

# Using Specify 6 at the Joseph Moore Museum

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The Joseph Moore Museum's extensive natural history collection is cataloged using the Specify 6 database. Using Specify 6 can be somewhat challenging to use at first. This documentation is designed to guide user through the cataloging process. Suggestions for updates, improvements or corrections should be directed to the Collections Manager.

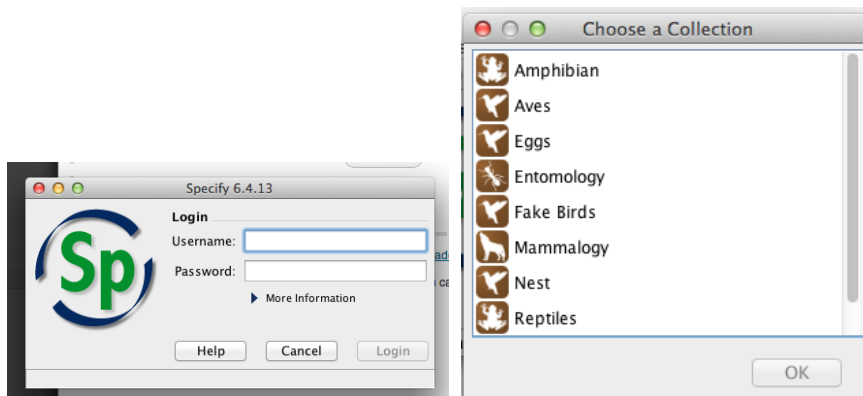
## A few things to know before you start:

1. Specify always checks for updates when you start the program. **NEVER choose to update the program unless specifically told to by Heather or Ann-Eliza.** Updating the program has ramifications across all systems and can cause a very long work stoppage for all users.
2. Specify will often ask if you want to backup the database. You may skip this step.
3. The magnifying glass is your "best friend" in Specify 6. In order to avoid duplication and to maintain consistency in data entry **always "search" before "adding."**

## Getting Started

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Specify users must have a login. See Heather or Ann-Eliza to get a login.



Enter your username and password, click 'login,' and then, in the new window that opens, choose the collection you would like to access by double clicking on the collection

name. Note you will not see the entire list of collections, you will only see the collections allowed for your user name.

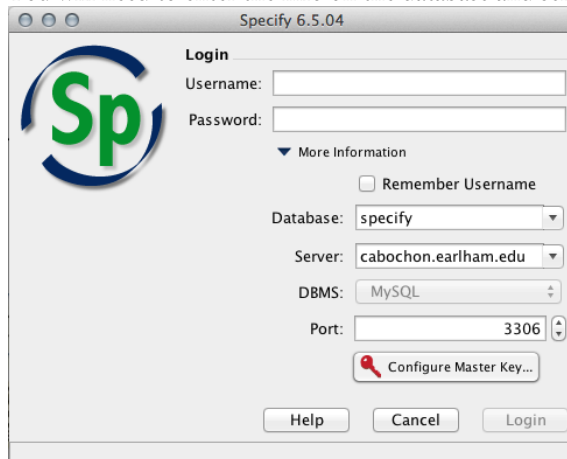
Logins are “machine specific.” That means that when you login to Specify 6 for the first time on a particular computer, you will need to complete an extra step of generating a master key.

#### **Manager note: Adding New Users to Specify**

1. Before adding a new user the individual must be added as an “Agent” in Specify. If you add a user to a collection before adding as an Agent, you will be given the option to search for an agent or create a new one. *Always search first* to prevent creating duplicates.
2. If the new user is a student, make a note in the “specialties” field on the Agent form that they are a student. If they are enrolled in a class, enter the class and year. Members of the collections applied group should be so noted with the year.
3. Users need to be added individually to each collection and should be assigned the lowest level of access available for the work they need to do. Most students will be “limited access” users.

#### **Manager note: adding Specify to a workstation**

1. Specify can only be used on a “wired” network connection. Turn off EC wireless.
2. Make sure IT has the workstation’s IP address.
3. Confirm that the workstation has the latest version of java (if now download/update as needed)
4. Download and install the correct version of Specify from the Specify website
5. Run specify and login in. You will need to generate a master key etc.
6. You will need to enter the info on the database and server (see below).

The image shows a screenshot of the 'Specify 6.5.04' login window. On the left is a logo with a green 'Sp' inside a blue circular arrow. The main area is titled 'Login' and contains fields for 'Username:' and 'Password:'. Below these is a section titled 'More Information' with a checkbox for 'Remember Username'. Further down are dropdown menus for 'Database:' (set to 'specify'), 'Server:' (set to 'cabochon.earlham.edu'), and 'DBMS:' (set to 'MySQL'). A 'Port:' field is set to '3306'. At the bottom of this section is a button with a red key icon labeled 'Configure Master Key...'. At the very bottom of the window are three buttons: 'Help', 'Cancel', and 'Login'.

### Adding Agents

Agents can be added as “person” “group” “organization” or “other”

Most users will be added as “person.” “Group” can be used to group individual, but related, agents. For example you can create a group for a class. Each student would be added as an individual agent then added to the group.

### Adding Agents to collections

Once someone is an agent they can be added as needed to the collections that they will be working in. This function can be found in system→system setup →security tools

## Searching

It is important to avoid duplication and inconsistency in data entry. To limit both you should always “search” before “adding” something. This applies to users, names, locations, etc. Locations are particularly problematic.

NB: Wildcard searches that use an \* are very useful because they can search for various permutations of a common entry.

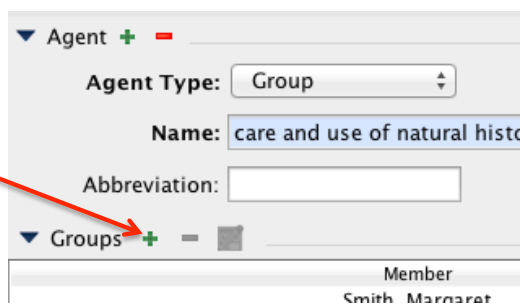
Examples:

- \*earlham\* will search for strings that contain earlham
- \*earlham will search for strings that start with something else, but have earlham at the end
- earlham\* will search for things that start with earlham, but have something else after them

### Example:

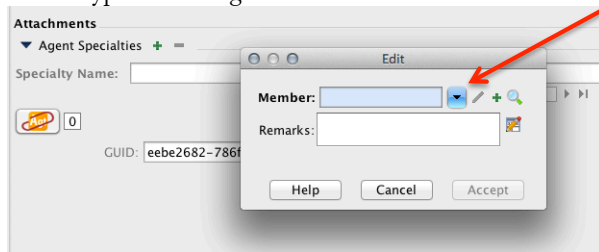
Searching when creating a group of agents

1. Open the group
2. Click the green + sign next to “groups.”

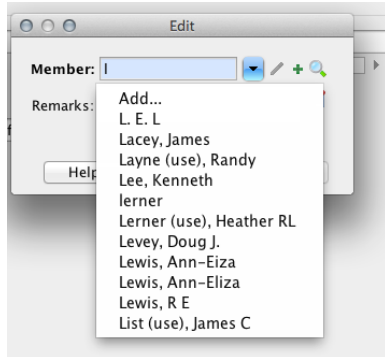


The screenshot shows a software interface for creating a group of agents. At the top, there is a section labeled 'Agent' with a green plus sign and a red minus sign. Below this, there is a dropdown menu for 'Agent Type' set to 'Group'. Below that is a text field for 'Name' containing 'care and use of natural histo'. Below the name field is a text field for 'Abbreviation'. At the bottom, there is a section labeled 'Groups' with a green plus sign, a red minus sign, and a grey square icon. A red arrow points to the green plus sign. Below the 'Groups' section is a table with a header 'Member' and one row containing the text 'Smith Margaret'.

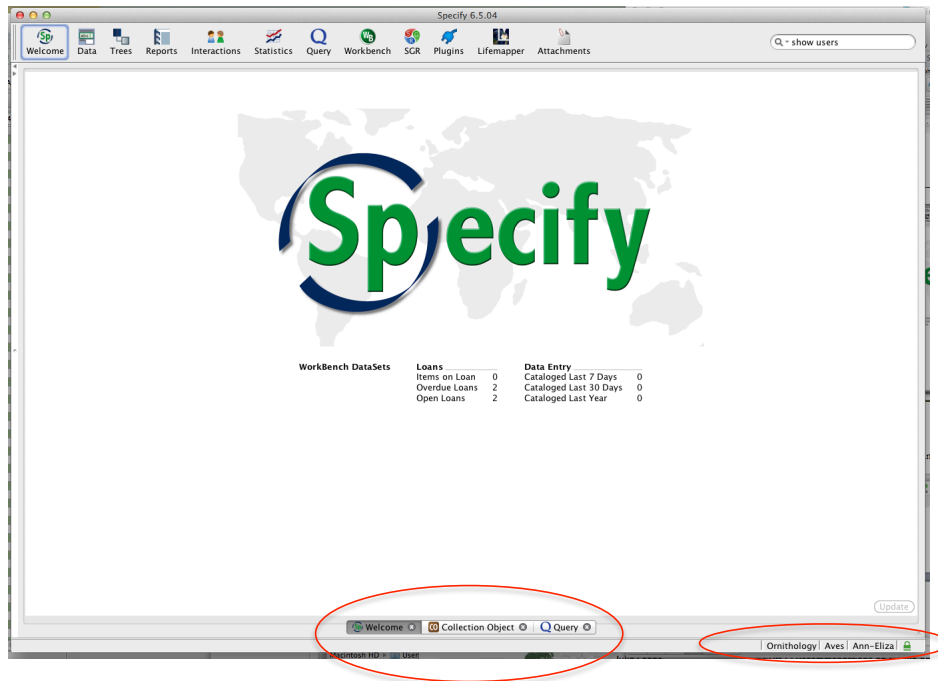
3. The window below will open. The drop down menu will not activate until you type something in the member box



doesn't work now, but type a letter and .....



# The User Interface



Once logged in you will see the screen above, which has useful info:

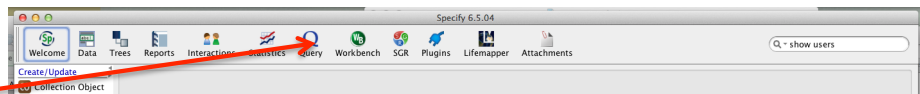
- Top: this is the tool bar from which to choose what you want to do
- Bottom center: shows what you have open. To close something click the “x”
- Bottom right shows discipline, collection, user, and security info

An overview of the interface can be found on the Specify 6 YouTube Channel:

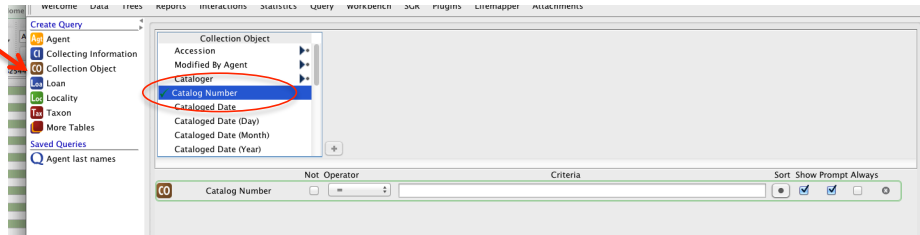
<https://www.youtube.com/watch?v=UVweVFZXWKw>

## Queries

If you are looking for a particular specimen (or pretty much want to find anything already in the database), use the query function to build a query.



To find a particular collection object (for example by catalog number) choose Collection Object and design your query

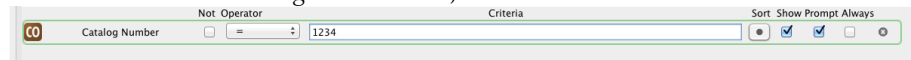


For a particular collection number follow these instructions:

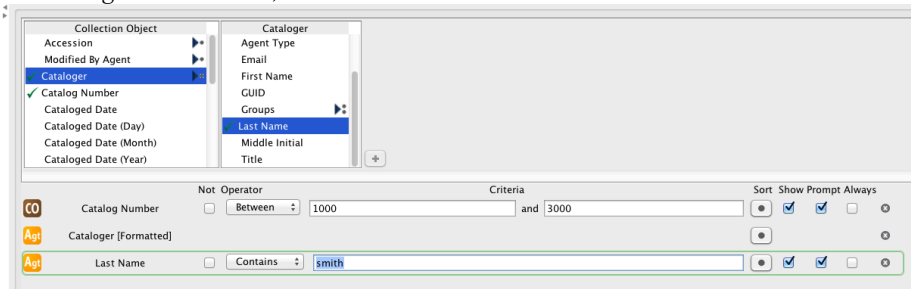
1. Choose "Collection Object" from the side bar of the query menu
2. Choose "Catalog Number" from the column of options under "Collection Object"
3. Complete the criteria in the lower part of the form.
4. You may choose multiple options from above
5. Click the search button in the lower right of the window
6. To remove an operator click the x at the far right of the entry

#### Examples:

To find the item with catalog number 1234, the window should look like this:



To find collections objects cataloged by a specific person with the last name "Smith" and in the range of 1000-3000, it would look like this



To find all of the robins in a range of catalog numbers the window would like this

Collection Object

- Cataloged Date (Month)
- Cataloged Date (Year)
- Col Obj Attribute
- Collecting Information
- Collection Object Attachments
- Determinations**
- EC Number
- Guid

Determinations

- Determined Date
- Determined Date (Day)
- Determined Date (Month)
- Determined Date (Year)
- Guid
- Taxon**
- Preferred Taxon
- Type Status

Taxon

- Author
- Class
- Class Author
- Common Name**
- Family
- Family Author
- Full Name
- GUID

Criteria

Not Operator

Between 1000 and 3000

Sort Show Prompt Always

Contains robin

### Viewing your results:

When the search is complete and if there are items that meet your criteria, it will look something like this

Search Results - 21

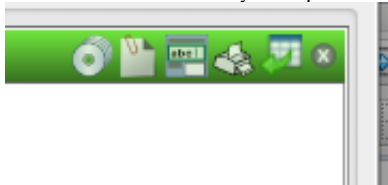
Catalog Number	Determinations [Aggregated]	Taxon [Formatted]	Common Name
1039	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1075	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1120	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1131	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1193	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1427	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1778	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1793	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1853	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1854	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
1856	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2074	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2085	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2086	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2123	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2289	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2503	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2566	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2572	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2930	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin
2933	Turdus migratorius (current)	Turdus migratorius, American Robin	American Robin

Select All Deselect All

To view records highlight the ones you want to see: Click to highlight one, click and drag to highlight a range, or choose "Select all" in the lower left and then click the form icon and the object form(s) will open.

If you selected more than one item from the results list you can scroll through using the arrows at the bottom

The icons below show your options for search data



- CD:** Creates a record set of the found data which will save the results in the left side bar
- Clipped paper:** Shows any attachments to the records (photos etc.)
- Form:** will open the form(s), this is the one used most often. It opens the form view and you can scroll through all the forms
- Printer:** prints the entire grid of results
- Spreadsheet:** exports the grid to Excel
- X:** closes the window. You will be asked whether you want to save the query. If you answer yes, the saved query will appear in the left side bar and you can access/run it again at a later date.

Ann-Eliza Lewis 8/18/14 12:58 PM  
**Comment [1]:** (AE:verify that it runs again and doesn't just open the old dataset.)