



Getting started

Documentation for the FSC Identikit



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2 Introduction

The FSC Identikit is an open source framework for creating new identification resources that run as 'web apps' in web browsers. You can use the Identikit to create a new ID web app simply by creating a knowledge-base using a spreadsheet.

But it's not always convenient or desirable to run your app on a website, especially while you are developing a new knowledge-base. The good news is that you don't have to. Instead, you can get your own computer to run as a little mini-webserver and run it locally.

These instructions tell you:


1. How to install the Identikit on your computer.
2. How to set up your computer to run web apps locally.
3. How to run the visualisations web page.
4. How to start a new knowledge-base and web app of your own.

3 Installing the FSC Identikit

These are the steps for installing the Identikit on your computer.

1. **Download the latest version of the Identikit** from <https://github.com/burkmarr/tombiovis/releases> - download the latest '**Source code (zip)**' file.

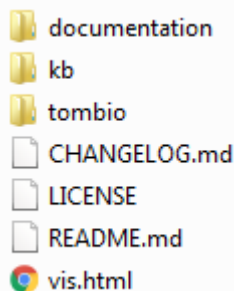
Downloads

 Source code (zip)



2. Unzip the Identikit zip file to a convenient location on your computer.

The Identikit is delivered as a zip file. Once you've downloaded and unzipped this file you will find a folder called something like: **tombiovis-1.2.3** (the version number will be different). If you have a look in this folder you will see some folders and files like those shown below.





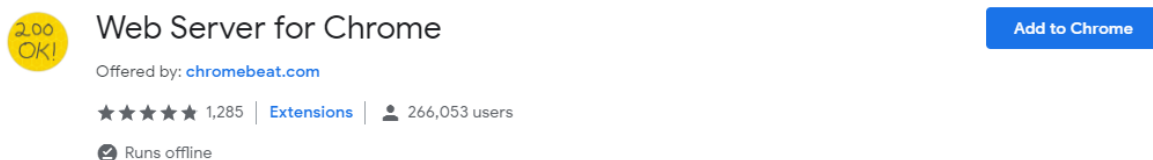
4 Set up your computer to run web pages locally

There are many ways you could set up your computer to run a local web server¹. Early versions of the Identikit suggested using a program called 'Node.js' to do this, but we now recommend a much simpler cross-platform way of doing it with Google Chrome.

The 'Web Server' add-in is a simple tried, tested and trusted add-in to Google Chrome. It is simple to install and run on any platform that is supported by Chrome (including Windows, Mac and Linux).

1. If you don't already have Google Chrome installed on your computer, do that first.
2. Install Web Server for Chrome. For some reason this can't be found by browsing the Chrome Web Store. Instead, cut and paste the following URL into Chrome's address bar and then click the 'Add to Chrome' button.

<https://chrome.google.com/webstore/detail/web-server-for-chrome/ofhbbkphhbklhfoeikjpcbhmlcggigb>



Note that resources created with the FSC Identikit can be viewed on any modern browser, not just Chrome, so users of your visualisations have a free hand when it comes to browser choice. But as a knowledge-base developer, Chrome provides the best environment for you to work in.

¹ Note that running a local web server on your computer is not a security risk! It does not make your computer accessible to the outside world over the internet. It simply enables you to run a web application from your own computer, rather than over the internet.

5 Run the visualisation web page

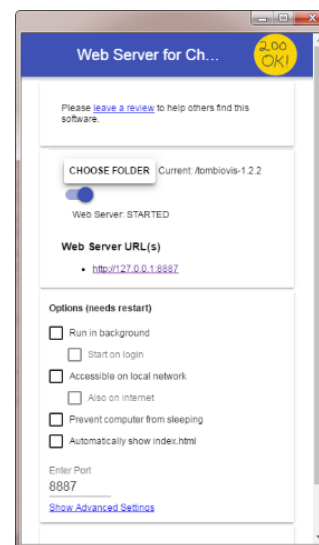
These steps show you how to run the visualisation app on your computer.

1. From Chrome, start the Web Server add-in and use the *Choose folder* button to select your folder (e.g. tombiovis-1.2.3).
2. Start the Identikit by entering the following URL into your web browser: <http://127.0.0.1:8887/vis.html>

Step 1 starts the local web server. To start a Chrome add-in, click the *Apps*

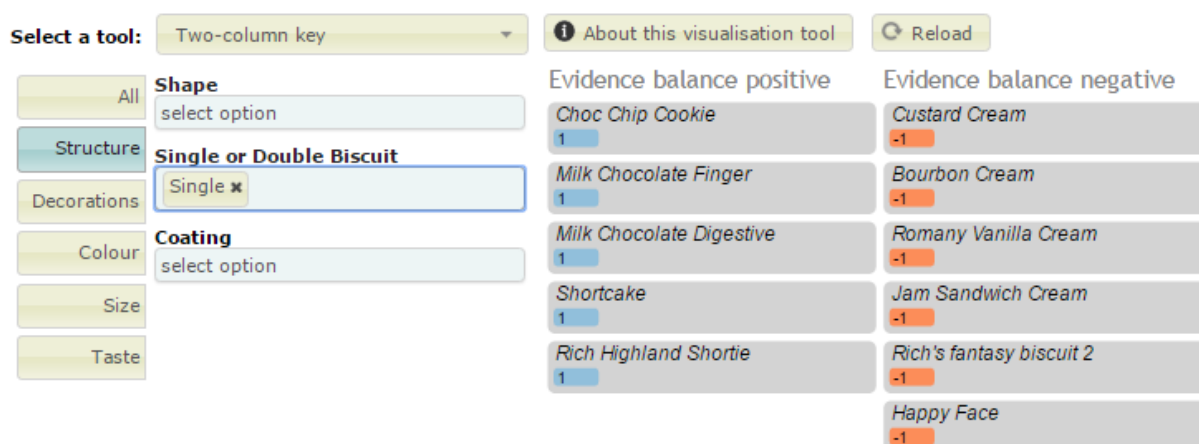


icon shown on the left which will show a tab in Google Chrome with your installed extensions. Then click the image corresponding to the Web Server add-in (also shown on the left). You can minimise the web server window whilst working with the Identikit. When you close the web server window, it will stop running.



Step 2 starts the visualisation web app. It is running on the example knowledge-base provided with the Identikit – the biscuits knowledge-base.

Repeat these steps whenever you need to start the local web server and the visualisation app.



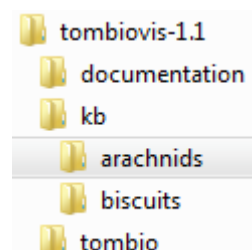
The screenshot shows the visualisation web app interface. On the left, there is a 'Select a tool:' dropdown menu set to 'Two-column key'. Below it are several buttons: 'All', 'Shape' (with a 'select option' dropdown), 'Structure', 'Decorations', 'Colour' (with a 'select option' dropdown), 'Size', and 'Taste'. The 'Shape' dropdown is currently set to 'Single or Double Biscuit', and the 'Single' option is selected. On the right, there are two columns of biscuits. The first column is titled 'Evidence balance positive' and lists: 'Choc Chip Cookie' (1), 'Milk Chocolate Finger' (1), 'Milk Chocolate Digestive' (1), 'Shortcake' (1), and 'Rich Highland Shortie' (1). The second column is titled 'Evidence balance negative' and lists: 'Custard Cream' (-1), 'Bourbon Cream' (-1), 'Romany Vanilla Cream' (-1), 'Jam Sandwich Cream' (-1), 'Rich's fantasy biscuit 2' (-1), and 'Happy Face' (-1).

6 Create a new knowledge-base and visualisation

It is unlikely that you downloaded the Identikit to obtain an identification resource for biscuits! It's more likely that you want to have a go at creating a new knowledge-base of your own to drive a new ID resource. Here's one way you can make a start.

(You are given only the very briefest introduction to creating a knowledge-base below. For a proper guide you should read the 'Building a knowledge-base' document included with the Identikit.)

1. In the 'kb' folder under the main folder, **create a new folder** corresponding to the resource you'd like to make, e.g. 'arachnids'.





2. **Copy** the file '**kb/biscuits/biscuits.xlsm**' into your new folder and rename it, e.g. '**kb/arachnids/arachnids.xlsm**'.
3. In the main folder, you will notice a file called '**vis.html**' – this is the main web app page. (It's a very lightweight little thing – the Identikit loads your visualisation into this dynamically.)
Open this file in a text editor. In some text editors, it appears nicely formatted similar to the one show below.

```
<!DOCTYPE html>
<html lang="en">
<head>
  <meta charset="utf-8">
  <meta name="viewport" content="width=device-width,initial-scale=1">
  <title>FSC Identikit</title>
  <script>
    //Legacy method (still supported)
    //var tombiopath = "tombio/" //deprecated from 1.6.0
    //var tombiokbpath = "kb/biscuits/" //deprecated from 1.6.0

    //Set options to tailor page configuration (from 1.6.0 onwards)
    var tombiovis = {
      opts: {
        hideVisDropdown: false,
        //tools: ["vis1", "vis2", "vis3", "vis4", "vis5"],
        //selectedTool: "vis1",
        //lastVisualisation: "vis1",
        toolconfig: {
          keyinput: {
            selectedGroup: "Structure",
          },
          //vis4: {
            //  subTitleChar: "CommonName"
          //}
        },
        //tombiover: "refresh-1",
        checkKB: true,
        devel: true,
        tombiopath: "tombio/",
        tombiokbpath: "kb/biscuits/"
      },
    }
    [...]
  </head>
  <body>
    <h1 id="tombiod3-header">FSC Identikit test</h1>
    <div id="tombiod3"></div>
    <div id="tombiod3-footer" style="width: 100%">footers</div>
  </body>
</html>
```

In other text editors, e.g. Notepad, it may look rather more like this:



```
vis.html - Notepad
File Edit Format View Help
<!DOCTYPE html><html lang="en"><head>    <meta charset="utf-8">    <title>Tom.bio ID
Visualisation</title>    <!--Change the tombiopath variable to match the installation
environment-->    <script>var tombiopath = "tombio/"</script>    <!--Change the tombiokbpath
variable to pick up the KB you are working with-->    <script>var tombiokbpath =
"kb/biscuits/"</script>    <!--Change the path to load.js to match the installation
environment-->    <script type="text/javascript" src="tombio/load.js"></script> </head><body
leftmargin="100px">    <h1>Tom.bio ID Visualisation test</h1>    <div id="tombiod3"></div>
<h1 style="width: 100%">footers</h1></body></html>
```

We recommend a lightweight and free text editor called Notepad++. This is very user-friendly for editing HTML – it will colour text and tags different and make it much less likely that you will make mistakes. You can download it here: <https://notepad-plus-plus.org/download/v7.5.6.html>. When you open this document with Notepad++, it looks a little like this:

```
<!DOCTYPE html>
<html lang="en">
<head>
    <meta charset="utf-8">
    <meta name="viewport" content="width=device-width,initial-scale=1">
    <title>FSC Identikit</title>
    <script>
        //Legacy method (still supported)
        //var tombiopath = "tombio/" //deprecated from 1.6.0
        //var tombiokbpath = "kb/biscuits/" //deprecated from 1.6.0

        //Set options to tailor page configuration (from 1.6.0 onwards)
        var tombiovis = {
            opts: {
                hideVisDropdown: false,
                //tools: ["vis1", "vis2", "vis3", "vis4", "vis5"],
                //selectedTool: "vis1",
                //lastVisualisation: "vis1",
                toolconfig: {
                    keyinput: {
                        selectedGroup: "Structure",
                    },
                    //vis4: {
                    //    subTitleChar: "CommonName"
                    //}
                },
                //tombiover: "refresh-1",
                checkKB: true,
                devel: true,
                tombiopath: "tombio/",
                tombiokbpath: "kb/biscuits/"
            },
        }
    </script>
    [...]
</head>
<body>
    <h1 id="tombiod3-header">FSC Identikit test</h1>
    <div id="tombiod3"></div>
    <div id="tombiod3-footer" style="width: 100%">footers</div>
</body>
</html>
```



4. You need to direct the app page to look for your new knowledge-base rather than the biscuits one. To do that, **change the path of the knowledge base folder to the folder you just created** by changing the word 'biscuits' to the name of your new folder (e.g. 'arachnids') – see text highlighted in yellow above.
 5. **Save the changes** you made to 'vis.html'.
 6. Open your new knowledge-base Excel file (e.g. arachnids.xlsm) for editing. (You need to ensure that macros are 'enabled' – so respond accordingly to any questions.) On the 'config' worksheet, **change the values** of the **title**, **year**, **authors**, **publisher** and **location** keys. (You can leave the values of publisher and location blank if you like.) Also **delete** one of the **release history** lines and edit the remaining one to something suitable.
- | | | | |
|-----------|----------|-----|------------------------------|
| title | metadata | yes | Family Circle Biscuits |
| year | metadata | yes | 2016 |
| authors | metadata | yes | Bell, C. |
| publisher | metadata | no | Field Studies Council |
| location | metadata | no | Preston Montford, Shrewsbury |
7. Go to the 'macros' worksheet and **click the 'Save worksheets as CSV' button**. This creates five CSV files in the same folder as your knowledge base with the names, taxa.csv, characters.csv, values.csv, media.csv and config.csv, corresponding to the five worksheets of the same name in the knowledge-base. The Identikit reads these CSV files – not the spreadsheet – so you must repeat this step every time you modify the knowledge-base.
 8. At this point you should be able to **run the web app** (see 'Run the visualisation web page' above) or, if it is already running, just **click the 'Reload' button**, to pick up the new knowledge base.

Reload

Currently it will look just like the biscuits knowledge-base because you haven't changed anything except some of the configuration metadata. To confirm that you are picking up your new knowledge-base, select the 'About the knowledge-base' option from the 'Select a tool' drop-down. You should see some information reflecting the changes you made on the config worksheet.

Select a tool:

About the Knowledge-base ▼

Arachnids visualisation

Citation

Burkmar, R (2016) *Arachnids visualisation* (Version 0.1) [Knowledge-base] (for Tom.bio Framework for ID visualisations). Accessed Fri Nov 25 2016. <http://localhost:8080/vis.html>

Knowledge-base revision history

Current version: 0.1

Date	Version	Notes
25/11/2016	0.1	Rich test installation

At this point you've create a new knowledge-base and you understand how to run a visualisation from it on your computer and make changes. All that's left to do now is populate the knowledge base with real information! For instruction on that, read the 'Building a knowledge-base' document.



7 Creating a version that uses the mobile-first multi-access key

Version 1.8.0 of Identikit introduced a new visualisation – vis6 – which is a multi-access key specifically designed to work well on mobile devices.

For convenience, you are also supplied with a second top-level web-app template – '**vism.html**' – that you can use as a template for creating/testing your own resource with the mobile multi-access key.

Follow the same steps to edit this as described above for vis.html to ensure that the app points to your newly created knowledge-base. Then if everything is correctly set up, as previously described, you will be able to run the mobile-first key by putting this URL in your browser:

<http://127.0.0.1:8887/vism.html>