Specify for Paleo Workshop Agenda (2014-05-20/23):

Day 1

Specify installation: A Specify demonstration paleontology database will be used for the workshop and will be distributed as a virtual appliance (VM) before the workshop. Instructions for installation can be found here - https://www.idigbio.org/wiki/index.php/Specify_Appliance_virtualbox_paleo.

After short introductory presentations on Specify (Andy Bentley) and iDigBio (Deb Paul) we will briefly outline installation scenarios and the setup Wizard to install Specify and related taxonomic authority tables, pre- and post-installation decision making, explanation of terms, login credentials, and interface layout and navigation to familiarize attendees with the necessary steps that will be required at their home institutions.

All participants should come prepared with a laptop with the Specify virtual appliance installed and running. Supported operating systems include Mac OS, Windows, and Linux…

Helpful reading for future installation

- **Hardware** and **software** requirements - http://specifysoftware.org/content/specify-6-hardware-and- software-requirements
- Downloading and installing **MySQL on Windows** - http://specifysoftware.org/sites/default/files/Downloading%20Installing%20Configuring%20MySQL%20 on%20Windows%20for%20Specify.pdf
- Downloading and installing **MySQL on Mac** - http://specifysoftware.org/sites/default/files/Downloading%20Installing%20and%20Configuring%20Jav a%20and%20MySQL%20on%20MacOS%20X%20for%20Specify.pdf
- **Specify wizard** step-by-step instructions - http://specifysoftware.org/sites/specifysoftware.org/files/specify_setup_wizard.pdf

Day 1 will concentrate on general Specify components for daily use - data entry (field types, subforms and various options to facilitate rapid data entry) and editing, working with trees (taxon, geography and storage), querying data (query builder and simple search), interactions (gifts, loans, borrows, accessions etc.), user and system preferences and security (user setup and configuration) as well as use of the integrated Geolocate georeferencing engine. Basic schema configuration options (changing captions, usage notes etc.) will also be covered. The goal of day 2 is to get participants to a point where they can effectively manage the basics of a collection database.

Day 2

The Specify Workbench: Focus will be on cleaning data that is stored in spreadsheet format, mapping data to the Specify schema, importing and exporting spreadsheet data via Workbench. Participants will be expected to have *at least three spreadsheets* of their own data to upload into the Specify database installed in Day 1.

Helpful reading

- Guidelines for **importing external data into Specify 6** - http://specifysoftware.org/sites/default/files/data_import_guide.pdf

- Guidelines for **cleaning data before conversion into Specify 6** (for Specify 5 users but also has some general comments on cleaning data) - http://specifysoftware.org/sites/specifysoftware.org/files/Guidelines%20for%20Converting%20from%2 0Specify%205%20to%20Specify%206.pdf

Day 3

Advanced topics: **Using iReport** for printed output - reports and labels, working with the schema configuration to format table output and aggregation and creating customized fields (pick lists, formatted fields and web buttons), customizing forms to add, remove, move fields and configure data entry forms, relating objects and collections using containers (multiple objects connected together through a single sheet or rock etc.) and relationships (relating two collections together - host/parasite, tissue/voucher etc.).

Day 4

Publishing your data with the GBIF **IPT** client, setting up the Specify 6 web client, Lifemapper, Image and attachment handling and bulk import of attachments. We will also introduce two ongoing projects for future release - the Specify 7 thin client (browser based) and iPad applications.

Helpful reading

- **Publishing data with IPT** - http://specifysoftware.org/sites/specifysoftware.org/files/Publishing%20Specify%20Data%20with%20IP T.pdf