion, wizard, WorkBench
- Data cleanup, parsing etc.
- Full Specify vs. Specify EZDB
- Mobile Specify – stand alone WorkBench

Installation

- MySQL 5.1
  - GUI Tool interface – database and user management
- Java
- Specify
  - Specify
  - Specify1G
  - SpWizard
  - SpBackupRestore
  - SpiReports
  - ImportFileSplitter
  - DataExporter
  - SchemaExporter

Data model and hierarchy information

- Institution, Discipline, Division, Collection, User Group, User

Wizard database creation

- MySQL root username/password and database name
- Master U/P
- Security
- CM username and password
- Institutional information
- Accessions
• 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
• Consortia

Session 2: Program interface, layout and navigation

Specify login

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

Interface, layout and navigation

• Main menu
• Task bar
• Simple search
• Side bar
• Main pane

• Tabs
• Drag and drop
• Record sets
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
  - Clone tool
- Series data entry - limit 500 records

Editing data

- Edit and View modes
- Batch identify

Session 4: Working with Trees

- Taxonomy
  - Expanding
  - Find
  - Navigating tree
- Split screen
- Add node
- Edit
- Move
- Synonym
- Associated Collection Objects and numbering
- Merge

- 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 (*)
- Higher level tree rank searches
- Result bar options – 20,000 row limit
  - 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
- Global search – **coming in future release**
Session 6: WorkBench

- Import data 4000 row limit
- Import file splitter
- Data mapping
- Find – Ctrl-F
- Add, remove rows
- Edit cells
- Map – satellite and Google Earth
- GEO Locate
- Convert Geocoordinate formats
- Export data set
- Images
- Carry forward
- Form view and customization
- Validation
- Create record set from data set – coming in future release
- Uploading
  - Validate
  - Upload
  - Undo
  - Data integrity (future release)
- Reports

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

Main menu

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

Security Wizard

- Used to check security preferences – master U/P
Session 9: Additional/Advanced topics

Georeferencing and visualizing data with Plugins

- Google Earth
- GEOLocate

Producing reports and labels

- SpecifyiReports
- Construct query
- Link to SpecifyiReports
- Adding fields
- Specify services

Manipulating the Schema config

- Captions
- Tables
  - Caption
  - Hiding tables
  - Usage notes
  - Table display format
  - Table aggregation
  - Web links
- Fields
  - Caption
  - Hiding field
  - Usage notes
  - Is Required
  - Field formatting
- Localization – different languages
- WB schema config

Containers and Relationships

- Relate collection objects in same and different collections
Customizing forms

- 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
  - Publishing data

SGR
Lifemapper

Future directions, collaborations and cool things!!

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