

# Scratchpads

## Basic training course

# Contents

## Articles

<b>Basics</b>	<b>1</b>
Log in	1
Set up the look of your site	2
<b>Add content to your site</b>	<b>4</b>
Add a page	4
Add a biological classification	6
Import a classification from EOL	7
Import your own classification	8
Edit a biological classification	10
Add literature	11
Add a media gallery	14
Add images and other media files	16
Add and export taxon descriptions	17
Find and optimize taxon pages	19
<b>Import, edit and find content</b>	<b>21</b>
Import	21
Edit content	22
Find content	23
<b>Site administration</b>	<b>25</b>
Edit the front page	25
Adding new users	27
Admin menu	28
Customize dashboard	29
Customize menus	30
Customize shortcut menu	31
<b>Additional tools</b>	<b>32</b>
Add a forum	32
Add a blog	34
Add locations and specimens	35
Add a character project	37

# Basics

## Log in

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

**You need:** -

**Time:** 5 min

### Instructions

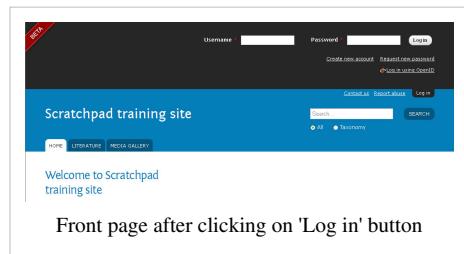
The log in on a training site when attending a training course is different from the log in on a new Scratchpad.

#### Log in for 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".
- Click on the "Hello username" link in the upper corner of the site to go to your user account.



Front page of training site

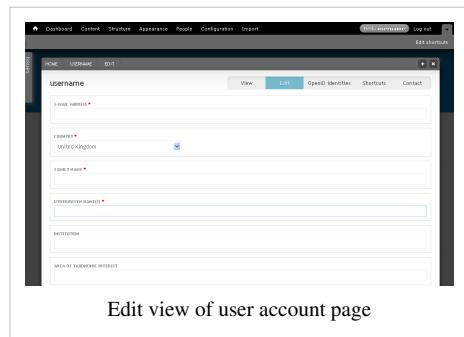


Front page after clicking on 'Log in' button

- Click on the 'Edit' tab to edit your account data.

#### Log in for new Scratchpads

- 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.



Edit view of user account page

#### Change your user account data

- Enter your user data, add a new password, accept the terms & conditions and save.

**Next:** Set up the look of your site

# Set up the look of your site

The screenshot shows the front page of the 'Scratchpad training site'. At the top, there's a header with a logo of a caterpillar, the site name 'Scratchpad training site', and a search bar. Below the header, there are three main sections: 'HOME PAGE BLOCK' containing 'About us' links, 'HOME PAGE BLOCK' containing 'About us' links, and 'HOME PAGE BLOCK' containing 'About us' links. At the bottom, there's a footer with links to 'Home', 'Literature', 'Media gallery', and 'About us', along with logos for 'VIBRANT' and 'Scratchpads'.

## 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. 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. You can also 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, upload a logo 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

The screenshot shows the 'Tools' section of the Scratchpad admin interface. It displays a welcome message: 'Welcome to your new scratchpad! Thank you for signing up.' Below it, there's a note: 'This workflow will guide you through the basic steps to get a scratchpad up and running.' It also says: 'We recommend you take a few minutes to go through them now - they can be changed later, if needed.' At the bottom, there are 'Continue' and 'Cancel' buttons.

Start of set up workflow

The screenshot shows the 'Tools' page of the Scratchpad admin interface. It lists various tools with checkboxes and status indicators (ON/OFF). The tools include:
 

- Core: Bug (Enabled multi-page bug), Forum (Enabled discussion forums), Data provider: Microsoft Word Checklist of Newcomer Taxonomy Import (ON), Encyclopaedia of life taxon page data (ON), Taxon Connect Species Import from a KML (OFF).
- Scratchpad tools: Character editor (OFF), Scratchpad character editor (OFF).
- Specimens: Database (OFF), Specimen service Enclose export (OFF).
- Statistics: Google Analytics (OFF), View (OFF).
- Views: View (OFF).

Tools page

### Change theme color

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

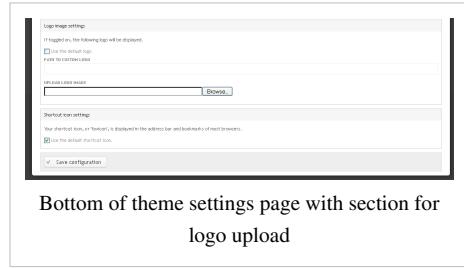
- To change the theme color, click on the 'Colors' icon in the lower right corner of your Scratchpad, select one of the colors and click on <Save>.



Footer with color pattern extended

### 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.



Bottom of theme settings page with section for logo upload

### 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.

**Next:** Add a page

# Add content to your site

## Add a page

The screenshot shows the 'Scratchpad training site' dashboard. The top navigation bar includes links for Dashboard, Content, Structure, Appearance, People, Configuration, Import, and a user dropdown. Below the header is a search bar and a menu with options: All, Taxonomy, and Page. The main content area displays a success message: 'Page Introduction has been created.' A page titled 'Introduction' is shown with a text editor containing the text 'Lice are insects of the order Phthiraptera.' Below the editor are buttons for View, Edit, and Clone. At the bottom of the page, there is a footer with links to Home, Introduction, Literature, Media gallery, and 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 various content types: Article, Article gallery, Page, and Text. The 'Page' type is selected, showing a count of 1. Below the content types, there are sections for Comments and File type. A note at the bottom states: 'This is the default content type based on the TCM4.0 Species Profile Model.'

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.
- Below the BODY field is the MEDIA field where you can link media (images, audio or video) to your page.
- 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 Page' dialog. The 'Content' tab is selected, displaying fields for Title ('Introduction'), Body (with a rich text editor containing the text 'Lice are insects of the order Phthiraptera.'), and Summary. Below the body text, there is a note: '43,737 words, 7 hours'. At the bottom of the dialog, there are buttons for 'Save to plain text editor', 'Preview', and 'Create a new page'.

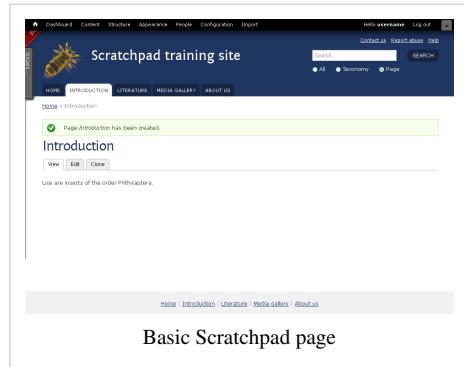
Create a new page

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

## Additional options

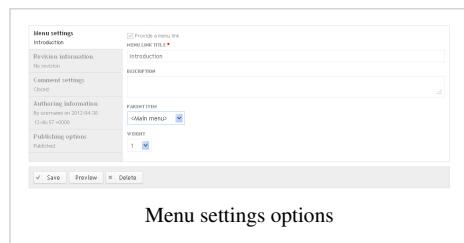
### Edit page

- 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.



### 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.



### 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 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 shows a table with four rows of terms:

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 located at the bottom left.

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. In the sidebar, under 'STRUCTURE', the 'Taxonomy' option is highlighted. Other options include 'Blocks', 'Contact form', 'Contact types', 'Pages', and 'Tasks'.

Below the sidebar, there is a message: 'Configure what block content appears in your site's sections and other regions.'

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, and TAXONOMY. Below the tabs, a button '+ Add vocabulary' is visible. The main area shows a form for adding a vocabulary:

Vocabulary name	Operations
Lice	settings edit terms add terms

At the bottom, there is a 'Save' button.

Taxonomy administration page

- 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. The vocabulary name is 'Lice'. The description is 'Lice classification'. Under 'BIOLOGICAL CLASSIFICATION', the 'Animal' option is selected. At the bottom, there is a 'Save' button.

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

The screenshot shows a web interface for a 'Scratchpad training site'. At the top, there's a navigation bar with links for Dashboard, Content, Structure, Appearance, People, Configuration, Import, Hello username, Log out, Contact us, Report abuse, and Help. Below the navigation is a search bar with 'Search...' and 'SEARCH' buttons, and a filter dropdown set to 'All' with 'Taxonomy' selected. The main content area displays the taxonomic information for *Pediculus humanus* Linnaeus, 1758. On the left, there's a sidebar titled 'LICE' with a tree view showing nodes for *Pediculus* (17), including *Pediculus clavigornis*, *Pediculus humanus* (2), *Pediculus mitsbergi* (1), and *Pediculus schaeffi*. The main panel shows the species name *Pediculus humanus* with its author 'Linnaeus, 1758' and tabs for Overview, Descriptions, and Media. Below this is a 'NOMENCLATURE' section with details: Genus: *Pediculus*, Species: *Pediculus humanus*, Usage: valid, and Synonyms: 2.

**Aim:** Import a classification through the Encyclopaedia 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.

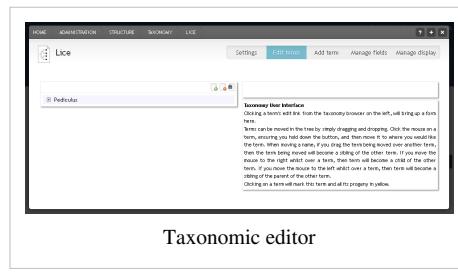
The screenshot shows the 'Import' administration page. In the top left, there's a navigation bar with links for Dashboard, Content, Structure, Appearance, People, Configuration, Import, Hello username, Log out, and Help. Below the navigation is a dropdown menu for 'Import' with 'TCS (Encyclopaedia of Life taxonomy import provider)' selected. The main content area has sections for 'Select report', 'Taxonomy', and 'Source'. Under 'Source', it says 'Report a classification directly from EOL' and 'The EOL classification service appears to be running'. There's also a note: 'ENTER THE ROOT TERM OF YOUR CLASSIFICATION - E.G. PTEROPTERA, INSECTA, AXI'. At the bottom is a large 'Import from EOL' button.

- 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.

The screenshot shows the 'Import' administration page specifically for the 'EOL Import' provider. It has the same navigation and structure as the previous screenshot. In the 'Source' section, there's a 'Search EOL' input field containing 'Pediculus' with a note: 'Enter the root term of your classification - e.g. PTEROPTERA, INSECTA, AXI'. Below the input is a list of search results: 'Species 2008 (ITIS Catalogue of Life Annual Checklist 2010) (source: 12 total)', 'O (Order)', 'F (Family)', 'G (Genus)', and 'S (Species)'. At the bottom is a large '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.



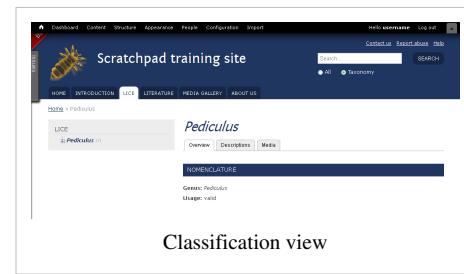
Taxonomic editor

## 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.

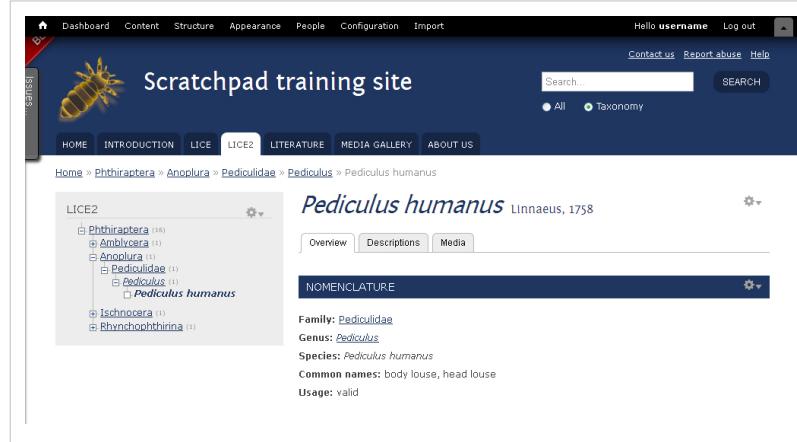
You can learn more about taxon pages on the Find and optimize taxon pages help page.

**Next:** Import your own classification or Edit a biological classification



Classification view

## Import your own classification



**Aim:** Import your own classification.

**You need:**

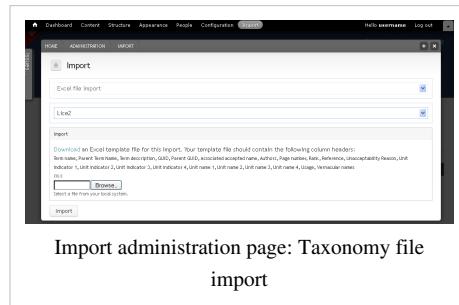
- A vocabulary (See Add a biological classification on how to add a vocabulary)
- An Excel file with a classification in ITIS format. (Download Taxonomy import example file or see Create a biological classification template file).

**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.



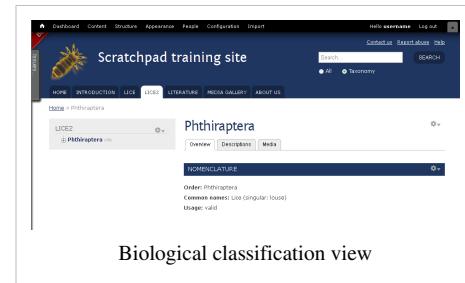
When the import is complete, a link will appear in the Main menu of your site linking to the taxon pages and the taxonomic editor will open. You can learn more about how to use the taxonomic editor on the Edit a biological classification page.



### 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.

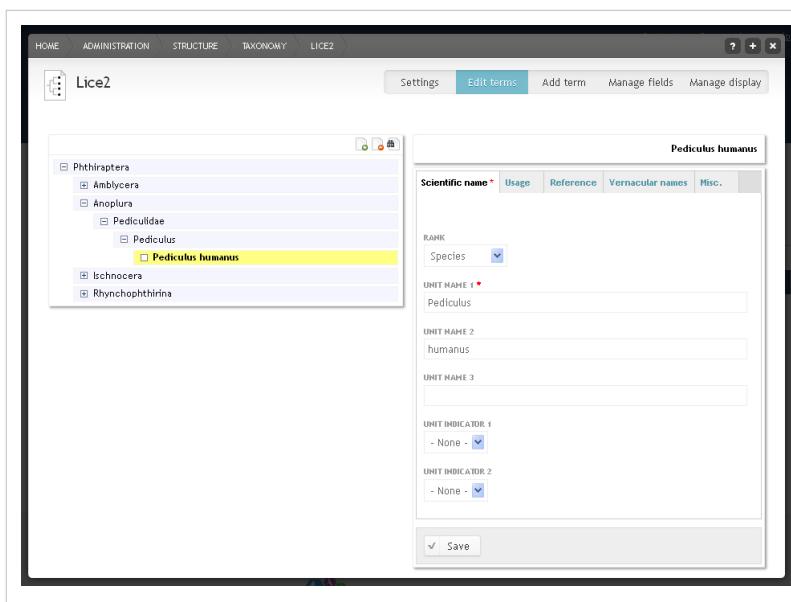


### Delete classification

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.

Biological classification view with edit option showing

- 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.

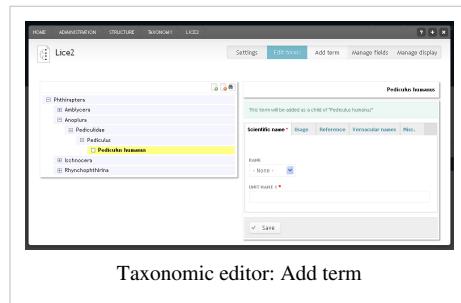
The taxonomic editor is divided into a left Tree side and right Form side. On the Tree side you can add, edit, move, delete or search for taxonomy terms. On the Form side you add/edit the data associated with a term.

- 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.

Taxonomic editor

- 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: 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

## Add literature

**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 'Import' section of the administration interface. It includes fields for 'IMPORT FILE' (with a browse button), 'FILE TYPE' (set to 'Endnote XML'), and a 'SEARCH' button. Below these are sections for 'SEARCH BY ID' (with a dropdown for 'username (scratchpad@fmnh.ac.ir)') and 'SEARCH BY TITLE' (with a dropdown for 'Scratchpad'). A 'Technology Settings' section contains an 'import' button. The status bar at the bottom indicates 'Import administration page: Biblio import'.

The screenshot shows the 'Import' section after a successful import. It displays a message: 'The file Biblio-Example.xml was successfully uploaded. 372 of 372 nodes imported.' Below this is a 'SEARCH' field and a 'Browse...' button. The status bar at the bottom indicates '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.

The screenshot shows the 'LITERATURE' section of the main interface. On the left is a sidebar with filters for 'LITERATURE', 'BIBLO', 'FILTER BY AUTHOR', 'KEYWORD', 'TAXONOMIC NAME', 'TYPE', and 'KEYWORD'. The main area lists several entries with columns for 'Authors', 'Year', and 'Title'. Each entry has a small thumbnail image and some descriptive text below it. The status bar at the bottom indicates '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.

The screenshot shows the 'BIBLO' node page for the entry 'Efficacy of malathion and synergised bioallethrin in the treatment of head louse Pediculus humanus spp. capitis infestations'. The page includes tabs for 'View', 'Edit', and 'Delete'. The 'Edit' tab is active. The entry details are listed in a table: Publication Type: Journal Article, Year of Publication: 1994, Authors: Slobodcik, B., Journal: Acta Leidensia, Volume: 52, Page numbers: 53 - 60, Date Published: 1994, and Keywords: control, malathion, pediculosis. The status bar at the bottom indicates '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.

The screenshot shows the 'Edit Biblio' interface with the title 'Edit Biblio Efficacy of malathion and synergized bioallethrin in the treatment of head louse Pediculus humanus spp. capitis infestations'. The 'Authors' section lists four entries under 'deBont,R.' with 'Primary' category and 'Author' role. There is a 'More contributors...' link. Below the authors is a 'Attachments' section with a 'file.bib' file listed, showing 'Browse...' and 'Upload' buttons.

Edit view of biblio node

## 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

The screenshot shows the 'Create Biblio' interface with a 'Publication Type' dropdown menu open, listing various options like 'Select Type...', 'Select Type...', 'Article', 'Abstract', 'Advertisement', 'Book', 'Book Chapter', 'Book Review', 'Case Report', 'Cartoon', 'Cerital', 'Conference Paper', 'Conference Proceedings', 'Database', 'Data', 'Government Report', 'Handbook', 'Journal', 'Journal Article', 'Logo/Image', and 'Multimedia'. Other fields include 'DOI Look-up', 'Title/RIS Record', 'Related Works', 'Volume: 10', 'PageRange: 103-105', 'Date Published: 1994', and 'Keywords: control, malathion, pediculus'.

Add biblio node

# Add a media gallery

The screenshot shows the 'Mammal hosts' media gallery page. On the left, there is a sidebar with various filters: IMAGE KEYWORDS (adult (2), habitus (2)), PREPARATION TECHNIQUE (no facets available), FILTER BY AUTHOR (username (4)), IMAGING TECHNIQUE (illustration (1), Light Micrograph (1), Photograph (1)), MEDIA TYPE (image (4)), TERMS (adult (2), habitus (2), illustration (1), Light Micrograph (1), Photograph (1)), and GALLERY (Mammal hosts). The main content area is titled 'Mammal hosts' and shows a brief description: 'Lice that are parasitic on mammals'. Below this are four thumbnail images of lice on different hosts.

**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.

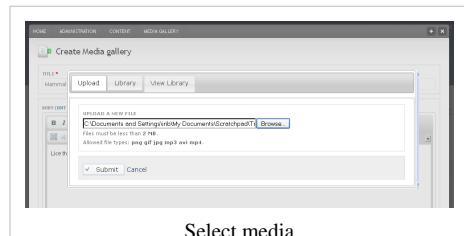
The screenshot shows the 'Content' administration page. Under the 'Type' section, 'Media gallery' is selected. A note says: 'Use this for ordinary content, such as journal pages and books.' Below it, 'Title' is set to 'Mammal hosts'. The 'Comments' section has 'Comments' checked. The 'File' section has 'File type' set to 'application (multipurpose)'. A note says: '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 is 'Mammal hosts'. The body field contains the text: 'Use this for ordinary content, such as journal pages and books.' Below the body field is a rich text editor toolbar. At the bottom right of the editor, it says '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>.



Select media

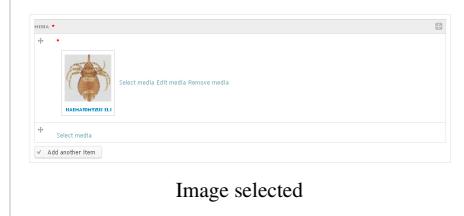
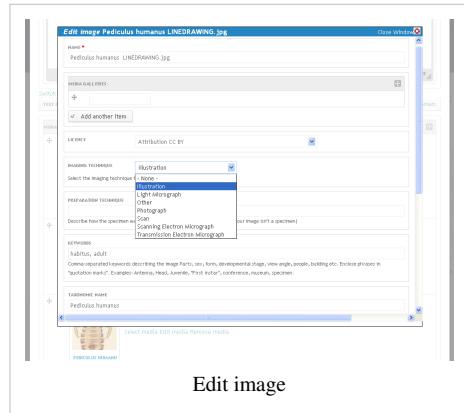


Image selected

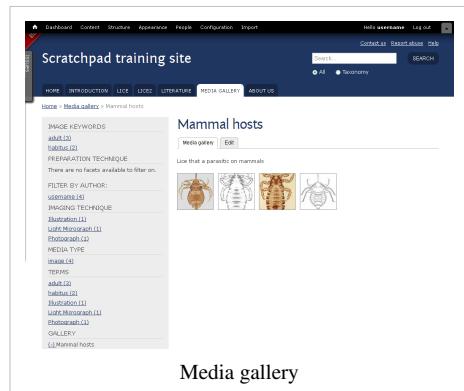
- If you want to change the creative commons license (the default licence is the one you chose during the set up workflow) or annotate your image in other ways (taxonomic name, imaging technique, keywords, etc.) click on <Edit media> next to the respective image. If you upload several images, it is faster 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.



Edit image

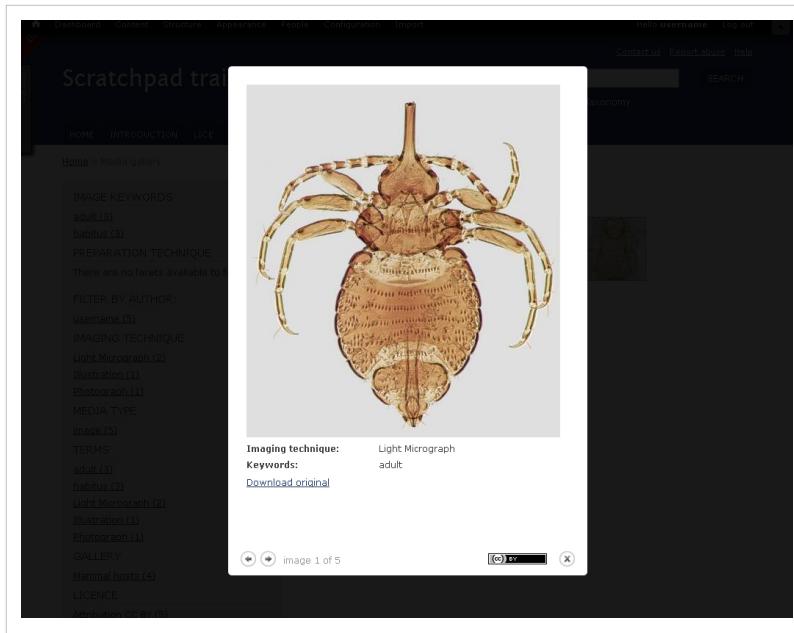
- After saving you will see your media gallery but the images will still be missing. Renew your browser page (Control+F5 on a PC) after a couple minutes to make the images appear.

**Next:** Add images and other media files



Media gallery

# 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

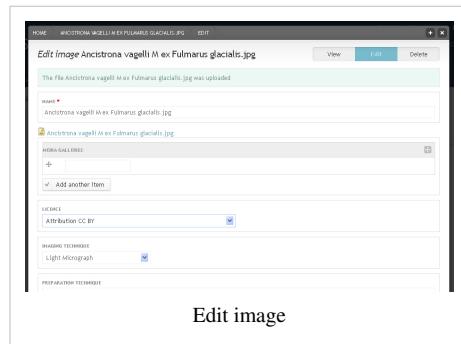
- Click <Content> in the Admin menu and then on the <Add> link for Images in the 'Files' section at the bottom.

Import administration page: Content administration page

- Browse for an image file and click the <Submit> button.

Upload image file

- 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

# Add and export taxon descriptions

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

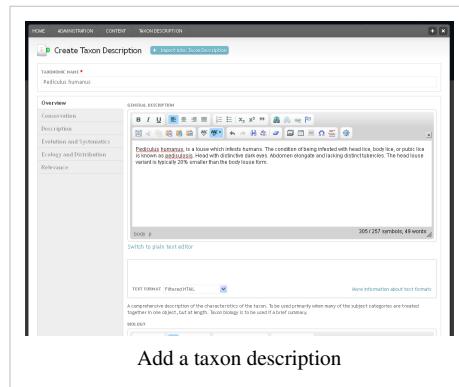
**Time:** 10 min

## Instructions

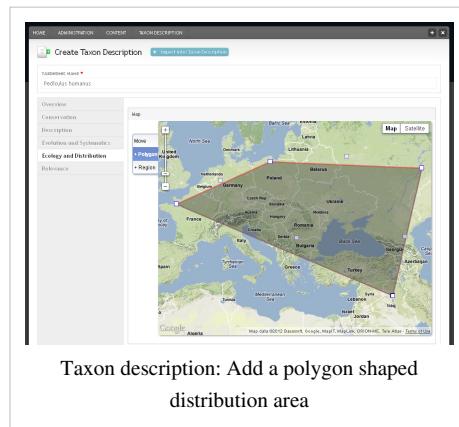
The Taxon description content type is based on TDWG's SPM (Specimen Profile Model) standard. Data in this content type can be harvested by EOL if the Scratchpad maintainer signs an agreement with EOL. Within a

### Add a taxon description with distribution map

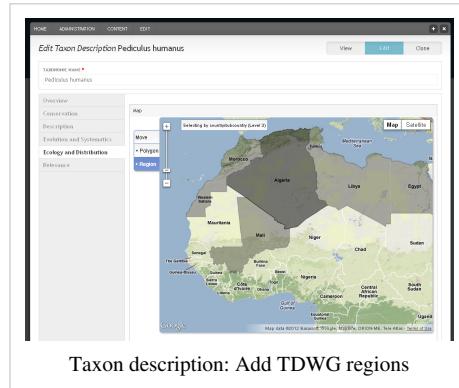
- Click <Content> in the Main menu and then on the <Add> link for Taxon description.
- Add the taxon name into the TAXONOMIC NAME field.
- Enter text into the fields as needed. We recommend to use the MORPHOLOGY field for the actual morphological description of the taxon and DIAGNOSTIC DESCRIPTION for 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.

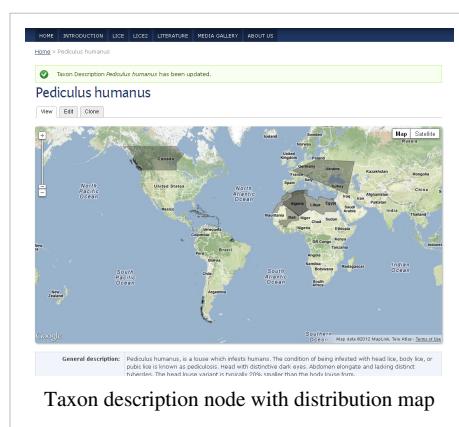


- Save.

### 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



# 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

Biological classification page

- 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.

**Next:** Edit the front page

# Import, edit and find content

## Import

The screenshot shows the 'Taxon Description' administration interface. At the top, there are buttons for 'Taxon Description' and 'Import into: Taxon Description'. Below this, a message says 'Reloading original field.module' and 'Reloading original field.attach.inc'. There are filters for 'Author', 'Published' (set to 'Any'), and 'Taxa' (set to 'Is one of'). An 'Apply' button is next to the filters. Below the filters is an 'Operations' section with a dropdown menu and an 'Execute' button. The main area is a table listing six taxa entries:

Title	Author	Updated date	Status	Operations
Ancistrona vagelli	username	2012-05-08 11:05	Published	<a href="#">edit</a> <a href="#">delete</a>
Columbicola columbae	username	2012-05-08 11:05	Published	<a href="#">edit</a> <a href="#">delete</a>
Haematomyzus elephasitis	username	2012-05-08 11:05	Published	<a href="#">edit</a> <a href="#">delete</a>
Pediculus humanus	username	2012-05-08 11:05	Published	<a href="#">edit</a> <a href="#">delete</a>
Pediculus humanus	username	2012-05-01 15:14	Published	<a href="#">edit</a> <a href="#">delete</a>

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

**You need:**

- A biological classification if your data should be linked to one.

**Time:** 10 min

## Instructions

To import data into your Scratchpad they need to be in the correct format reflecting 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 as well as field values for the respective content type. Fill this file with your data and import into the Scratchpad.

The screenshot shows the 'Import into: Taxon Description' administration interface. At the top, there are buttons for 'Import' and 'Delete items'. Below this, a message says 'Download an Excel template file for this import. Your template file should contain the following column headers: Title, GID, Taxonomic name, Map, Media, Associations, Behavior, Biology, Conservation status, Cyclicity, Cytoplogy, Diagnostic description, Diseases, Dispersal, Diet, Distribution, Ecology, General information, Genetics, Growth, Habitat, Life cycle, Life expectancy, Look alike, Management, Ingestion, Molecular biology, Morphology, Name, Phenology, Reproduction strategy, Processes, Reptiles, Reptiles, Reptiles, Reptiles, Reptiles, Reptiles, Topic, Threats, Users, Group audience, Group content visibility'.

Below the message, there is a file input field with the path '24.xls' and a 'Browse...' button. A note says 'Select a different file from your local system.' Below the file input is an 'Import' button.

Below the interface, the text reads: 'Administration page for importing taxon descriptions'

## 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. Specimen/Observation.
- 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 be appear. Select the correct name.
- Fill the template file with your data and save.

The screenshot shows an Excel spreadsheet titled 'Import template for taxon descriptions'. The columns are labeled: Title, GID, Taxonomic name, Map, Media, Associations, Behavior, Biology, Conservation status, Cyclicity, Cytoplogy, Diagnostic, Diseases, Dispersal, Diet, Distribution, Ecology, General information, Genetics, Growth, Habitat, Life cycle, Life expectancy, Look alike, Management, Ingestion, Molecular biology, Morphology, Name, Phenology, Reproduction strategy, Processes, Reptiles, Reptiles, Reptiles, Reptiles, Reptiles, Reptiles, Topic, Threats, Users, Group audience, Group content visibility.

The first row contains the column headers. The 'Taxonomic name' column has a dropdown arrow indicating it is a list-based field. The 'Title' column has a red header, indicating it is a required field.

## 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.

**Next:** Edit content

Overview of taxon descriptions administration page

# Edit content

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

**You need:**

- A content type with several nodes.

**Time:** 10 min

## Instructions

Content can either be edited by going to the respective node and clicking on the <Edit> tab or by using the grid editor to update several nodes at once.

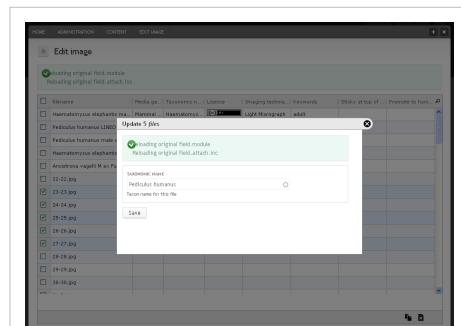
- Click <Content> in the Admin menu and then on the <Grid> link for a content type that has some data.
- You will see a matrix with a row for each node and columns for selected fields of this content type. The rows are ordered chronologically, with the most recent nodes at the top.
- If the fields of the respective content type are sorted into groups on different tabs, these tabs will show in the grid editor, too. To gain

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



Grid editor: Editing taxonomic name field for 5 nodes at once

## 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 on the Scratchpad and finds all the content that is linked to this term. 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.

Results of simple search

## 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.

## 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

# Site administration

## Edit the front page

The screenshot shows the front page of a Scratchpad site titled "Scratchpad training site". The main content features a large, detailed black-and-white micrograph of a louse (Pterophthirus splendida). Below the image is a caption: "Welcome to Scratchpad training site". To the left of the image is a text block: "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 a content." Below this is a link: "Contact us if you have any questions." At the bottom of the page are three sections: "RECENT PAGES", "RECENT BIBLIOS", and "RECENT TAXON DESCRIPTIONS". Each section lists a few items with their titles and dates.

**Aim:** Customize the front page of your site.

**You need:**

- Images
- Various content

**Time:** 10 min

## Instructions

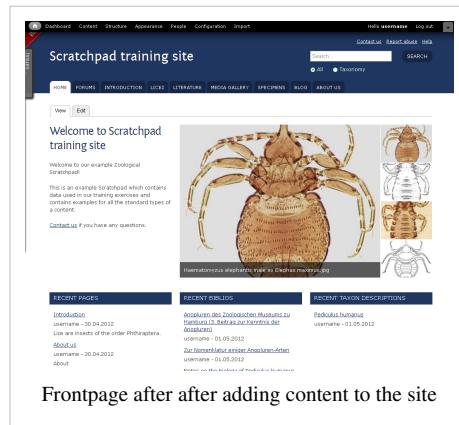
The front page is the usual entry point to your Scratchpad. Clicking on <Home> will always bring a user back to the front page.

- 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.

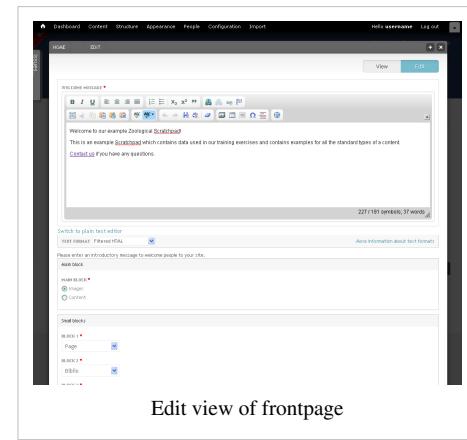
The screenshot shows the front page of the Scratchpad site after the initial setup. The layout is much simpler and cleaner. It includes a header with the site title, a search bar, and navigation links. The main content area has been reduced to a single line of text: "Welcome to Scratchpad training site". Below this is a small text block about the example Scratchpad. The footer contains a navigation menu with links to Home, Literature, Media gallery, and About us, along with some social media icons.

Frontpage after completing set up without other content added to the site

- 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.



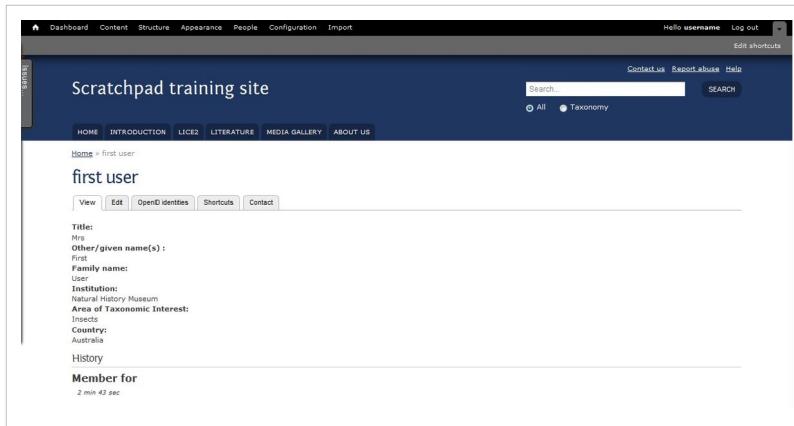
## Additional information

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

# Adding new users



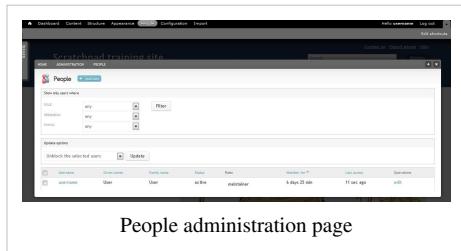
**Aim:** Add a new user and learn about the different user roles.

**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.
- 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.

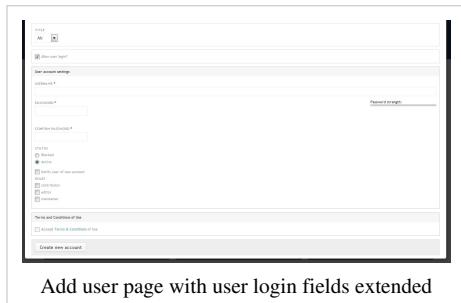


People administration page



Add user page

- There are four user roles:
  - Authenticated 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.



Add user page with user login fields extended

- 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.

**Next:** Admin menu

User profile page

# 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.

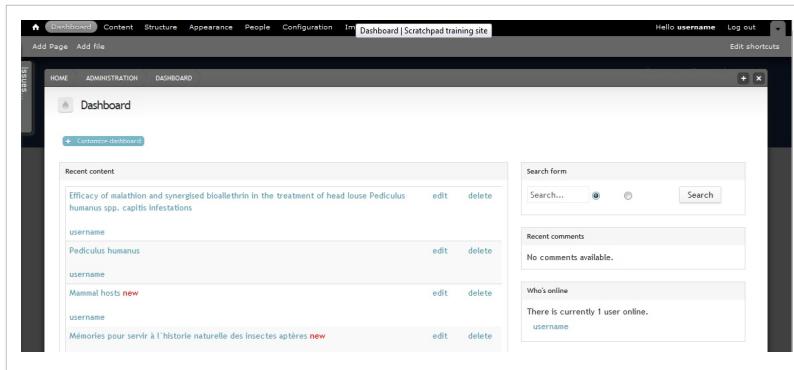
- The first of the admin links is the <Home> icon that will always bring you back to the front page of the site.
- The <Dashboard> gives administrators a customizable overview of important site information. You can add and remove items from the dashboard (see Customize dashboard), or you can disable 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.

## Additional options

- Customize dashboard
- Customize shortcut menu

**Next:** Customize dashboard

# Customize dashboard



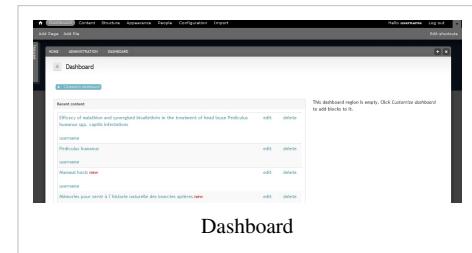
**Aim:** Customize the dashboard to show selected data.

**You need:** -

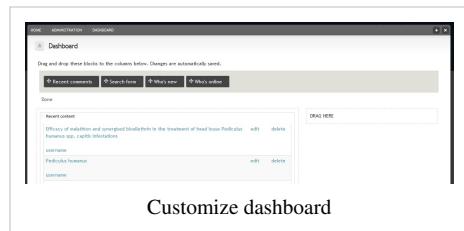
**Time:** 10 min

## Instructions

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

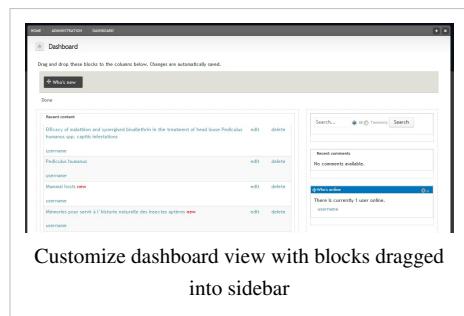


- Click on <Dashboard> in the Admin menu. By default the Dashboard shows the <Recent content> block. You can add more blocks by clicking on the <Customize dashboard> link at the top.



- 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 menus

Menu link	Enabled	Operations
Home	<input checked="" type="checkbox"/>	edit delete
Introduction	<input checked="" type="checkbox"/>	edit delete
Uice2	<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

**Save configuration**

**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>.

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 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.

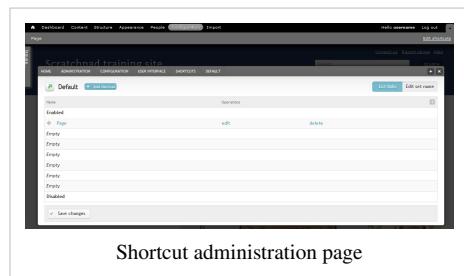
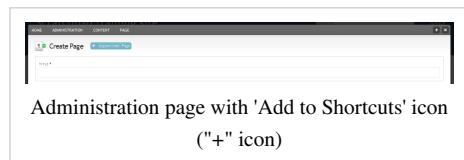
**You need:** -

**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

# Additional tools

## Add a forum

The screenshot shows the 'Forums' section of the Scratchpad training site. It includes a search bar and navigation links for Contact us, Report abuse, and Help. The forums listed are:

Forum	Topics	Posts	Last post
General discussion	1	2	By <a href="#">username</a> 20 hours 45 min ago
Lice taxonomy	0	0	n/a
Applied issues			
Forums related to applied issues			
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, 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.
- To reply to a forum topic use the <Add new comment> function.

The screenshot shows the 'Create Forum topic' dialog box. It includes fields for SUBJECT (Why describe new species?), BODY (General discussion), and BODY POST (text area with rich text editor). A note at the bottom says 'Do we need to describe any more species?'.

Add forum topic

The screenshot shows a forum topic titled 'Why describe new species?'. It includes a 'Reply to this topic' button at the bottom.

Reply to a forum topic

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

Forums page

## Create a forum

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

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.

Add a forum

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

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 short text entry with the timestamp 'Thu, 2012-05-03 14:04 -- username'.
- Lice are nice**: Another short text entry with the same timestamp.

**Aim:** Create a blog.

**You need:**

- Blog enabled. To enable the blog go to <Structure> in the Admin menu, 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 the 'Create Blog entry' dialog box. It has a title bar 'Create Blog entry' and a toolbar with various icons. The main area contains a WYSIWYG editor with the text 'Contrary to common belief, lice are nice.' The status bar at the bottom right shows '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 a blog entry titled 'Lice are nice' by 'username'. The entry was created at 14:04 on May 3, 2012. It contains the text 'Contrary to common belief, lice are nice.' and a timestamp 'Thu, 2012-05-03 14:04 -- username'. Below the entry is a comment form with fields for 'Your name', 'Subject', and 'Comment'.

# Add locations and specimens

The screenshot shows a specimen observation page for BMNH - E - 123. The page includes a navigation bar with links like HOME, FORUMS, INTRODUCTION, LICE2, LITERATURE, MEDIA GALLERY, SPECIMENS, BLOG, and ABOUT US. A breadcrumb trail indicates the current location: Home > BMNH - E - 123. A green success message at the top states "Specimen/Observation BMNH - E - 123 has been updated." The main content area displays the following details:

- SPECIMEN/OBSERVATION**
- [View all Specimen/Observations](#)
- [Natural History Museum London Specimen/Observations](#)
- LICE2**
- Pediculus humanus**
- BMNH - E - 123**
- Basis of record:** Preserved Specimen
- Institution code:** BMNH
- Collection code:** E
- Catalogue number:** 123
- Taxonomic name:** [Pediculus humanus](#)
- Type status:** Nontype
- Date collected:** Monday, April 25, 2011 to Tuesday, May 3, 2011
- Media:** (empty)
- Count:** 5
- Lifestage:** adult
- Sex:** Female

Below the specimen details is a section titled **LOCATION** which includes a map showing the locality in 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>

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

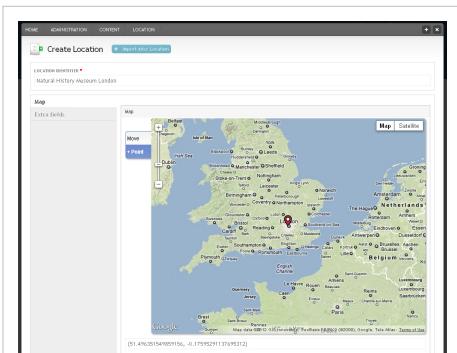
### You need:

- A biological classification
- Darwincore enabled. To enable the Darwincore module go to <Structure> in the Admin menu, click on <Tools>, in the 'Core' 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



Add location page with map showing

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.

The screenshot shows the Content administration page. It lists various content types with their counts and actions:

Name	Published	Unpublished	Action
Article	372	0	<a href="#">View</a> <a href="#">Add</a> <a href="#">Import</a>
Blog entry	2	0	<a href="#">View</a> <a href="#">Add</a> <a href="#">Import</a> <a href="#">Grid</a>
Forum topic	1	0	<a href="#">View</a> <a href="#">Add</a> <a href="#">Report</a> <a href="#">Grid</a>
Image	0	0	<a href="#">View</a> <a href="#">Add</a> <a href="#">Import</a> <a href="#">Grid</a>
Media gallery	1	0	<a href="#">View</a> <a href="#">Add</a> <a href="#">Import</a> <a href="#">Grid</a>
Page	2	0	<a href="#">View</a> <a href="#">Add</a> <a href="#">Import</a> <a href="#">Grid</a>
Specimen/Observation	0	0	<a href="#">View</a> <a href="#">Add</a> <a href="#">Import</a> <a href="#">Grid</a>
Topic description	1	0	<a href="#">View</a> <a href="#">Add</a> <a href="#">Import</a> <a href="#">Grid</a>

Below the table, a note states: "A location which conforms to Darwincore, and can be associated with multiple specimens." There is also a note about "Topic description content type based on the TDWG Specimen Profile Model".

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.

Location page

## 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.
- Finally, under the <Location> tab, select the location you created earlier.
- In addition to the fields above, you can also add a media file to your specimen record.

Add specimen page

- 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 page

## 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, click on <Tools>, in the 'Core' 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

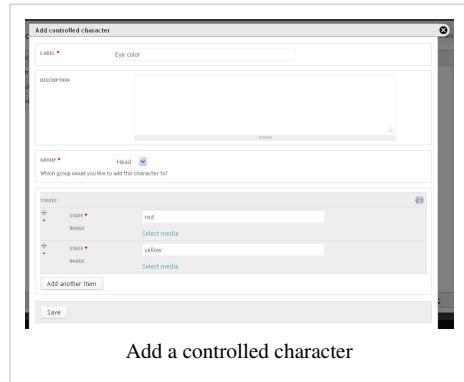
- To continue creating your character project click on the <Edit> tab. At the bottom of the matrix box there are several links.

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.

Head	
Classification	1
Ancistrona va...	
Pediculus hu...	<b>Eye color</b>
Columbicola c...	Controlled character
	0: red
	1: yellow

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

Head				
Classification	1    2    3    4			
Ancistrona va...	0	Ro...	0.3	Width of head
Pediculus hu...	1	Mo...		Numeric character
Columbicola c...				mm

Enter numeric character

# Help and support

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Help and tips for working with Scratchpads can be found on the help wiki.

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<sup>[1]</sup>].

## References

[1] <http://scratchpads.eu/feedback-form-training-courses>