

# Specify 6 workshops in Australia Q&A

**October 2010**

Andy Bentley conducted four workshops in Melbourne, Perth and Canberra to 40 participants from 30 institutions.

More questions?

**Specify 6:** Andy Bentley [ABentley@ku.edu](mailto:ABentley@ku.edu)

**ALA and Specify 6:** John Tann [john.tann@austmus.gov.au](mailto:john.tann@austmus.gov.au)

1. Can we upgrade from old versions?  
Major breakpoint between Specify 5 and Specify 6, but upgradable before that point between versions.
2. Who puts the base taxonomy into the database?  
Can use Tree of Life, can enter your own, and can import your existing database taxonomy.
3. How do you keep up to date?  
Can't do updates externally, it's only from your own database.
4. Can you set this up for internal use only?  
Yes, you don't share it to the world, but you can control what you share.
5. Can I obscure/hide a species?  
Yes.
6. Timeline for Oracle integration?  
Don't know, looking for Microsoft SQL Server first, possibly Oracle afterwards – should work, though, timeline unclear)
7. Batch upload, and build a set of records to change, these are both critical?  
Will be added pretty soon, meeting in a few weeks to prioritise.
8. How does Specify software/Specify convert from Texpress?  
You would map fields from Texpress to the Specify data model – 8 months for Melbourne herbarium – MEL used the MySQL mirror of their main Texpress database and put to Specify.
9. How do you handle pre-existing database with some data correct, some with typos etc – is there a validation?  
Only a validation for format, not values in free text.
10. Can you validate picklist columns?  
Yes, you can do that and validate for that, it could happen pre- and post-load, you need to do a lot of work on this yourself, though.
11. A lot is big picture stuff on distribution – we do small picture on traps and locations, can you manage this local data in that system, can you track and analyse on transects?  
No analysis in Specify for that, but you would set up collecting events at a local scale not a larger scale.

12. Have people done that?  
Yes, entomology collections have done that, each trap is a collecting event, a number of collections work on a “lot” or a “specimen” collection, you can work on either system in a Specify database, can even do tissue/specimen relationships, parasite/host relationships.
13. We have stored a lot of “collecting events”, and our data has been captured as individual collecting events for each specimen, how do we deal with legacy data?  
Can do if data entered in same way, you would need to do a lot of cleanup before hitting Specify, you would need to clean up the collecting events, and then import and connect all the collecting events into one.
14. Can we do it over time?  
Not yet, looking at doing that in future versions, not in place yet, can do on the fly anyway by manually editing – loads of people have legacy problems. Obviously already in place for taxonomy using the tree view.
15. We have a separate external taxonomic list, can we reference that?  
No, you’d have to import it into the Specify database, can’t link and update externally, but you might be able to download at regular intervals, but need to know about the specimens being updated, etc, something looking at but not in it yet.  
*ALA may fund a programmer to work on that. ALA could consider funding further development of third party applications.*
16. We have image data stored at PaDIL – ALA is putting out a new version, our images are stored over there in PaDIL – can we link to the web site at PADIL?  
If you have a static URL for an image, you could attach it to each of the records.
17. There is usually one specimen per image; can we have multiple records to one URL?  
Yes, or you could attach the web link to the taxon.
18. Given security, does the system track when I make bulk changes using the tree view?  
Not yet, but is asked for by a lot of people.
19. We sometimes don’t know genus, so if you enforce taxonomic levels all the way how do we do that?  
Yes, you can enforce what you like, and you can add morphospecies codes, etc, in the tree to allow that.
20. Can you change orthography - e.g. brackets around subgenus?  
Yes, you can do those additional things when in the system, just not in this initial setup.
21. Again about taxonomy loading, can you do it through here?  
Yes, but you can’t re-import, you need to manage this in workbench.
22. Most of our taxonomy has been built on the fly, as we database, can we import what we have into here?  
Yes, you can get the taxonomy from your database through interrogation and conversion and pull it into the Specify database later.

23. Does this version expire and will vanish?  
No you have it, it will keep being installed later on as well, and the software is being reviewed and re-released quickly, and can respond to bug fixes in a rapid way.
24. How do you change dates formats for forms?  
You need to go back into the XML files that control the forms. You can go into the XML forms and add them and change them in the underlying XML files, this is a service that Specify will provide, you can change a single XML file and then you can reinstall it, can also grab forms from other people and integrate those)
25. Attachments? Can be anything?  
Yes, but if you attach an item from your local machine, and have an area setup, it will copy the file to the network area, and will automatically create a thumbnail, and these will be able to be shown later.
26. I added two people to the determiner and it's not there?  
Weird bug, should work, demonstrated it on the screen, you need to type something into the box otherwise it will not work.
27. Can I remove old locations?  
Yes, unless they are being used by records. If there are no events recorded against it you can delete them. Going to be reworking GEOLocate into Java, and then will be incorporated into Specify later.)
28. If you are not working off a map, and enter a lat/long, will it enable GEOLocate then?  
No it will work all the time.
29. To paraphrase, want to check my co-ordinates using GEOLocate?  
GEOLocate only searches on the text descriptions of the locality names.
30. Can you merge taxonomy entries?  
Can't merge taxonomy, but are looking at it, it's already in development and will be out in a couple of releases.
31. Can you do "or" queries?  
No.
32. Can you map a binomial column to two fields?  
No, work it through before in Excel.
33. How do you cope with some records identified to subspecies, and some not?  
Break your data up into different data loads.
34. We collect things as we go, identify things early, will workbench use give them accession numbers?  
No, unless you upload the data. Could have a field on the form if you have a specimen or not, and then check for that you keep, of have two separate collections, and could store collections separately from observations, etc.
35. Loans – how does that work?  
Demonstration done, impressive!

36. Date formats again – can you set a system preference for dates?  
No, this has to be handled by the forms independently. Note that the formatting system preference is not the data preference on the forms themselves.
37. Can you change shortcuts?  
There are generic ones, think that they are stored in an XML file that you can alter.
38. Can you work in two collections at once?  
No, each collection is separate, it all works on a collection basis, but there is a bunch of ways to do this, you can do this however you want.
39. How do I see the other entomology collections in my institutions?  
You could go look at ALA, GBIF, etc and look through them, run portals etc, what is going on, can set up portals at all sorts of different levels, can have geographic, taxonomic, institutional scope portals – but use LSIDs.
40. Where to from here?  
Specify can help support you and do your work. ALA might consider paying for Specify's time, or there are others like Niels, etc, who can actually do the work for you.
41. How long will it take to migrate legacy data?  
Depends on how much you do – if you do the majority of the work then it's simpler for Specify and much easier to do, the NIWA process took about a week to move from Specify 5 to 6, probably 1-2 weeks for an average legacy collection.
42. Does your ability to convert depend on familiarity with source?  
Specify has converted everything, Biota, BioLink, Texpress, Access, FileMaker, Excel, etc.  
Niels recommendation: *Use workbench and start testing using a set of 2,000 records into the workbench, start playing around with it, and see what you could do.* Also check out the <http://www.rbg.vic.gov.au/dbpages/specify/> that Niels and Alison have put together, which is a good reference.
43. What if we need to share data with DAFWA, how do we resolve the security issues and how that occurs?  
Depends on your systems, and your user connections, firewalls, etc. Can use VPN but it is slow.
44. Worried about security on server, etc?  
You need to build your case with your own departments.
45. What about databases in the cloud?  
On the horizon, Rod has it working on the Amazon cloud; charged per input/output.
46. How much interest generated from others in Australia?  
A lot, some bigger institutions want to use it, some smaller ones found it too complex – about 30 different Australian institutions are being represented at these workshops. A lot of organisations that are using EMu and having major problems are moving to Specify.
47. Batch processing of records. Is there an undo button?  
No

48. Audit trail. Does it exist?  
No it would add a huge overhead. Not being looked into.
49. Can you record whether a specimen/tissue/feather has been sighted?  
Yes. You can use a field for this.
50. Live specimens. Can you connect collection specimens to live specimens?  
No. Management of living things require many more components (watering, feeding, health, etc). Not suited to collection management.
51. Competitors. Are KE EMu and Vernon seen as alternate products?  
Yes.
52. Migration. (Q for Niels and Alison). How much effort to move Texpress data to Specify 6?  
Months. Much time is spent cleaning data. You want to start with a clean dataset. Strategy for migration involved setting up a snapshot copy of original Texpress database into Specify. It was then a process of determining appropriate mapping.
53. Clean up. (Q for Niels and Alison). What processes did you use to clean up?  
String manipulation; mostly manually work.
54. Names lists. Can you use a locally determined taxonomy?  
Only one taxonomic authority is used for the database. ALA may be able to help with linking to an external authority.  
Niels: I don't think you should have taxonomy in a collection database.
55. Gazetteer service. Can you link to an external authority?  
This would be similar to linking to a taxonomic authority. ALA may be able to help with this.
56. Can you specify attributes per specimen?  
Yes, you can specify event and preparation attributes per specimen.
57. If you turn on security settings in the wizard, can you turn them off later? Yes, unless you have entered data.
58. Can you use any character for user names?  
Yes, except for spaces.
59. Is the accession number the same as the catalogue number?  
No, accession information deals with collection, export and import permits and deeds of gift.
60. Can you rename the levels of storage in the storage tree?  
Yes, you can.
61. If the taxonomic tree levels are enforced, can the value be null?  
No.
62. Why is "life" the top level?  
It is just the root, because the tree has to start with something.

63. If you have a fish collection, can you have a fish tissue collection within that collection?  
No, you cannot have collections within collections. You would need to create a separate sub collection.
64. If you have a tree with multiple kingdoms, can these be linked?  
Yes, you can for example link hosts and parasites.
65. Is the record set virtual?  
Yes, it is a snap shot of the actual data.
66. Is it possible to duplicate data?  
Yes, it is possible to copy data into a new record for which the majority of the values are the same.
67. Can you search within documents which are attached to a record?  
No, you can only search the file names and titles.
68. If you upload an image to Specify, does this make the image available to the public?  
No, not until you submit the image to Morphbank.
69. When you put an image in Specify, does it display on a form?  
It displays as an icon or thumbnail.
70. Can you open a form and see all the data?  
Yes.
71. Can the automatic catalogue number assignment be turned off?  
Yes.
72. Can mandatory fields be turned off?  
Yes, you can specify which fields are mandatory and which are optional.
73. Can the data format be changed?  
Yes.
74. Can the collector order be on the specimen?  
Yes, you can, for example, be the first collector for collection A and the second collector for collection B.
75. Can you have start, end, and verbatim dates for collections?  
Yes.
76. Is it possible to set up a different form per specimen?  
No.
77. Can you mark a form with a quality indicator?  
Yes.
78. Can you have a creation date, modification date and creator field?  
Yes.

79. Can pick lists be limited?  
Yes, unless they are being used by data in the database.
80. Is the cataloguer the person who is logged in?  
It can be, but this can be changed in the settings.
81. How are determinations ordered?  
Determinations are ordered by who did what and when. An order field can be added to the determination form. In general, forms can be set up as simple or complex as needed.
82. Can different forms be set up for different user groups?  
Yes.
83. Can data be exported to CSV format, then edited and then re-imported?  
No.
84. How do you display usage notes?  
By double-clicking on the caption of a field.
85. Can you build your own forms?  
Yes, if you know XML.
86. Can you prevent a user from editing a taxonomic tree?  
Yes.
87. Can you add tables?  
You cannot add tables to the Specify data model, but you can add tables through MySQL.  
You do need to be careful though, to not set tables to global in the MySQL database.
88. How can you organise regions in a tree if they are overlapping?  
By using the locality form.
89. How can you un-synonymise?  
By using "undo synonym".
90. How can you handle name splits in Specify where some species stay under one name and other species go under the new name?  
You would have to do that manually.
91. Can you edit branch names of trees?  
Yes.
92. Can you use mathematical expressions in queries?  
Yes.
93. Can you create your own standards?  
Yes, you can use internal and external authorities.
94. Can edits be done straight in the back-end in MySQL?  
Yes.

95. Can you delete records?

Yes, as long as those records are not attached to other records.

96. When you import an Excel spreadsheet, does Specify perform a spell check?

No, there is no authentication yet, but it will be developed.

97. Would everyone have to have a local client of Specify on their computer?

Yes.