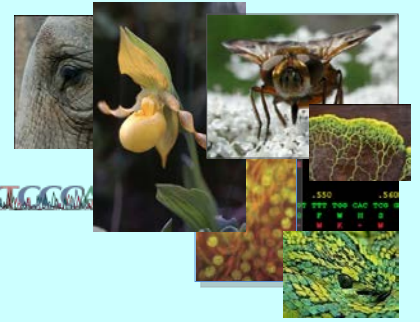




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TRAINING AGENDA

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 5.6
 - GUI Tool interface – database and user management
- Java 7
- 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

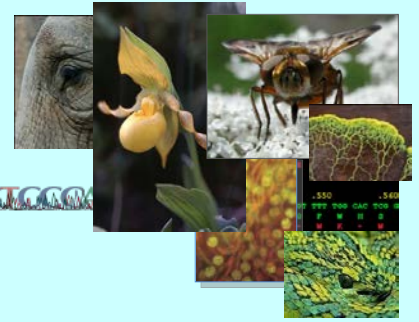
Interface, layout and navigation

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

- Tabs
- Drag and drop
- Record sets



SPECIFY 6



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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
 - 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 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

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
- Specify 6.5
 - Image manipulation
 - Web search
- Specify 7 Thin client