

Basic Training Manual

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The basics

Introduction to basic Scratchpad training course

The basic training course focuses on creating and setting up a new site, adding various kinds of data and generating taxon pages.

The goal is to give an overview of what a Scratchpad can do, and allow you to independently explore your Scratchpad after the event.

Training sites are provided for the courses we teach, but are also available upon request (see <http://scratchpads.eu/scratchpad-training-sites>) if you want to do the course on your own. If you participate in one of our courses, your trainer will provide your training site address.

The default log in details for training sites are:

Username:username

Password: password

- **Zoological Scratchpad Training files** can be downloaded from http://help.scratchpads.eu/w/File:Basic_Training_Files.zip. The basic training manual can be downloaded from http://help.scratchpads.eu/images/e/ed/Botanical_Training_Materials.zip.
- **Botanical Scratchpad/eMonocot Training** files can be download from http://help.scratchpads.eu/images/e/ed/Botanical_Training_Materials.zip

Browser: We strongly recommend using Mozilla **Firefox** browser which can be downloaded from <http://www.mozilla.com>. If you don't have administrative rights on your computer you can use Portable Firefox.

The aim of this course will be to create a taxonomic website for either Liliaceae or Phthiraptera.

If you follow the course online, use the 'Next' links to click through the tutorial.

Next: Log in

Log in

Aim: Log in for the first time and change your user account data.

You need: -

Time: 5 min

Instructions

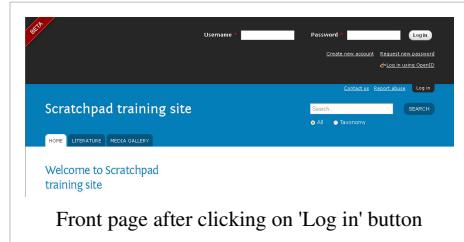
The log in for a training site differs a new Scratchpad that you have applied for yourself. Use either one or the other of the log in descriptions below.

Log in for a new training site

- Go to the URL of your training site.
- The Log in button is in the upper right corner. Log in to your site with your username and password. The username for all training sites is "username" and the password is "password".
- Accept the terms & conditions and save.
- Click on the "Hello username" link in the upper corner of the site to go to your user account.



Front page of training site



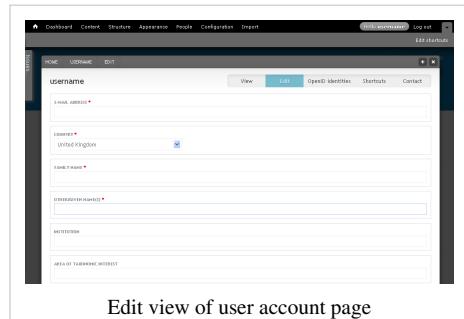
Front page after clicking on 'Log in' button

- Click on the 'Edit' tab to edit your account data. You don't need to change your password. Save

Log in for a new Scratchpad

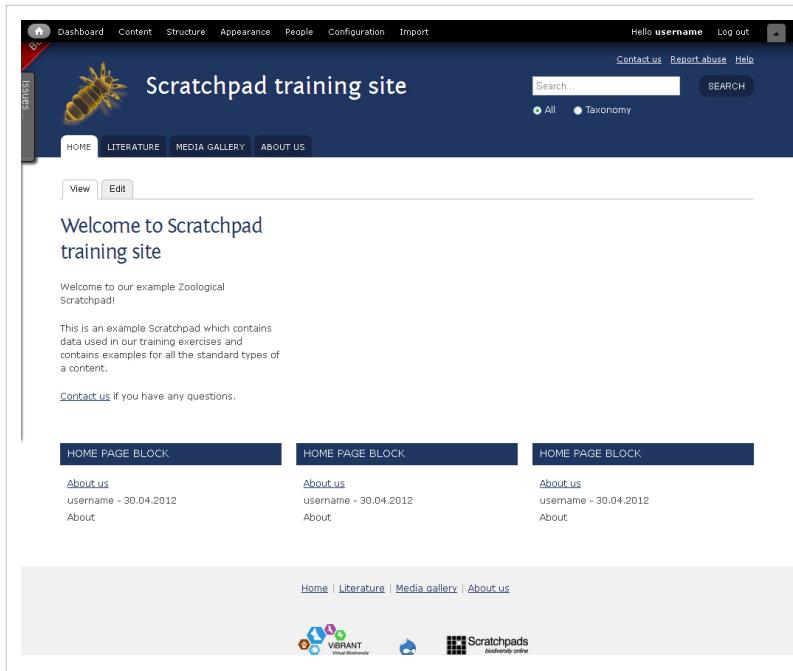
- A few minutes after signing up for a new Scratchpad you will receive an email with a one-time login. Clicking on this link will open a 'Reset password' page.
- Click on the 'Log in' button. Your user account page will open ready for editing.
- Enter your user data, add a new password, accept the terms & conditions and save.

Next: Set up the look of your site



Edit view of user account page

Set up the look of your site



Set up workflow

After saving the user account page for the first time, you automatically start a workflow that leads you step by step through the basic set up of your site.

- Click on the <Continue> button to start the set up process.
- The first step is writing a welcome message that will appear on the front page of your site. Images will appear separately on the front page, so don't add them to the welcome message.
- The next step is adding an 'About' page. Use the icons of the rich text editor to format your text or to add links or images.
- The third step is selecting a Creative Commons license. The default license is "Attribution CC BY" but you can select a different license if you want. See <http://creativecommons.org/licenses/> for an explanation of licenses.
- The last step is selecting which tools you need on your site.

Depending on the focus of your site you will need different tools, so for example only taxonomic sites will need EOL taxon pages or specimens. The less tools you choose the easier your site will be to use for people with little Scratchpad knowledge. So only choose those you really need. If you are participating in a training course, don't change any of the tools, just save. You can always activate more tools later by clicking on <Structure> in the Admin menu and selecting <Tools>.

- Click on the <Finish> button to complete the set up. You now have the option to add content, add a taxonomy or get more help.
- Go to the front page of your site by clicking on the home icon in the upper left corner.

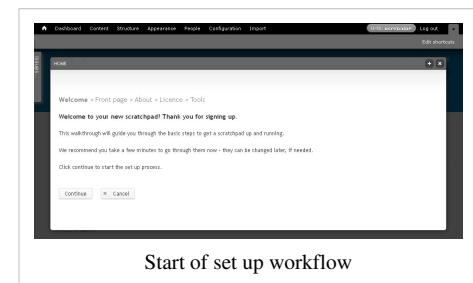
Aim: Write a welcome message and about us page, select the tools you need and choose a theme color for your site.

You need:

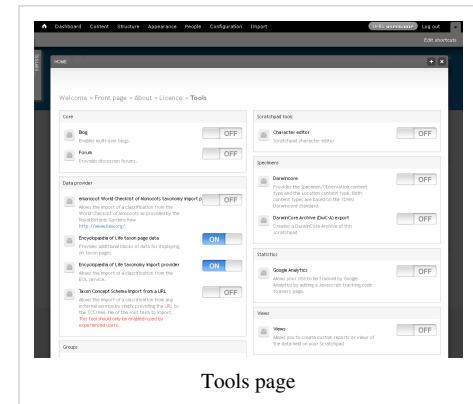
- To be logged in and have saved your user account (see Log in)
- Text for a welcome message
- Text for an 'About' page

Time: 10 min

Instructions



Start of set up workflow



Tools page

Change theme color

To differentiate the look of your site from other Scratchpads you can change the color of the theme.

- To change the theme color, click on the 'Colors' icon in the lower right corner of your Scratchpad, select one of the colors and click on <Save>.



Additional options

If you don't complete the set up workflow, you can complete it later by going to the <Dashboard> and clicking on the respective link.

Add a logo

- To add a logo (Download example logo), click on <Appearance> in the Admin menu and then on <Settings> for the enabled theme. At the bottom you can upload a logo. If you disable <Use the default Shortcut icon>, you can also upload a shortcut icon. Save.

Next: Admin menu



Bottom of theme settings page with section for logo upload

Admin menu



Aim: Get familiar with the different functions of the Admin menu.

You need: -

Time: 10 min

Instructions

The administration pages are accessed via the Admin menu at the top of the Scratchpad. Have a look at the various administration pages.

- The first of the admin links is the <Home> icon that will always bring you back to the front page of the site.
- The <Dashboard> gives administrators a customizable overview of important site information. You can add and remove items from the dashboard (see Customize dashboard), or you can disable the dashboard completely.
- Under <Content> you have access to the various content on your site and can add content.
- <Structure> has links to the various layout options like blocks and theme as well as the taxonomy, relations and also character projects.
- <Appearance> is where you can edit the theme that is the general layout of your site.
- Under <People> you can administer the site's users.
- <Configuration> gives access to various advanced administration pages that you will need only rarely or not at all.
- The <Import> page is the place to go when you want to import any kind of data into your Scratchpad.

Next: Add a page

Add a page

The screenshot shows a web application interface for managing content. At the top, there's a navigation bar with links like 'Dashboard', 'Content', 'Structure', 'Appearance', 'People', 'Configuration', and 'Import'. A user 'Hello username' is logged in, and there are 'Log out' and 'Contact us' links. Below the navigation is a search bar with dropdown options for 'All', 'Taxonomy', and 'Page'. The main content area has a header 'Scratchpad training site' with a logo of a bee. Below the header is a breadcrumb trail: 'Home > Introduction'. A green success message box says 'Page Introduction has been created.' The page title is 'Introduction'. Underneath the title are three buttons: 'View', 'Edit', and 'Clone'. The page body contains the text 'Lice are insects of the order Phthiraptera.'. At the bottom of the page, there's a footer with links: 'Home | Introduction | Literature | Media gallery | About us'.

Aim: Add a page and place it in a menu.

You need:

- Text for the page
- Images

Time: 10 min

Instructions

- Click <Content> in the Admin menu and then on the <Add> link for Page.

The screenshot shows the 'Content' administration page. It lists several content types: 'Bibli', 'Media gallery', 'Page', 'Topic description', 'Comments', and 'File type'. Each item has columns for 'Published' and 'Unpublished' status, and buttons for 'View', 'Add', 'Import', and 'Grid'.

Content administration page

- Enter a TITLE, e.g. "Introduction", and some BODY text. The SUMMARY field can be used for a short version that is displayed on search results or news pages.
- Above the BODY field is the MEDIA field where you can link media (images, audio or video) to your page. These items will appear as links beneath the text of your page. If you want to add images to your text, you need to add them using the <Add media> icon in the BODY field.
- In MENU SETTINGS select where you want the page to be placed by choosing the appropriate PARENT ITEM. By default, a page will be set to <Main menu> (see below).

The screenshot shows the 'Create a new page' dialog. It has fields for 'Title' (set to 'Introduction') and 'Body' (containing the text 'Lice are insects of the order Phthiraptera.'), which is also previewed in the rich text editor above. Below the body is a 'Text format summary' section. At the bottom, there are 'Save' and 'Cancel' buttons, and a note: 'Create a new page'.

- Click the <Save> button at the bottom left. You have just created your first page!

Additional options

Edit page

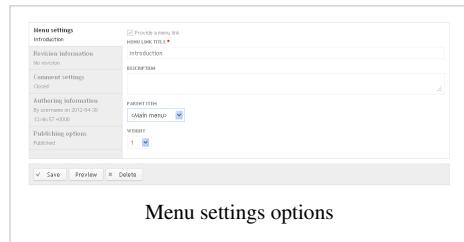
- Edit content on the page by clicking the <Edit> tab. The BODY field has a Rich text editor. Explore some of the features of the rich text editor by modifying the format of the text you have entered. Save.



Basic Scratchpad page

Menu settings when editing a page

- A MENU LINK TITLE is required for each page. By default, the page title is used. You may want to replace the menu link if the page title is very long.
- The PARENT ITEM controls where your page will be placed on the site. Main menu is selected by default. It is not advisable to have all pages showing up in the Main menu, so before you add pages think about the hierarchy of menu items and start adding the pages that should show in the main menu first.
- The WEIGHT defines where in a list of menu items this item is placed.



Menu settings options

Clone page

For cases where there are only slight differences between nodes you can create a duplicate:

- Click on the <Clone> tab. Change the title of the page and some of the text. Now switch the parent menu item from "Main menu" to the new menu item you created with your previous page. Save.

Instead of popping up in the Main menu, the menu link title now appears in a block next to the page. This block will fill with a hierarchy of menu items as you add more pages. You can use it to structure your pages in a way that helps users to find the information.

Next: Add a biological classification

Add and handle Taxonomies

Add a biological classification

The screenshot shows the 'Taxonomy' administration page. At the top, there are tabs for HOME, ADMINISTRATION, STRUCTURE, and TAXONOMY. Below the tabs, a button '+ Add vocabulary' is visible. A message 'Created new vocabulary Lice.' is displayed. The main area lists four vocabularies:

Vocabulary name	Operations
Image keywords	settings edit terms add terms
Imaging technique	settings edit terms add terms
Lice	settings edit terms add terms
Preparation technique	settings edit terms add terms

A 'Save' button is at the bottom.

module contains controlled vocabularies. A vocabulary is a list of terms. These do not have to be biological classifications. Country lists, keywords etc. can all be treated as "taxonomies" in the context of your site. Taxonomies are the backbone of a Scratchpad and link together the content. They are used to generate taxon pages. Before you add a set of taxonomic names to your Scratchpad you need to add the vocabulary for it.

- Click on <Structure> in the Admin menu and click on <Taxonomy> near the bottom.

Aim: Add a biological classification by first creating a vocabulary.

You need: -

Time: 5 min

Instructions

Before adding data other than static pages to a Scratchpad, we need to add the taxonomic names. This is done via the taxonomy module. The taxonomy

The screenshot shows the 'Structure' administration page. At the top, there are tabs for HOME, ADMINISTRATION, STRUCTURE, and TAXONOMY. Below the tabs, a 'Structure' icon is visible. The main area lists several options:

- Blocks: Configure what block content appears in your other sections and other regions.
- Contact form: Create a custom contact form and set up categories for the form to use.
- Content types: Manage content types, including default status, front page priorities, content settings, etc.
- Taxonomy: Manage tagging, categorization, and hierarchical structure of your content.
- Tools: Manage tools.

A caption below the screenshot reads 'Structure administration page'.

- Click on the <Add vocabulary> link.

The screenshot shows the 'Taxonomy' administration page. At the top, there are tabs for HOME, ADMINISTRATION, STRUCTURE, TAXONOMY, and ADD VOCABULARY. Below the tabs, a 'Taxonomy' icon is visible. The main area lists three vocabularies:

Vocabulary name	Operations
Image keywords	settings edit terms add terms
Imaging technique	settings edit terms add terms
Lice	settings edit terms add terms

A 'Save' button is at the bottom.

- Minimally enter the vocabulary NAME (e.g. "Lice" if you use our training materials); you can also add a DESCRIPTION. Select which kind of biological classification you are creating ("Animal" in our example)
- Click <Save>.

The screenshot shows the 'Add a vocabulary' form. At the top, there are tabs for HOME, ADMINISTRATION, STRUCTURE, TAXONOMY, and ADD VOCABULARY. Below the tabs, a 'Taxonomy' icon is visible. The form fields include:

- Name:** Lice (highlighted in red)
- Modify name:** lice (edit)
- Description:** Lice classification
- BIOLOGICAL CLASSIFICATION:** Animal (selected)
- Save** button

A caption below the screenshot reads 'Add a vocabulary'.

Having created a vocabulary you now need to add the list of terms (names). This can be done by either importing a classification through the external Encyclopedia of Life service (see Import a classification from EOL) or by creating and importing your own classification (see Import your own classification). Alternatively you can add terms one by one by clicking on <Add terms> when you are on the <Taxonomy> admin page or by using the taxonomic editor (<Edit terms>) (see Edit a biological classification).

Additional options

Once you have added terms to your classification, new content (exception: biblio nodes) will be automatically tagged to the classification by default. This is called autotagging. For instructions on how to change or remove the autotagging function, see the Autotagging help page.

Next: Import a classification from EOL or Import your own classification

Import a classification from EOL

Aim: Import a classification through the Encyclopedia of Life service.

You need:

- A vocabulary (See Add a biological classification on how to add a vocabulary)

Time: 10 min

Instructions

Import from EOL

- Click on <Import> in the Admin menu.
- Select the "TCS (Encyclopaedia of Life taxonomy import provider)" import.
- Next select a vocabulary.

Import administration page

- Click on <EOL>, enter the root term of your classification (e.g. "Pediculus") in the text field and click on <Search EOL>.
- The name usually appears in several possible classifications. Choose one of them and click the <Import from EOL> button.

Import administration page: EOL Import

This will import the complete classification of the taxon you type, into the Scratchpad. We recommend that you restrict your choice to groups that contain only a few taxa for the exercise. When the import is complete, a link will appear in the Main menu of your site linking to the taxon pages and the taxonomic editor will open. You can learn more about how to use the taxonomic editor on the Edit a biological classification page.

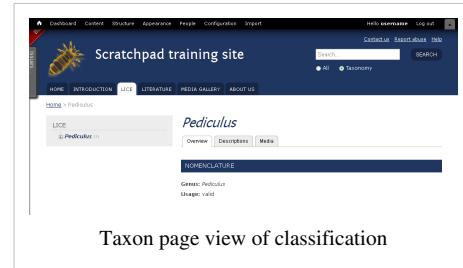


Taxonomic editor

View classification

- To view your classification and the taxon pages close the overlay by clicking on the cross in the upper right corner and go to the new tab with the classification's name in the Main menu.
- On the left side of the page you can browse the classification. Navigate by clicking on the plus icons to view child taxa and by clicking on a taxon name to open the respective taxon page.

You can learn more about taxon pages on the Find and optimize taxon pages help page.



Taxon page view of classification

Note

If you use a classification imported from EOL for your Scratchpad, you should acknowledge the source database. To find out the source can be tricky because a lot of data are aggregated by Species 2000. If you chose a Species 2000 classification, click on the link to Species 2000 and search again for your taxon. The source database is shown for each taxon.

Next: Import your own classification or Edit a biological classification

Import your own classification

The screenshot shows the Scratchpad training site interface. At the top, there's a navigation bar with links for Dashboard, Content, Structure, Appearance, People, Configuration, Import, Contact us, Report abuse, and Help. A search bar is also present. The main content area shows a detailed taxon page for *Pediculus humanus*. On the left, a tree view shows the taxonomic rank LICE2 with various families like Phthiraptera, Amblylura, Anoplura, and Pediculidae, with *Pediculus* as a child of Pediculidae. The right side shows the taxon details for *Pediculus humanus*, including its family (Pediculidae), genus (*Pediculus*), species (*Pediculus humanus*), common names (body louse, head louse), and usage (valid). Below the main content are tabs for Overview, Descriptions, and Media.

Aim: Import your own classification.

You need:

- A vocabulary (See Add a biological classification on how to add a vocabulary)
- An Excel file with a classification in ITIS format. (Download Taxonomy import example file or see Create a biological classification template file).

Time: 10 min

Instructions

Import classification from Excel file

- Click on <Import> in the Admin menu and select an import. If you are using our training materials choose "Taxonomy: Excel file import".
- Select a vocabulary (if you did the EOL import, you need to create a second, empty vocabulary), upload a file with your classification (either your own or "TEMPLATE-import into phthiraptera taxonomy.xls") and click the <Import> button.

The screenshot shows the Scratchpad administration interface under the IMPORT tab. It has sections for 'Import' and 'Import'. The 'Import' section contains a dropdown for 'Vocabulary' set to 'Lice2' and a file input field labeled 'Browse...' with the placeholder 'Select a file from your local system.' Below the file input is an 'Import' button. A tooltip provides detailed information about the required columns in the ITIS format file, including 'Line 1: Name, Line 2: Parent term, Line 3: Associated acronym, Line 4: Author, Line 5: Date, Line 6: Reference, Line 7: Validity Person, Unit indicator, Unit indicator 2, Unit indicator 3, Unit indicator 4, Unit indicator 1, Unit indicator 2, Unit indicator 3, Unit indicator 4, Usage, Vernacular name'.

Import administration page: Taxonomy file import

When the import is complete, a link will appear in the Main menu of your site linking to the taxon pages and the taxonomic editor will open. You can learn more about how to use the taxonomic editor on the Edit a biological classification page.

The screenshot shows the Scratchpad taxonomic editor for the Lice2 vocabulary. It displays a tree view of the Phthiraptera class. A tooltip provides instructions for dragging and dropping taxa: 'Dragging a term will move the term to the taxonomy editor on the left, setting it as the parent term. Terms can be moved by clicking and dragging. Once the mouse is over a term, you can hold over the button, and then move it to where you want the term to go. When moving a term, if you drag the term being moved over another term, then that term will become a child of the term being moved. If you drag the mouse to the right, which over a term, then term will become a child of the other term. If you drag the mouse over a term, then term will become a sibling of the other term. Clicking on a term will move this term and all its progeny in yellow. Clicking on a term will move this term and all its progeny in yellow.'

Taxonomic editor

View classification

- To view your classification and the taxon pages close the overlay and go to the new tab with the classification's name in the Main menu.
- On the left side of the page you can browse the classification. Navigate by clicking on the plus icons to view child taxa and clicking on a taxon name to open the respective taxon page.

You can learn more about taxon pages on the Find and optimize taxon pages help page.

The screenshot shows the Scratchpad training site interface. At the top, there's a navigation bar with links for Dashboard, Content, Structure, Appearance, People, Configuration, Import, Contact us, Report abuse, and Help. A search bar is also present. The main content area shows a taxon page for Phthiraptera. On the left, a tree view shows the taxonomic rank LICE2 with Phthiraptera as the parent term. The right side shows the taxon details for Phthiraptera, including its common name (Phthiraptera), status (singular focus), and usage (valid). Below the main content are tabs for Overview, Descriptions, and Media.

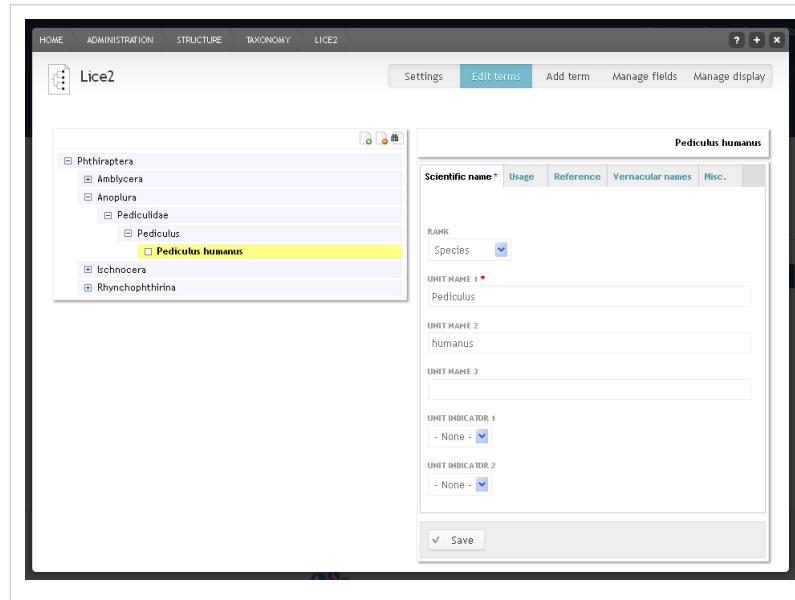
Taxon page view of classification

Delete classification

If you have added two classifications that contain at least partly the same terms during the training, you should delete one of them (the EOL one if you use our training materials) before you continue, to avoid confusion. To do this go to <Structure> in the Admin menu and click on <Taxonomy> near the bottom. Select 'Settings' for the classification you want to delete. Then click on the 'Delete' button at the bottom. This will delete the vocabulary as well as all the terms in this vocabulary.

Next: Edit a biological classification

Edit a biological classification



Aim: Add, edit, move and delete taxonomic names in a biological classification.

You need:

- A biological classification on your Scratchpad

Time: 10 min

Instructions

- Go to the tab with the classification's name in the Main menu.
- On the left side of the page you can browse the classification. Navigate by clicking on the plus icons to view child taxa and clicking on a taxon name to open the respective taxon page.

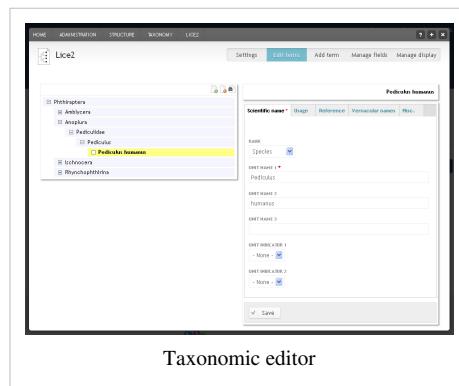
The screenshot shows the Scratchpad training site. At the top, there's a header with links for HOME, INTRODUCTION, LICE, LICE2, LITERATURE, MEDIA GALLERY, and ABOUT US. The main content area shows the taxon page for 'Pediculus humanus' (Linnaeus, 1758). The page includes a sidebar with a tree view of the classification structure: Phthiraptera, Amblycera, Anoplura, Pediculidae, Pediculus, and Pediculus humanus. The main panel displays the taxon details for 'Pediculus humanus', including its common names ('body louse, head louse') and usage ('Head'). There are tabs for 'Edit', 'Delete', and 'View' at the top of the main panel. A note at the bottom right says 'TIP: Click on the edit icon to edit this page'.

- In the upper right side of the page, click on the cog wheel icon next to the taxonomic name header of a taxon page and click on <Edit>. You are now viewing the taxonomic editor.

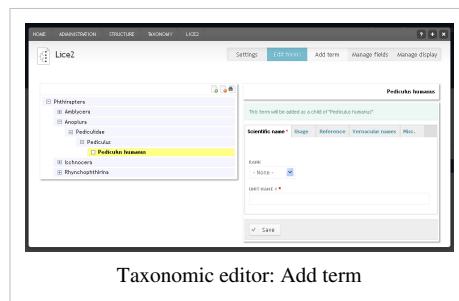
The taxonomic editor is divided into a left Tree side and right Form side. On the Tree side you can add, edit, move, delete or search for taxonomy terms. On the Form side you add/edit the data associated with a term.

- When accessing the taxonomic editor via the classification edit function, the respective term is already in edit mode. If you instead access the editor via the taxonomy administration page or if you want to edit a different term, extend the classification to the correct term by clicking on the plus icons and select a term by clicking on the 'Edit' link next to it. Edit the term on the Form side and save.
- Add a term by either clicking on the Add term icon in the upper right corner of the Tree side or on the <Add term> tab above the Form side. The new term will be added as child of the selected term. If no term was selected the new term is added to the root of the classification.
- Delete a term by clicking on the Delete term icon in the upper right corner of the Tree side of the taxonomic editor.
- Explore the other functions of the taxonomic editor.

You can learn more about taxon pages on the Find and optimize taxon pages help page.



Taxonomic editor



Taxonomic editor: Add term

Additional options

Add fields

If you need additional fields, for example one for type data, click on the 'Manage fields' tab. Near the bottom of the table is an option to 'Add new field'. The field type is usually "Text". After saving, more options for the field are available. You can also add a new group and move your new fields into this group. Groups show up as tabs in the taxonomic editor.

Next: Add literature

Find and optimize taxon pages

taxonomic name in the classification is accessible via the respective taxon page.

- To access the taxon pages click on the name of your biological classification in the Main menu.
- On the left side of the page you can browse the classification. Navigate by clicking on the plus icons to view child taxa and clicking on a taxon name to open the respective taxon page.

Aim: Find and view the information that is linked to the names in your biological classification.

You need:

- A biological classification
- Example data linked to the same taxonomic name, e.g. images, literature and taxon descriptions.

Time: 10 min

Introduction

All the information that is linked to a

Taxon page view of classification

- Browse to a taxonomic name that has many data linked to it, e.g. the "Pediculus humanus" species page if you use our training materials.

Information is displayed in a series of blocks that are accessible via different tabs. The <Overview> tab gives an overview of the data available on the site whereas the other tabs show all the data available for the respective content type on the Scratchpad site as well as external data from EOL if this function is enabled on the Tools administration page.

Taxon page: Overview tab

Taxon page: Media tab

Additional options

Search for taxonomic name

- An alternative method for finding taxon pages is to check <Taxonomy> below the search box, start typing a taxonomic name, select one of the options and click on the <Search> button. This will find all the content linked to this name. Open one of the nodes by clicking on the title and then click on the link to the taxonomic name at the bottom. This will open the taxon page for this term.



Taxon page: Description tab

Edit nomenclatural data or toggle placeholder blocks

When you hover with the mouse over a taxon page you will see cogwheel icons in several places.

- Clicking on the cogwheel next to the taxonomic name gives you two options:
 - <Edit> will open the taxonomic editor so that you can edit the nomenclatural and taxonomic data for this taxon (see Edit a biological classification).
 - <Toggle placeholder blocks> will make blocks visible that don't contain any data. Usually any blocks that don't contain data are hidden from view.

Edit blocks

- Clicking on the cogwheel in the coloured bar of a block title will allow you do configure the block, for example to show it only to specific user roles.

Additional information

EOL data shown on taxon pages are currently (June 2012) restricted to text, images, videos and GBIF data.

Next: Edit the front page

Add Content

Add literature

The screenshot shows the Scratchpad training site's Literature page. The main content area displays a table of publications about head lice. The columns are Authors, Year, and Title. The first few entries are:

- deBoer, R. (1984). Efficacy of malathion and synergised bisabolene in the treatment of head louse *Pediculus humanus spp. capitis infestations*.
- (1975). *Pediculus humanus capitis*.
- (1973). Kopflausbefall (*Pediculosis capitis*). Verhütung und Bekämpfung. Ratschläge an Ärzte.
- Al-Affas, NH. (1993). The incidence of the head louse (*Pediculus humanus capitis*) among pupils of two schools in Basrah city.
- Allen, JM, Reed, DL, Perotti, AM, Braig, HR. (2007). Evolutionary Relationships of "Candidatus Riesia spp." Endosymbiotic Enterobacteriaceae Living within Hematophagous Primate Lice.
- Amenigbe, MD, Ferrer, A, Champigne, S, Monteny, N, Deurff, J, Richard-Lenoble, D. (2000). Isoenzymes of human lice: *Pediculus humanus* and *P. capitis*.
- Ardalan, A. (1976). Preliminary survey on susceptibility of "Pediculus humanus corporis" to insecticides in Teheran, Iran.
- Arkwright, JA, Bacot, AW. (1921). A bacillary infection of the copulatory apparatus of *Pediculus humanus*.

On the left sidebar, there are filters for 'Import', 'FILTER BY AUTHOR:', 'TAXONOMIC NAME', 'TERMS', 'FILTER BY CONTENT TYPE:', 'BIBLIO: TYPE', 'BIBLIO: KEYWORD', and 'Troester (149)', 'Pediculus (130)', 'Pediculus humanus (88)'. The top navigation bar includes links for Dashboard, Content, Structure, Appearance, People, Configuration, Import, Hello username, Log out, Contact us, Report abuse, and Help.

Aim: Create bibliographic references that are linked to the classification.

You need:

- A file with a bibliography in Endnote-xml or bibtex format.
- A biological classification

Time: 10 min

Instructions

Import a bibliography

- Click <Import> in the Admin menu and select "Nodes: Biblio file import".
- Browse for the file (download the Biblio example file) and select the FILE TYPE. If you are using our training materials select "Endnote XML" because our bibliography has been exported from Endnote into XML format.
- Import.
- Click on the <x> icon in the upper right corner to close the import overlay.

The screenshot shows the Scratchpad administration page for importing bibliographies. The 'Import' section is active. It shows a file selection dialog with the path 'E:\Documents and Settings\My Documents\Scratchpad\Train\Biblio.xml'. The 'FILE TYPE' dropdown is set to 'Endnote XML'. The 'SEARCH INDEX' checkbox is checked. Below these are 'SEARCH INDEX OR IGNORE' and 'username (scratchpadAdmin.ac.uk)' fields, along with 'Temporary Settings' and 'Import' buttons.

Import administration page: Biblio import

The screenshot shows the Scratchpad administration page after a successful import. The message 'The following elements were ignored because they do not map to any biblio fields: count=492' is displayed. Below it, 'The file Biblio-Endnote.xml was successfully uploaded. 372 of 372 nodes imported.' is shown. There is a 'Import' button at the bottom.

Import administration page: Messages about the success of the import

- Click on <Literature> in the Main menu and you should see all your imported records. To the left of the literature citations is the faceted browsing that allows you to filter for certain terms.

Literature

Authors	Year	Title
deboer, R	1994	Efficacy of malathion and synergised bioallethrin in the treatment of head louse Pediculus humanus capitis infestations
	1975	<i>Pediculus humanus capitis</i>
	1977	Efficacy of Pediculus capitis, Verhulst and De Smedt, Rethelius an Arde
Alaffit, FM	1993	The incidence of the head louse Pediculus humanus capitis in Belgian schools among pupils of three schools in Belgium
	2007	Epidemiological relationships of "Candidatus <i>Phylloxeroides verbenae</i> " with <i>Verbenae</i> Lutz et al. 1938
Allen, M, Head, DL, Persch, AR, Pring, HS	2007	Entomopathogenic fungi within <i>Verbenae</i> Lutz et al. 1938
Anderson (1)	2010	Evaluation of human lice Pediculus humanus and P. capitis
Anderson, MD, Pierini, A, Chappelle, S, Montero, N, Dewitt, J, Richard-Lenoble, D	2010	Evaluation of human lice Pediculus humanus and P. capitis
Arakane, A	1976	Preliminary survey on susceptibility of "Pediculus humanus capitis" to insecticides
deKwiatkowska, MA, Brzozek, AW	1991	A baseline situation of the voluntary immunization of children in preschool

Literature page

Edit a reference

- Click on the title of any biblio entry to go to the node page for that entry. Click on the 'Edit' tab.

BIBLIO

Efficacy of malathion and synergised bioallethrin in the treatment of head louse *Pediculus humanus* spp. *capitis* infestations

Publication Type:	Journal Article
Year of Publication:	1994
Author(s):	deboer, R
Journal:	Acta Leidensia
Volume:	52
Page(s):	53 - 60
Date Published:	1994
Keywords:	control, malathion, pediculosis

Biblio node

- You can now edit this individual entry, changing any of the fields that you consider to need changing.
- Tag this biblio node to the classification by adding the respective term in the TAXONOMIC NAME field (Autotagging doesn't work for biblio nodes). Only references that are linked to the classification will show up on your taxon pages. If you are using our training material, link the record you are editing to "Pediculus humanus".
- Press the 'Save' button.

Edit view of biblio node

Authors	Name	Category	Role
deboer, R	Primary	Author	
	Primary	Author	
	Primary	Author	
	Primary	Author	

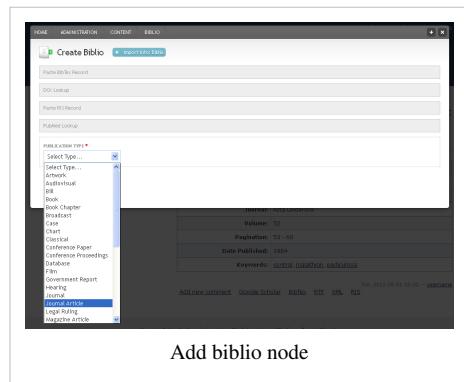
File attachments:

ATTACH FILE

Add a reference

- Click <Content> in the Admin menu and then on the <Add> link for Biblio.
- Select the publication type 'Journal Article' (or any type you prefer), and fill out the fields given. Remember to link this bibliographic reference to your classification by filling in the TAXONOMIC NAME field.
- You can also add a bibliographic record by pasting the BibTex or RIS record or looking it up.

Next: Add a media gallery



Add biblio node

Add and export taxon descriptions

The screenshot shows a taxon description for *Pediculus humanus*. At the top, there's a navigation bar with links to HOME, INTRODUCTION, LICE, LICE2, LITERATURE, MEDIA GALLERY, and ABOUT US. Below the navigation, a breadcrumb trail shows 'Home > Pediculus humanus'. A green success message box says 'Taxon Description *Pediculus humanus* has been updated.' Below the message are three buttons: 'View', 'Edit', and 'Clone'. The main content area features a world map with a green shaded region indicating the distribution of *Pediculus humanus*. The map includes labels for continents and countries. At the bottom left, there's a 'General description' box containing the following text: 'Pediculus humanus, is a louse which infests humans. The condition of being infested with head lice, body lice, or pubic lice is known as pediculosis. Head with distinctive dark eyes. Abdomen elongate and lacking distinct tufted hairs. The head louse variant is typically 20% smaller than the body louse form.'

Scratchpad, taxon descriptions are used as part of the publication module to publish Scratchpad data in a journal. The publication module is still a prototype, but if you ever intend to use it, it would be wise to make use of the taxon description content type for your descriptions.

Aim: Add a taxon description that includes a distribution map and link it to the classification.

You need:

- A taxon description that uses SPM fields
- A biological classification

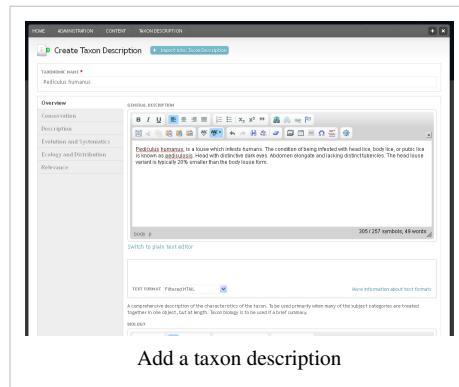
Time: 10 min

Instructions

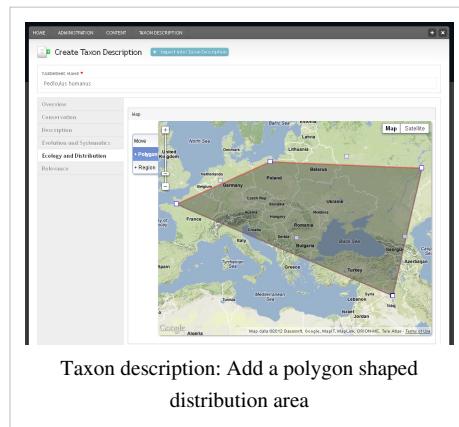
The Taxon description content type is based on TDWG's SPM (Specimen Profile Model) standard. Data in this content type can be harvested by EOL if the Scratchpad maintainer signs an agreement with EOL. Within a

Add a taxon description with distribution map

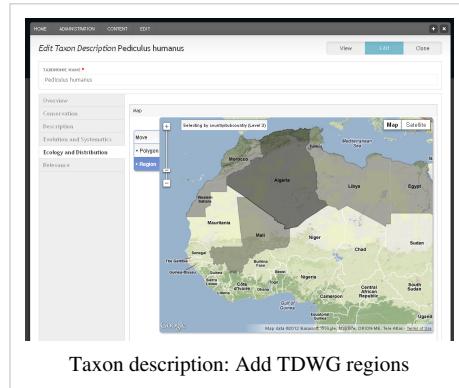
- Click <Content> in the Main menu and then on the <Add> link for Taxon description.
- Add the taxon name into the TAXONOMIC NAME field.
- Enter text into the fields as needed. We recommend to use the MORPHOLOGY field for the actual morphological description of the taxon and DIAGNOSTIC DESCRIPTION for the diagnosis.
- To add a distribution map click on the <Ecology and Distribution> tab.



- Click on the <+ Polygon> tab to enter a custom shaped distribution. You can move the map by dragging and dropping. Click the map to add polygon points. Right click to stop adding points. To edit an existing point click on it and drag it to a new position or right click to delete.



- Click on the <+ Region> tab to select TDWG regions. Select the level of the region either by zooming in or out of the map or by clicking on the <Selecting by ... (Level ...)> field. Then click on the map to select the respective region of this level.



- Save.

Export taxon descriptions to EOL (not yet working, 1 May)

You can export taxon descriptions, as well as images and literature attached to the respective taxon, to the Encyclopedia of Life. To export data from your Scratchpad, you need to sign up as a content partner with EOL at <http://www.eol.org/content/partners>. We will not do this as part of the training. Further instructions will be added when the export works.

Next: Find and view taxon pages



Add a media gallery

The screenshot shows the 'Mammal hosts' media gallery page. The sidebar on the left contains filters for IMAGE KEYWORDS (adult (2), habitus (2)), PREPARATION TECHNIQUE (There are no facets available to filter on.), FILTER BY AUTHOR (username (4)), IMAGING TECHNIQUE (Illustration (1), Light Micrograph (1), Photograph (1)), MEDIA TYPE (image (4)), TERMS (adult (3), habitus (2), illustration (1), Light Micrograph (1), Photograph (1)), and GALLERY (Mammal hosts). The main content area shows four illustrations of lice.

Aim: Add a media gallery and add a few images to this gallery.

You need:

- Images

Time: 10 min

Instructions

- Click <Content> in the Admin menu and then on the <Add> link for media galleries.

The screenshot shows the 'Content' administration page. Under the 'Type' section, 'Media gallery' is selected. Other options include 'File' (application (multipurpose)) and 'Taxon description'.

Import administration page: Content administration page

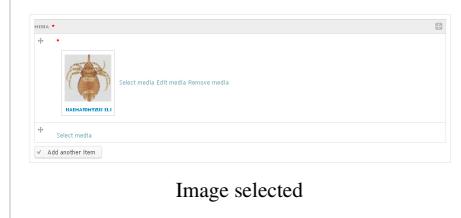
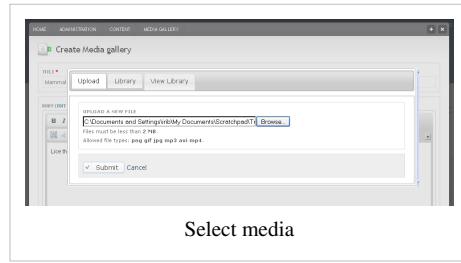
- Enter a TITLE and a short description of the gallery in the BODY field.

The screenshot shows the 'Create Media gallery' form. The 'Title' field is filled with 'Mammal hosts'. The 'Body' field contains the text 'Use that a parasitic on mammals.' Below the body, there is a rich text editor toolbar and a 'Select media' button.

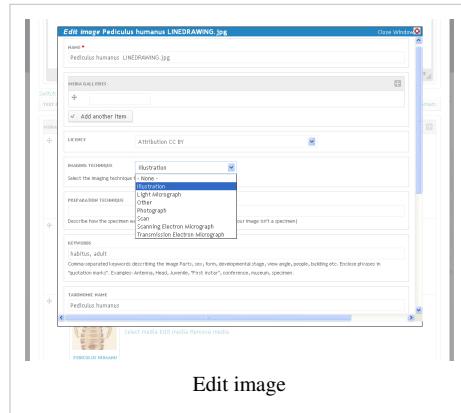
Add media gallery

- In the Media box click on <Select media> and either upload a new image or, if you already uploaded images, click on the <Library> tab and select the image you want to link to this media gallery.

Click on <Submit>.

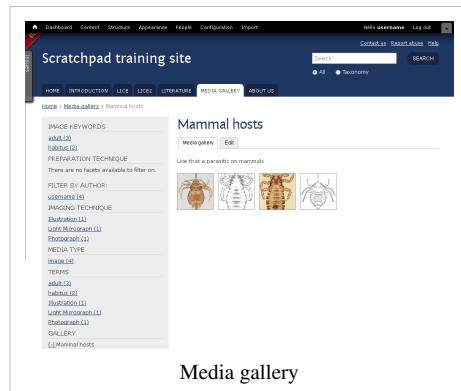


- If you want to change the creative commons license (the default licence is the one you chose during the set up workflow) or annotate your image in other ways (taxonomic name, imaging technique, keywords, etc.) click on <Edit media> next to the respective image. If you upload several images, it is faster to use the Grid editor to edit several images at once (see Edit content).
- If you want to add another image click the <Add another item> button and select another media file.
- Save.

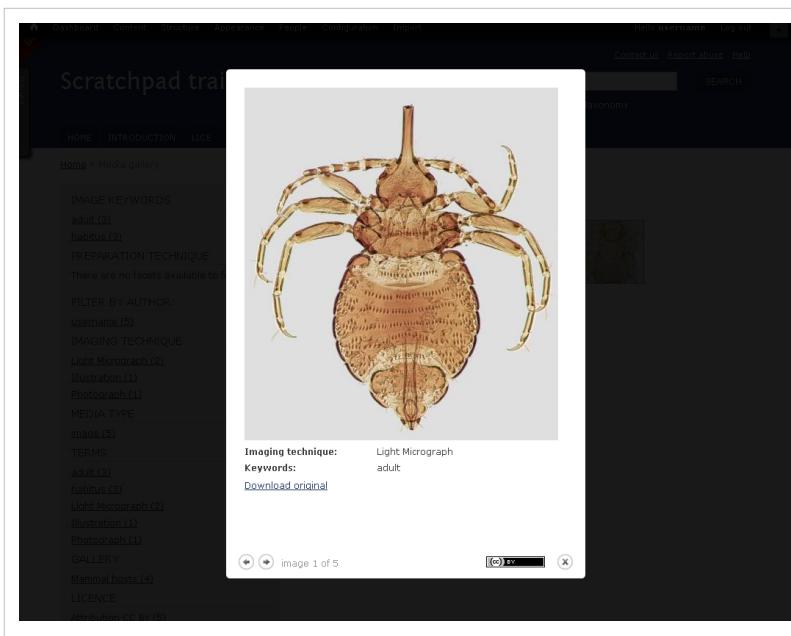


- After saving you will see your media gallery but the images will still be missing. Renew your browser page (Control+F5 on a PC) after a couple minutes to make the images appear.

Next: Add images and other media files



Add images and other media files



Aim: Add several images and link them to the classification.

You need:

- Images (png gif jpg jpeg)
- A biological classification

Time: 10 min

Instructions

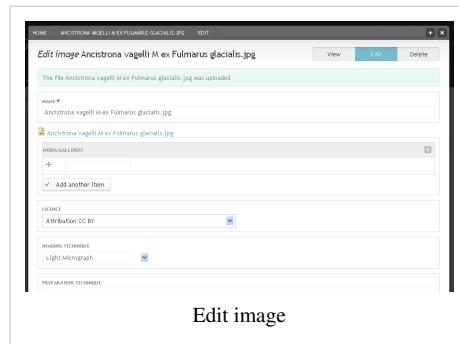
- Click <Content> in the Admin menu and then on the <Add> link for Images in the 'Files' section at the bottom.

Import administration page: Content administration page

- Click on <Add files> to select one or more files to be uploaded. You may also drag and drop files in the filename box from your file explorer (e.g. windows explorer).
- After selecting your file(s) click <Start upload> button and wait for the files to upload.

Upload image file

- Click on <Submit>.
- Change the TITLE if necessary and fill in the other fields as needed.
- To link the image to the classification and have it show on taxon pages enter a name in the TAXONOMIC NAME field. After typing a few letters you will get a list of names starting with these letters. Choose one of these.
- Save.
- Close the admin overlay and click on the <Media gallery> link in the Main menu if the gallery is not open yet. You will see your image in the gallery you selected or if you did not select a specific gallery it will be in the main media gallery.
- Click on the thumbnail to open a sort of slide show in which you can move from one image to the next.



Additional options

- Add a media gallery

Next: Add and export taxon descriptions

Import

Aim: Import data into your Scratchpad using a template file.

You need:

- Some data to import. Examples include: biological classifications (taxonomy), taxon descriptions, specimen/observation records, locations or most other kinds of data (include custom content types).
- Note:** Literature importation is handled in a slightly different way.

Time: 10 min

Instructions

To import data into your Scratchpad they need to be in the correct format matching the fields, and in some cases the values within these fields. To help prepare your data in the correct format you can export a template Excel file that includes all the fields and any pre-defined field values for the respective content type. Populate this file with your data and import into the Scratchpad.

Create template file

- Click on <Content> in the Admin menu and click on <Import> next to the content type you want to create the template file for, e.g. Taxon description.
- Click on the <Download> link and open the file in Excel. You will see the different Scratchpad fields as column headers. Fields with defined values are marked with a red header. Field entry is restricted to these values.
- Click into the cell below "Taxonomic name". A list of all the names in your biological classification will appear. Select the correct name.
- Fill the template file with your data and save.

Import template for taxon descriptions

Import template file

- Click on <Content> in the Admin menu and click on <Import> next to the content type into which you want to import data, e.g. Taxon description. You can also use our Example file to import taxon descriptions.
- Browse for the file and click on the <Import> button.
- You can view your imported data by clicking on the respective tab for the content type in the Main menu or by clicking on <Content> in the Admin menu and then on <View> next to the respective content type.

Overview of taxon descriptions administration page

Additional Information

- Always download an up-to-date template file** - the Excel spreadsheets can be used for most content and are dynamically generated. This means that if you add fields you will need to use a new template.
- Be patient with importing data** - the Excel file needs to be uploaded, parsed, then saved in your Scratchpad. Upload speeds are usually much slower than download speeds, so depending on your internet connection this may take some time (especially for large files >1MB). Importing medium-sized (3000-6000 term) taxonomies with rich data can take 5-15 minutes.
- Keep the browser window open when running an import** - if you close the browser window the import will stop.
- If a taxonomy imports in the wrong order, try running the import again** - if you have defined parent child relationships and a child is imported before its parent, it will be placed at the root of a taxonomy. Running an import again will update the taxonomy and the hierarchical relationship should now be correct.
- Use GUIDs if you have any** - A GUID is a global unique identifier for a record/node. GUIDs can be used to compare/synchronize different databases. Adding a GUID is not required, you only need it if your records/nodes were generated from an established database and you want to be able to update your data from this database at a later stage. Note that the GUID really has to be globally unique, at least across the whole Scratchpad. So it is not enough just add a number. Better is a combination like "Species2000-1".

Next: Edit content

Find and change Content

Find content



Aim: Learn about the different ways to find data on your Scratchpad.

You need:

- Content that you can find.

Time: 10 min

Instructions

There are several ways to find specific content on a Scratchpad:
Search, Main menu and Admin menu



Search

The Search box in the header has different search options: <All> and <Taxonomy>. <All> finds all content that includes the search term. <Taxonomy> only searches for terms in one of the vocabularies and returns the matched terms. When you are viewing a page ("Page" content type) you will get an additional option to search only page content. Clicking on the <Search> button when the search field is empty will lead to a faceted search page.

Find content via the Main menu

Click on one of the content types in the Main menu to find the respective data. Several content types, like literature and media gallery offer faceted browsing for smarter and more powerful searching.

Results of simple search

Find content via the Admin menu

As maintainer of a site you can also find content via the Admin menu.

- Click on <Content> in the Admin menu and then on <View> next to the content type that included the data you need to find.

This way you can only find content by content type. The advantage is that you can find content that is not published which is otherwise difficult. Additionally, you can search by username or do operations like deleting or (un)publishing several nodes at once.

Find recent content via the dashboard

You can customize your dashboard to show recent content.

Next: Add a forum

Edit content

filename	Media gal...	Taxonomic n...	Licence	Imaging techniq...	Keywords
Haematomyzus elephantis ma...	Mammal ...	Haematomyz...	(cc) BY	Light Micrograph	adult
Pediculus humanus LINNDR...	Mammal ...	Pediculus hu...	(cc) BY	Illustration	habitus, adult
Pediculus humanus male ex H...	Mammal ...	Pediculus hu...	(cc) BY	Photograph	adult, habitus
Haematomyzus elephantis LIN...	Mammal ...	Haematomyz...	(cc) BY		
Ancistrobra vagellii M ex Fulma...	Anostriona v...		(cc) BY	Light Micrograph	habitus
22-22.jpg					
23-23.jpg					
24-24.jpg					
25-25.jpg					
26-26.jpg					
27-27.jpg					
28-28.jpg					
29-29.jpg					
30-30.jpg					

Aim: Edit several nodes at once using the grid editor.

You need:

- A content type with several nodes.

Time: 10 min

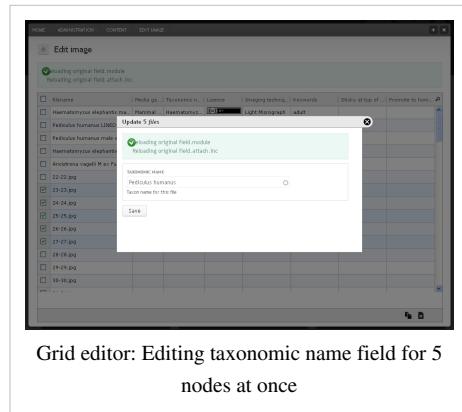
filename	Media gal...	Taxonomic n...	Licence	Imaging techniq...	Keywords
Haematomyzus elephantis ma...	Mammal ...	Haematomyz...	(cc) BY	Light Micrograph	adult
Pediculus humanus LINNDR...	Mammal ...	Pediculus hu...	(cc) BY	Illustration	habitus, adult
Pediculus humanus male ex H...	Mammal ...	Pediculus hu...	(cc) BY	Photograph	adult, habitus
Haematomyzus elephantis LIN...	Mammal ...	Haematomyz...	(cc) BY		
Ancistrobra vagellii M ex Fulma...	Anostriona v...		(cc) BY	Light Micrograph	habitus
22-22.jpg					
23-23.jpg					
24-24.jpg					
25-25.jpg					
26-26.jpg					
27-27.jpg					
28-28.jpg					
29-29.jpg					
30-30.jpg					

Grid editor with selection of columns (right click in header line) showing

more space for viewing a certain column the column sizes can be adapted by moving the column separators or by hiding columns by right clicking on the column header and deselecting columns.

- To edit a single cell click into the cell, edit and save.
- To edit the same field in several nodes, select the respective nodes by checking the box to the left of the row. Then click into the cell you want to edit for one of the nodes, edit and save. The content of this field will change for all selected nodes.
- To filter for certain content click on the little magnifying glass in the upper right corner of the matrix and enter the search word in the search box that appears for each column. You can sort the rows by clicking on the column header of the field you want to sort by.
- At the bottom of the matrix there are icons for cloning, deleting and undoing.

Next: Find content



Intermediate Tasks

Add locations and specimens

The screenshot shows a specimen observation form for BMNH - E - 123. The form includes fields for Basis of record (Preserved Specimen), Institution code (BMNH), Collection code (E), Catalogue number (123), Taxonomic name (Pediculus humanus), Type status (Notype), Date collected (Monday, April 25, 2011 to Tuesday, May 3, 2011), Media (empty), Count (5), Lifes stage (adult), and Sex (Female). Below the form is a map showing the location as Cromwell Road, London.

(the Taxonomic Databases working group) and GBIF. They are separated into two content types: location and specimen, which allows you to connect different specimens to the same location.

Add a location

- Click on <Content> in the Admin menu and then on the <Add> link for Location. Enter a LOCATION IDENTIFIER. The location identifier needs to be unique because it is used for referencing this location while adding specimens. Either click on the <Point> tab for the map to add a point to the map with a left mouse click (delete is with right click) or enter the latitude and longitude in decimals in the field below the map.

Aim: Add georeferenced specimen data and link the specimens to the classification.

You need:

- A biological classification
- Darwincore enabled. To enable the Darwincore module go to <Structure> in the Admin menu and click on <Tools>. In the 'Specimens' section enable Darwincore and save.

Time: 10 min

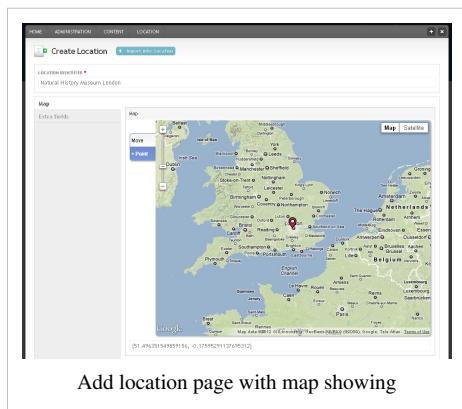
Instructions

Specimen data in a Scratchpad conform to the Darwin Core (version 1.2.1) format recommended by TDWG

The screenshot shows the Content administration page. The list of content types includes:

Type	Published	Unpublished	Action
Site	372	0	View Add Import
User blog	2	0	View Add Import
Forum topic	1	0	View Add Import
Article	0	0	View Add Import
Media gallery	1	0	View Add Import
Page	2	0	View Add Import
Specimen/Observation	0	0	View Add Import
Taxon Description	1	0	View Add Import

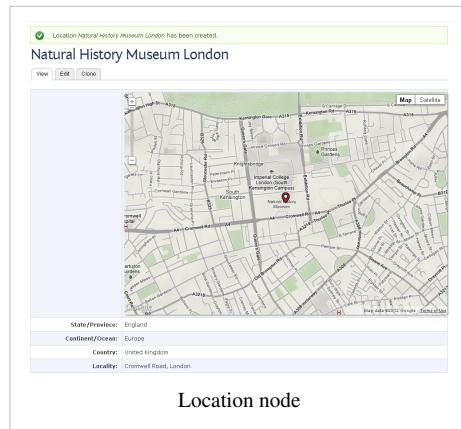
Content administration page



- Click on the <Extra Fields> tab for additional optional fields.
- Select a COUNTRY from the drop down menu.
- Use the LOCALITY field to enter information that is not covered in any of the other fields.

Add location page with extra fields showing

- Save. This creates your location record.



Add a specimen

- Click on <Content> in the Admin menu and then on the <Add> link for Specimen/Observation. There are five different vertical tabs: Required, Taxonomy, Collection, Miscellaneous, and Location. Each of these tabs has different fields that can optionally be completed in order to create a new specimen record.
- Start creating a fictitious specimen, by filling out the fields under the <Required> tab. As the tab name says, these fields are all required. The two code fields together with the catalog number generate a unique ID for this specimen record that is used as title.
- The <Taxonomy> tab contains the basic information about the identification of your specimen. The important field here is the second one, TAXONOMIC NAME, which is linked directly to all your site's vocabularies.
- Fill in some more information under the <Collection> and <Miscellaneous> tabs, this can be as little or as much as you like.

Add specimen page

- Finally, under the <Location> tab, select the location you created earlier. If you haven't created a Location previously you may add one here by clicking on <Create a new Location and use it here> option. This new Location will be available to use for other specimens/observations in the future.
- In addition to the fields above, you can also add a media file to your specimen record.
- Save.
- You can now view your specimen including thumbnails of any media you attached and a map of the location.
- Click on the <Clone> tab to create a similar specimen from the same location by just changing the data in the CATALOGUE NUMBER field.

In practice most people will (at least initially) want to enter locality and specimen records in bulk. This can be done by importing an Excel spreadsheet.

Next: Add a character project

Specimen node

Add a character project

Aim: Aim: Create a character matrix that can be used to create an interactive key or phylogenetic tree.

You need:

- A biological classification
- The character editor enabled. To enable the character editor go to <Structure> in the Admin menu and click on <Tools>. In the 'Scratchpad tools' section enable the Character editor and save.

Time: 10 min

Instructions

Our data matrix editor allows you to build a database of characters suitable for phylogenetic analysis, identification keys or tables of numeric or textural descriptions. Currently you can export controlled characters into SDD format and DNA characters into NEXUS format. Subsequent work on the editor will support the import and export of data in various formats for phylogenetic analysis, key construction and character lists and data sets formatted for publication.

- Click <Content> in the Admin menu and then on the <Add> link for Character project. Give your project a title and a brief description. Under TAXONOMIC NAME, select the taxa you would like to include in your project. If you have many taxa it will be easier to select taxa at the next stage. Save.

Add a character project

You are now viewing your new character project page but since there are no characters as yet you only see the taxonomic names.

Character project page before adding characters

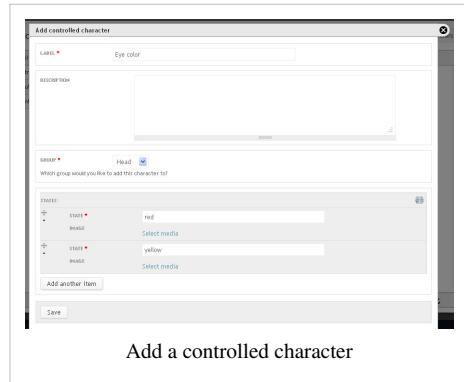
- To continue creating your character project click on the <Edit> tab. At the bottom of the matrix box there are several links.

Character project: Edit mode

- Characters have to belong to a group, so we start by adding a new group. Click on the <Add group> link at the bottom of the matrix box and enter the name of the group in the LABEL field. You can add an image and a description if needed. Save.

Character project: Add group

- The group will only show after we have added a character to the group. To do this click on the <Add controlled characters> icon at the bottom. Enter a label, select the group you just created and a couple character states. Save.



- After refreshing the page, the new character as well as the group will show in the matrix. Because of space issues, the character name is only shown as a number. Hover over this number with the mouse to view its name and the character states.
- Add a text, numeric and DNA character each.

Controlled character

- Click into the empty matrix field to enter data.
- Click on the <View> tab to show the matrix. Users can export the data in XML format via the export icon in the lower right corner.

We are working on adding more features to the characters project, for example the generating of interactive keys and phylogenetic analyses from the data.

Next: Help and support. To continue with advanced tasks go to Add a group

Enter numeric character

Add a lexicon/glossary

The screenshot shows a Scratchpad training site interface. At the top, there's a navigation bar with links for Dashboard, Content, Structure, Appearance, People, Configuration, Import, Contact us, and Report. Below the navigation is a header with 'Hello username' and a logo. A search bar is present. Underneath, there are tabs for HOME, LICE, LITERATURE, LITERATURE MINING, MEDIA GALLERY, and TEST. A breadcrumb trail shows 'Home > Glossary beginning with A'. The main content area is titled 'Glossary beginning with A'. It features a list of letters from A to Z. The letter 'A' is highlighted in blue. Below the letters, there's a list of terms starting with 'A', with 'Abdomen' being the first one shown, followed by its description: 'Posterior part of body'.

body field of the page content type. Clicking on a highlighted glossary term will link to the glossary page and hovering over the term will show the description of the term. A glossary term page consists of the term name and (optionally) the description. The general glossary page shows an alphabetical list of terms either on one page or separated into pages for each letter.

By adding parent terms a glossary can be made hierarchical and this hierarchy can be shown as a menu using the tinytax module. However a hierarchical glossary interferes with the alphabetical sorting on the general glossary page, because only the child terms for one parent term are sorted. If the glossary page is set so that one page is shown for each letter, terms starting with this letter will appear on the correct page, but within this page they will show in hierarchical order, not alphabetical order.

Create a vocabulary and add terms

To create a lexicon/glossary you need to first create the taxonomy.

- Click on <Structure> in the Admin menu and click on <Taxonomy> near the bottom.
- Click on the <Add [[Glossary#glossary_taxonomy|vocabulary]]> link.
- Minimally enter the vocabulary NAME, e.g. "Glossary". You can also add a DESCRIPTION. Select "Not a biological classification" and <Save>.

Having created a vocabulary you now need to add the list of terms. This can be done by importing your own file (see Import your own classification). Alternatively you can add terms one by one by clicking on <Add terms> when you are on the <Taxonomy> admin page or <Edit terms>. Add three example terms now. You need to add a NAME and a DESCRIPTION for each term.

Enable and configure lexicon module

- Click <Structure> in the Admin menu and then on <Tools>.
- In the 'Other' section turn the lexicon on and save. At the top of the Tools page you get a notice that the Lexicon module has been installed and a link to configure it. This configuration link is now also available in the section where you activated the module as well as under <Configuration> in the Admin menu in case you want to change the configuration later.

Aim: Add a glossary to your Scratchpad.

You need:

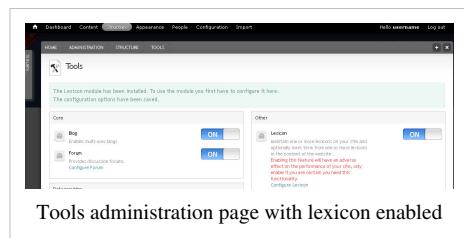
- Terms and descriptive text for these terms

Time: 10 min

Instructions

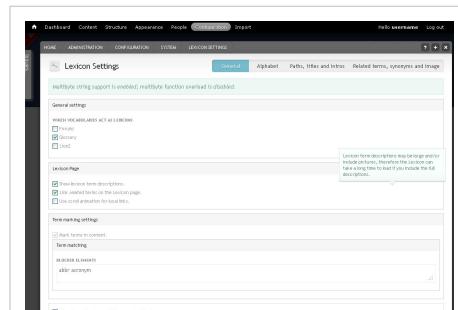
A Scratchpad lexicon/glossary is basically a taxonomy. The terms of this taxonomy will be highlighted in all filtered text fields, for example the

body field of the page content type. Clicking on a highlighted glossary term will link to the glossary page and hovering over the term will show the description of the term. A glossary term page consists of the term name and (optionally) the description. The general glossary page shows an alphabetical list of terms either on one page or separated into pages for each letter.



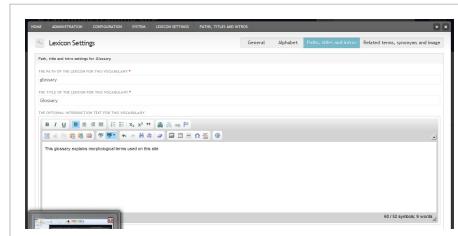
Tools administration page with lexicon enabled

- Click on the configuration link and select the vocabulary you want to use.
- Select <Show lexicon term descriptions>. Click <Save configuration>.
- There are several tabs to change other lexicon configurations.



Lexicon settings administration page

- Click on the <Path, titles and intros> tab to change the URL path to something like "glossary". If you want a link to the main glossary page to appear in the Main menu you need to create a menu item separately (see Customize menus). Add an introduction text. Save.



Lexicon administration page: Path, titles and intros tab

- Find or create a page that shows one of your glossary terms to check out your new glossary.

Additional options

Add fields

- It is possible to add more fields to the taxonomy you use for the glossary in order show more information for the terms and attach media. To do this click on <settings> for the vocabulary and then on the <Manage fields> tab where you can add new fields.

Lice anatomy

[View](#) [Edit](#) [Clone](#)

Lice have a head, thorax and abdomen

[Anterior part of the body](#)

Page with glossary terms highlighted

Add synonyms

You can add synonyms for a term, which will be highlighted, and include a link to the valid term on the glossary page. To add synonyms you have to add a special field to the glossary vocabulary.

- Click <Structure> in the Admin menu and then on <Taxonomy>.
- Click on <settings> for your glossary and then on the <Manage fields> tab.
- <Add new field> with the label "See also:" and field name "synonym". Select "Term reference" as field type and "Autocomplete term widget" as form element. Save.
- Select your glossary vocabulary and save. Save again.
- Go back to configuring the lexicon settings by clicking on <Configuration> in the Admin menu then on <Lexicon settings>. Click on the <Related terms, synonyms and image> tab.
- Select the field you just created ("See also:") and save.
- Enter a synonym term the same way you have added the other glossary terms, but in the synonym field enter the valid term. In the description field enter an explanation like "plural for XY". If you don't add a description the term will not be highlighted in Scratchpad text but it will appear on the respective glossary page.

Administrator's Tasks

Adding & Editing Users

This screenshot shows the 'first user' profile page. The user has the title 'Mrs', first name 'First', and family name 'User'. They are associated with the 'Natural History Museum' and have an 'Area of Taxonomic Interest' in 'Insects'. The user is from 'Australia' and has a history of 'History'. The 'Member for' field shows '2 min 42 sec'.

Aims: Add a new user or edit an existing one and learn about the different user roles.

You need: -

Time: 10 min

Instructions

- Click on <People> in the Admin menu. The <People> page allows you to list all users of your site and perform actions (upgrade, delete, edit) on them.
- To add a new user click 'Add user' at the top, and fill out all the relevant boxes with example data. You can add users that don't have access to the site if needed. For users that are allowed to log in, you need to check the <Allow user to login?> box at the bottom. Fill in the new fields that appear.

This screenshot shows the 'People' administration page. It lists several users with their names, types (User), statuses (active), and last logins (e.g., 'A day 20 min', '11 sec ago').

People administration page

This screenshot shows the 'Add user' page. It includes fields for 'Title' (set to 'Mr'), 'First name' (set to 'First'), 'Family name' (set to 'User'), 'Email' (set to 'user@example.com'), and 'Password' (set to 'password123'). There are also checkboxes for 'Allow user to login?' and 'Agree to Terms & Conditions of use'.

Add user page

- To edit an existing user click the check box to the left of their username and choose an update option from the dropdown menu above.
- There are four user roles:
 - Authenticated (unblocked) user: Able to access non-public content, create and edit own forum posts.
 - Contributor: Able to create content and edit own content.
 - Editor: Able to create and edit own content, and also edit other people's content.
 - Maintainer: Like editor, but also has administration privileges.
- Every registered user automatically has the first role. Check any additional roles your new user should have. Save.
- You can now add another user or close the overlay. To view your new user click again on <People> in the Admin menu and then on the username. The user profile page will open.

Note: When someone first signs up to a Scratchpad their status will be blocked and they will have no roles. The site maintainer can then choose whether to unblock the user and assign a role.

Next: Customize dashboard

Add user page with user login fields extended

User profile page

Edit the front page

Welcome to Scratchpad training site

Welcome to our example Zoological Scratchpad!

This is an example Scratchpad which contains data used in our training exercises and contains examples for all the standard types of content.

Contact us if you have any questions.

Pterophthirus splendida.jpg

RECENT PAGES

- Introduction
- username - 30.04.2012
- Lice are insects of the order Phthiraptera.
- About us
- username - 30.04.2012

RECENT BIBLIO

- Anopluren des Zoologischen Museums zu Hamburg (3. Beitrag zur Kenntnis der Anopluren)
- username - 01.05.2012
- Zur Nomenklatur einiger Anopluren-Arten

RECENT TAXON DESCRIPTIONS

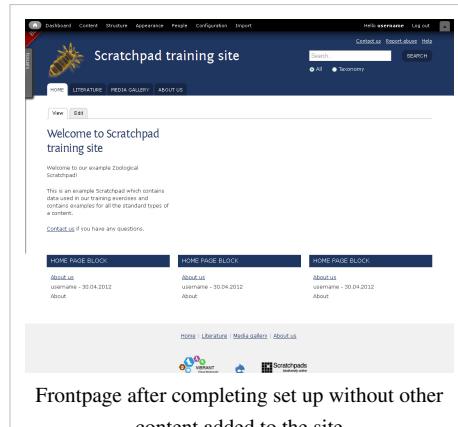
- Pediculus humanus
- username - 01.05.2012

- **Aim:** Customize the front page of your site.
- **You need:** Images, Various content
- **Time:** 10mins

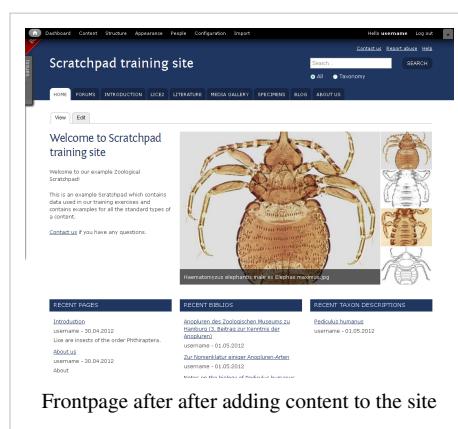
Instructions

The front page is the usual entry point to your Scratchpad. Clicking on <Home> will always bring a user back to the front page.

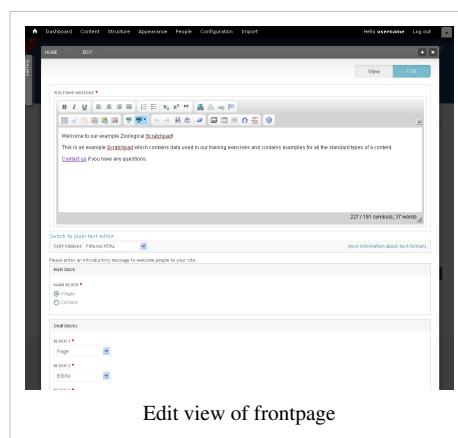
- Click on the <Home> icon to go to the front page. As part of the set up workflow you will have produced a welcome message for your front page.



- To the right of the welcome message is an image block. If you haven't added any images, yet, this space will be empty. (See add images)
- Below welcome message and images is a row of three blocks. These blocks are only visible when content is available for the respective content types. As part of the set up workflow you will have produced an about page, which shows up in the <Recent pages> block. The other two blocks are showing recent biblio nodes and taxon descriptions.



- Click on the <Edit> tab above the welcome message to have a look at the blocks. At the top of the overlay you can edit the welcome message if you want. At the bottom you can select which small blocks to show on the front page. The default is for Page, Biblio, and Taxon description. Change the blocks to content types that are most useful for your site. These blocks will always show teasers of the most recent posts for the respective content type without them having to be promoted to front page. Save. Remember that the blocks will only show if there is content available for the respective content type.



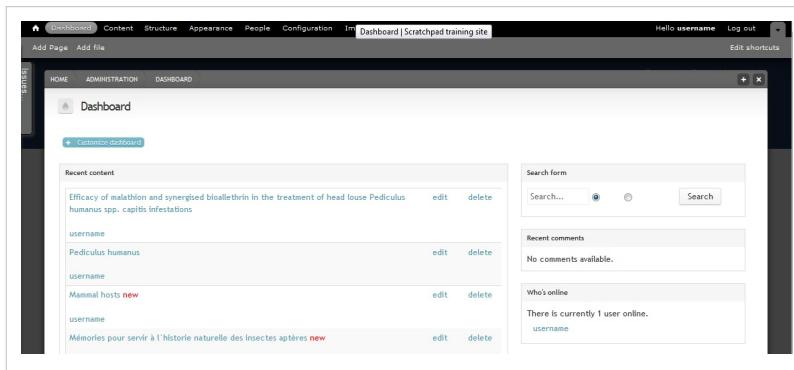
Additional information

The image block consists of four thumbnails and one larger image. The larger image changes to the image the mouse hovers over. The first four images you add to your Scratchpad will automatically be added to the front page (See Add images and other media files. After this only selected images are shown on the front page. To select an image edit the image and go to the <Publishing options> tab at the bottom of the page. Select <Promoted to front page>. You should also select <Sticky at top of lists> for the one image you want to show in the large image space. Save.

Tip: Do not use images with a white background because the outline of the image block will not look nice.

Next: Adding new users

Customize dashboard



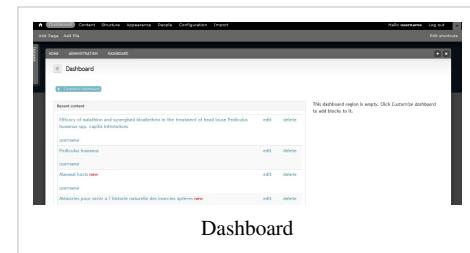
Aim: Customize the dashboard to show selected data.

You need: -

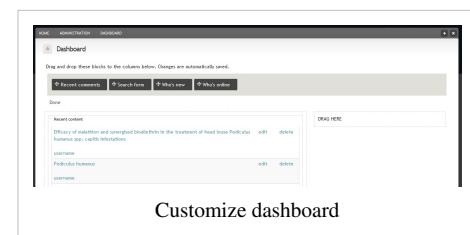
Time: 10 min

Instructions

The dashboard is an easy to read user interface that gives an overview of important site information.

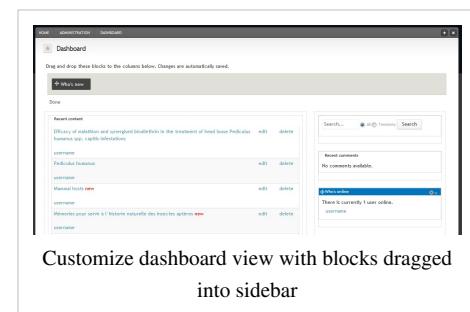


- Click on <Dashboard> in the Admin menu. By default the Dashboard shows the <Recent content> block. You can add more blocks by clicking on the <Customize dashboard> link at the top.



- A selection of inactive blocks is shown in black at the top. Drag and drop these blocks into the columns below. The wider column to the left is the main dashboard area, the smaller column to the right is called the sidebar area.
- Click the <Done> link to go back to view the dashboard.

Next: Customize menus



Customize dashboard view with blocks dragged into sidebar

Customize menus

Menu link	Enabled	Operations
Home	<input checked="" type="checkbox"/>	edit delete
Introduction	<input checked="" type="checkbox"/>	edit delete
Lice2	<input checked="" type="checkbox"/>	edit
Media gallery	<input checked="" type="checkbox"/>	edit
Import	<input checked="" type="checkbox"/>	edit
About us	<input checked="" type="checkbox"/>	edit delete

Aim: Customize the Main menu.

You need:

- Several page links or other links in the Main menu.

Time: 5 min

Instructions

- Click <Structure> in the Admin menu and then on <Menus>.

Main menu

General

Operations

List links

Import

Menu administration page

- Click on <list links> for the Main menu.
- Drop and drag the menu item into the position you prefer and save the new configuration.
- You can also add new menu items by clicking on <Add link>

Next: Customize shortcut menu

Menu link	Enabled	Operations
Home	<input checked="" type="checkbox"/>	edit delete
Introduction	<input checked="" type="checkbox"/>	edit delete
Lice2	<input checked="" type="checkbox"/>	edit
Media gallery	<input checked="" type="checkbox"/>	edit
Import	<input checked="" type="checkbox"/>	edit
About us	<input checked="" type="checkbox"/>	edit delete

Menu administration page: List links page after drag and drop of a menu item

Customize shortcut menu



Aim: Customize the shortcut menu to provide links to frequently used administration pages.

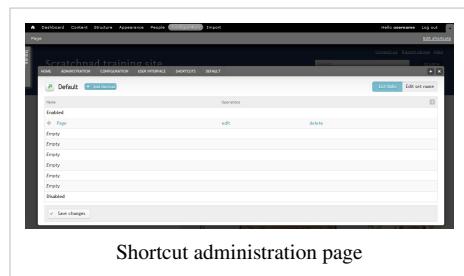
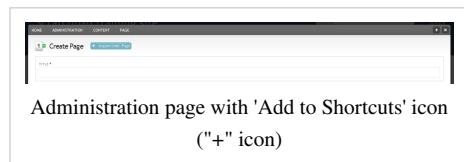
You need: -

Time: 10 min

Instructions

The Shortcut menu is below the Admin menu and can be extended by clicking on the arrow icon in the upper right corner next to the <Log out> link. It contains links to administrative pages that are frequently used.

- To add a shortcut to the menu simply go to the administrative page that you want to link to and click on the plus icon in the upper right corner. This creates a link in the shortcut menu.
- To change the name of a shortcut menu item or the order of items, extend the Shortcut menu and click on <Edit shortcuts> on the right side.



- Click on "Edit" to change a name. Save.
- Drag and drop menu items to change the order. Save changes.
- You can also add new shortcuts by clicking on <Add shortcut> and entering the NAME and PATH for the new shortcut. For example if you frequently add pages enter the NAME "Add page" and PATH "node/add/page". Save.

Additional options

- The default shortcut set is customized by the site maintainer but each user can create and customize his/her own set via the user account (Shortcut tab). The site maintainer also has the option to create different shortcut sets for different user groups.

Next: Import

Add a forum

The screenshot shows the 'Forums' section of the Scratchpad training site. The main heading is 'Forums'. Below it, there's a link to 'Add new Forum topic'. A table lists three forums:

Forum	Topics	Posts	Last post
General discussion	1	2	By username 20 hours 45 min ago
Lice taxonomy	0	0	n/a
Applied issues	0	0	n/a
Problems with human lice	0	0	n/a

Aim: Create a structured forum discussion and integrate the forum with your email.

You need:

- Forums enabled. To enable forums go to <Structure> in the Admin menu and click on <Tools>. In the 'Core' section enable forums and save.

Time: 10 min

Instructions

Add a forum topic

- Click <Content> in the Admin menu and then on the <Add> link for Forum topic.
- Enter the SUBJECT and choose the forum in which you want to submit your topic. By default Scratchpads have only one forum that is called "General discussion". Select this now. Below you will learn how to create a new forum. Enter the text of the topic in the BODY field. Save.

The screenshot shows the 'Create Forum topic' form. The subject is 'Why describe new species?'. The body is an empty rich text editor. There is a file input field labeled 'File'.

Add forum topic

- To reply to a forum topic use the <Add new comment> function.

The screenshot shows the 'Reply to a forum topic' form. It includes fields for 'Name' (Your name), 'Email' (Email address), 'Subject' (Subject), and a rich text editor for 'Comment'.

Reply to a forum topic

- You can access the forum by clicking on the <Forums> link in the Main menu.

The screenshot shows the 'Forums' page. It has a table with one row:

Forum	Topics	Posts	Last post
General discussion	1	2	By username 20 sec ago

Forums page

Create a forum

- Click on <Structure> in the Admin menu and click on 'Forums'.

The screenshot shows the 'Forums' section of the administration interface. It displays a list of forums with columns for Name, Topics, Posts, and Last post. A search bar is at the top right. A 'New' button is visible at the bottom left.

Forum administration page

- To add a new forum click on 'Add Forum', enter the name of the forum a description and a parent term if you want a hierarchy of forums. Save.

The screenshot shows the 'Add a forum' form. It includes fields for 'Name' (e.g., 'Line taxonomy'), 'Description' (e.g., 'Discussions about taxonomic problems'), 'Parent' (set to 'General discussion'), and 'Status' (set to 'Visible'). A 'Save' button is at the bottom.

Add a forum

The screenshot shows the 'Forums' administration page with a container forum named 'Applied issues'. It contains several child forums: 'General discussion', 'Line taxonomy', 'Applied issues', and 'Problems with human life'. A message at the top says 'The configuration options have been saved.'

Forum administration page with container and forums

You can also add containers to group related forums together.

Integrate a forum with your email

You can integrate your forum with your email to receive/send messages from/to the forum. This is done via your user account.

- To access your account click on <Hello [your username]> in the upper right corner and then click on the <Forum/E-mail integration> tab. You can subscribe to specific or all forums and also enter additional email addresses.

Next: Add a blog

The screenshot shows the 'Scratchpad training site' forums page. It lists four forums: 'General discussion', 'Line taxonomy', 'Applied issues', and 'Problems with human life'. Each forum has a 'Topics' and 'Posts' count and a 'Last post' timestamp.

Forums page with container and forums

Add a blog

The screenshot shows the 'Scratchpad training site' homepage with a navigation bar at the top. Below the navigation, there's a search bar and a taxonomy filter. The main content area is titled 'blog' and contains two entries:

- What I always wanted to say**: A blog entry by 'username' posted on Thu, 2012-05-03 14:04. The content is "What I always wanted to say is that Scratchpads are really great."
- Lice are nice**: A blog entry by 'username' posted on Thu, 2012-05-03 14:00. The content is "Contrary to common belief, lice are nice."

Aim: Create a blog.

You need:

- Blog enabled. To enable the blog go to <Structure> in the Admin menu and click on <Tools>. In the 'Core' section enable blog and save.

Time: 5 min

Instructions

Blogs are used to create and manage a

series of regular content entries, like general status updates, a travel diary or a running commentary. Readers can optionally comment on blog entries. They are a good way of communicating with the users of a Scratchpad.

- Click <Content> in the Admin menu and then on the <Add> link for Blog entry.

The screenshot shows a 'Create Blog entry' dialog box. The title bar says 'Create Blog entry'. The main area contains a WYSIWYG editor with the text "Contrary to common belief, lice are nice." Below the editor is a word count indicator '0/6 symbols, 1 word'.

Add blog entry

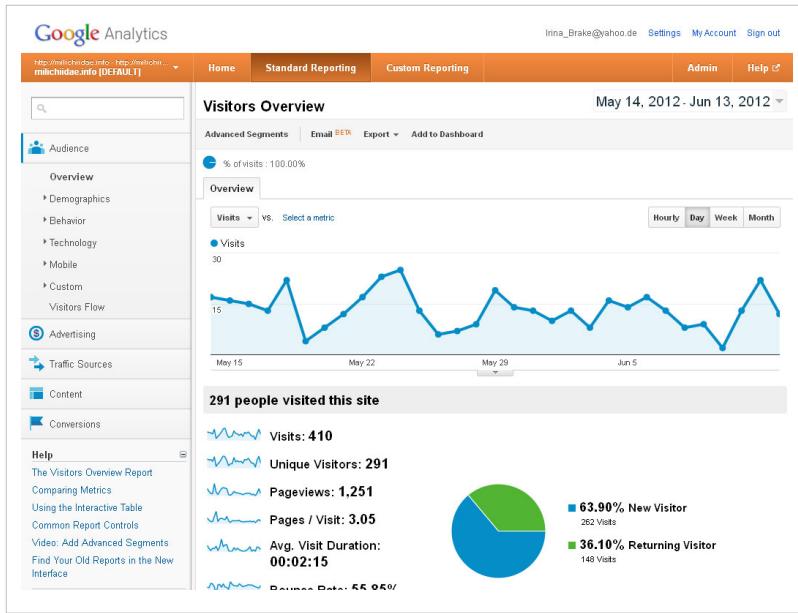
- Enter the TITLE and some BODY text. Save.

You have created a blog entry that is available on the <Blogs> tab in the Main menu. The <Blogs> tab shows the blog entries from all users. You have the options to view only blog entries from a single user by opening a blog entry from this user and clicking on the link to this user's blog that is below the blog entry. Alternatively go to the user's account and use the link there.

Next: Add locations and specimens

The screenshot shows the Scratchpad training site with a blog entry titled 'Lice are nice' by 'username'. The entry was posted on Thu, 2012-05-03 14:00. Below the entry is a comment form with fields for 'Your name', 'Subject', and 'Comment'. At the bottom of the page is a link labeled 'Blog entry'.

Enable Google Analytics



while you enable the Google Analytics module on your Scratchpad.

- To enable Google Analytics on your Scratchpad go to <Structure> in the Admin menu and click on <Tools>. In the 'Statistics' section enable Google Analytics and save.
- Configure the Google Analytics tool by clicking on the <Configure Google Analytics> link that has appeared in the 'Statistics' section. Alternatively go to <Configuration> in the Admin menu and click on <Google Analytics>.
- In the WEB PROPERTY ID field enter the enter the UA number given by Google when you signed up. Save.

After about a day you should be able to see the first data about your Scratchpad when you log into your Google Analytics account. You can only view these data via your Analytics account, not via your Scratchpad.

Aim: Enable Google Analytics.

You need: -

Time: 5 min

Instructions

Google Analytics helps you get an overview over the number of visitors on your site, where they come from and how they behave.

- Go to <http://www.google.com/analytics/features/index.html> and create a Google Analytics account for your Scratchpad. You will be given a key that starts with "UA-". Save this key or keep this page open

Help and Support

Help and support

Help and tips for working with Scratchpads can be found on the help wiki at <http://help.scratchpads.eu>

For feature requests and bug reports please use the Issues tab which appears on the left hand side of your Scratchpad when you are logged in. If you have specific questions or would like advice or help in how to best set up your site, please email the Scratchpad team at scratchpad@nhm.ac.uk. Don't be afraid to ask 'stupid' questions and don't get hung up on a problem for hours. In some cases the solution might be easy (you just have to know it...) in others it might be a bug only our programmer can solve.

Feedback

To help us improve this course please fill out the feedback form at <http://scratchpads.eu/feedback-form-training-courses>

Article Sources and Contributors

Introduction to basic Scratchpad training course *Source:* <http://help.scratchpads.eu/index.php?oldid=1370> *Contributors:* Irina Brake, Isa Vandeveld, Laurence Livermore

Log in *Source:* <http://help.scratchpads.eu/index.php?oldid=1032> *Contributors:* Irina Brake, Irina brake, Isa vandeveld, Laurence Livermore, Laurence livermore

Set up the look of your site *Source:* <http://help.scratchpads.eu/index.php?oldid=1016> *Contributors:* Irina Brake, Irina brake, Laurence Livermore, Simon rycroft

Admin menu *Source:* <http://help.scratchpads.eu/index.php?oldid=947> *Contributors:* Irina Brake, Irina brake, Laurence livermore

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Import your own classification *Source:* <http://help.scratchpads.eu/index.php?oldid=1230> *Contributors:* Irina Brake, Irina brake, Laurence Livermore

Edit a biological classification *Source:* <http://help.scratchpads.eu/index.php?oldid=1232> *Contributors:* Irina Brake, Irina brake, Isa vandeveld, Laurence Livermore

Find and optimize taxon pages *Source:* <http://help.scratchpads.eu/index.php?oldid=1066> *Contributors:* Irina Brake, Irina brake

Add literature *Source:* <http://help.scratchpads.eu/index.php?oldid=1233> *Contributors:* Irina Brake, Irina brake, Laurence Livermore

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Add images and other media files *Source:* <http://help.scratchpads.eu/index.php?oldid=1390> *Contributors:* Dimitris Koureas, Irina Brake, Irina brake, Laurence Livermore

Import *Source:* <http://help.scratchpads.eu/index.php?oldid=1089> *Contributors:* Irina Brake, Irina brake, Laurence Livermore

Find content *Source:* <http://help.scratchpads.eu/index.php?oldid=1392> *Contributors:* Dimitris Koureas, Irina Brake, Irina brake

Edit content *Source:* <http://help.scratchpads.eu/index.php?oldid=897> *Contributors:* Irina Brake, Irina brake

Add locations and specimens *Source:* <http://help.scratchpads.eu/index.php?oldid=1393> *Contributors:* Dimitris Koureas, Irina Brake, Irina brake, Simon Rycroft

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Add a lexicon/glossary *Source:* <http://help.scratchpads.eu/index.php?oldid=1083> *Contributors:* Irina Brake, Irina brake

Adding & Editing Users *Source:* <http://help.scratchpads.eu/index.php?oldid=1382> *Contributors:* Irina Brake, Irina brake, Laurence Livermore

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Customize menus *Source:* <http://help.scratchpads.eu/index.php?oldid=849> *Contributors:* Irina Brake, Irina brake

Customize shortcut menu *Source:* <http://help.scratchpads.eu/index.php?oldid=890> *Contributors:* Irina Brake, Irina brake

Add a forum *Source:* <http://help.scratchpads.eu/index.php?oldid=1225> *Contributors:* Irina Brake, Irina brake, Laurence Livermore

Add a blog *Source:* <http://help.scratchpads.eu/index.php?oldid=1226> *Contributors:* Irina Brake, Irina brake, Laurence Livermore

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