

Workshop agenda (2013-08-12/16):

Day 1—Installing Specify: Focus will be on installing all the necessary Specify components (Specify, Java, MySQL) using the Specify installation 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.

All participants should come prepared with a laptop on which Specify can be installed and an initial set of data and/or data files from their collections for testing and learning data entry strategies. Supported operating systems include Mac OS, Windows, and Linux. The fundamental goal for the end of day one is a working copy of Specify with default settings.

Helpful reading

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%20on%20Windows%20for%20Specify.pdf>

Downloading and installing MySQL on Mac - <http://specifysoftware.org/sites/default/files/Downloading%20Installing%20and%20Configuring%20Java%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 2—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 3—Working with 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%20Specify%205%20to%20Specify%206.pdf>

Day 4—More 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 5—Publishing your data with the GBIF IPT client, setting up the Specify 6 web client, facilitating herbarium data entry with Scatter, Gather, Reconcile (SGR), 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%20IPT.pdf>