Scratchpads Training Documentation

Release 0.1

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Scratchpads are an easy and effective way to present your data online.

Whether you just want to publish on the web, construct a database or assemble a formal manuscript, Scratchpads are able to help!

CHAPTER 1

Contents

1.1 Getting started

Introduction to Scratchpad training course

The Scratchpad 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 enable you to independently explore your Scratchpad after the event. By the end of the course you should be able to:

- Customise your site including the front page
- Add and edit biological classifications (manually and through import services)
- Add taxon descriptions and images to create taxon pages
- Import and manage your bibliography
- Find your content using different search methods
- Administer site users
- Control and explore site functionality with site tools

For the purposes of the training courses each participant will be assigned a temporary training site to work with. Your trainer will provide your training site address.

The training sites will be available to the participants for two weeks after the training course. After this period all temporary training courses will be erased. If at the end of the course you'd like your site to become a standard Scratchpad, please send an email to scratchpads@nhm.ac.uk and we will arrange it for you.

To apply for a normal Scratchpads site please use the appropriate form located at http://get.scratchpads.eu.

1.1.1 Training material

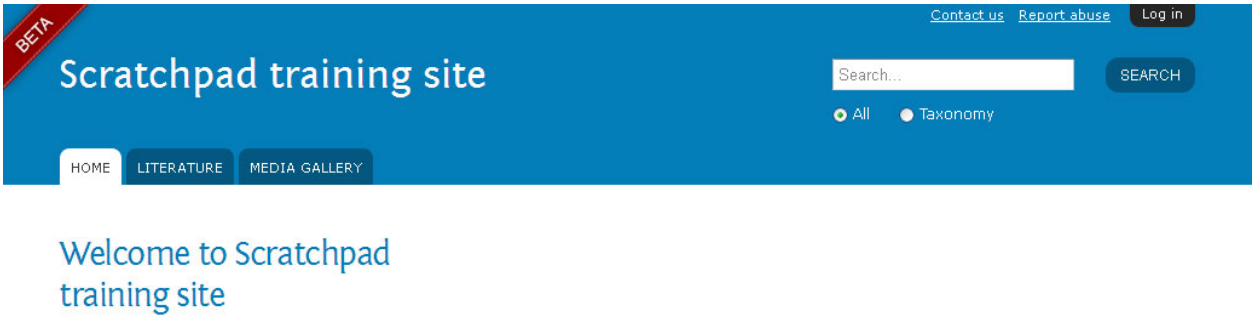
In order to go through the different functions of Scratchpads you will need to work with some sample material.

You can download such material below:

- Zoological Scratchpad Training files can be downloaded from `Zoological_Training_Materials`
- Botanical Scratchpad/eMonocot Training files can be download from `Botanical_Training_Materials`

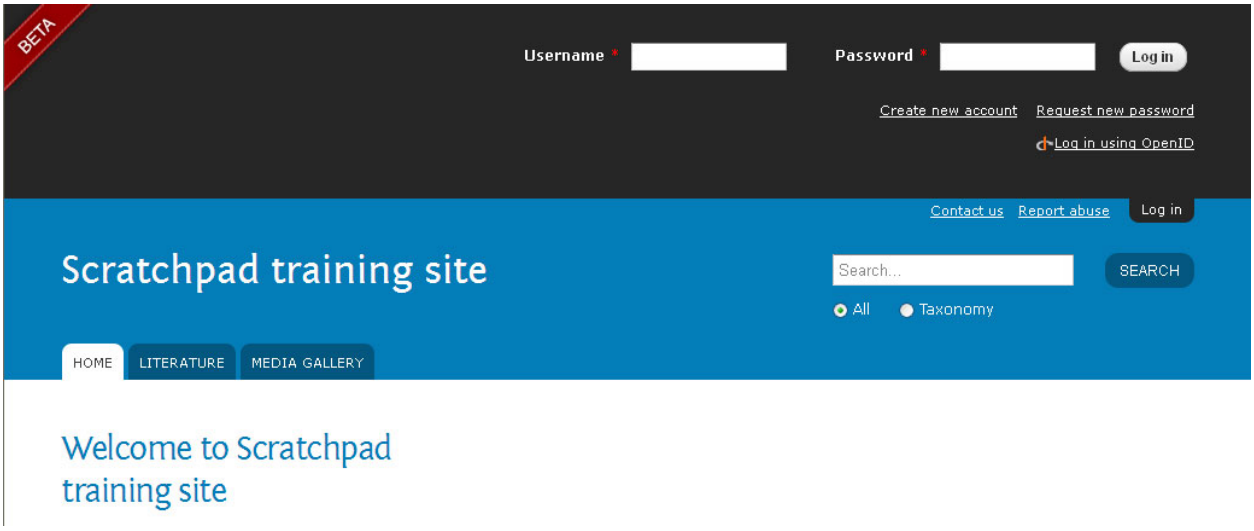
1.2 Logging in

1. Go to the URL of your training site.



2. The Log in button is in the upper right corner
3. Log in to your site with your username and password - the username for all training sites is:

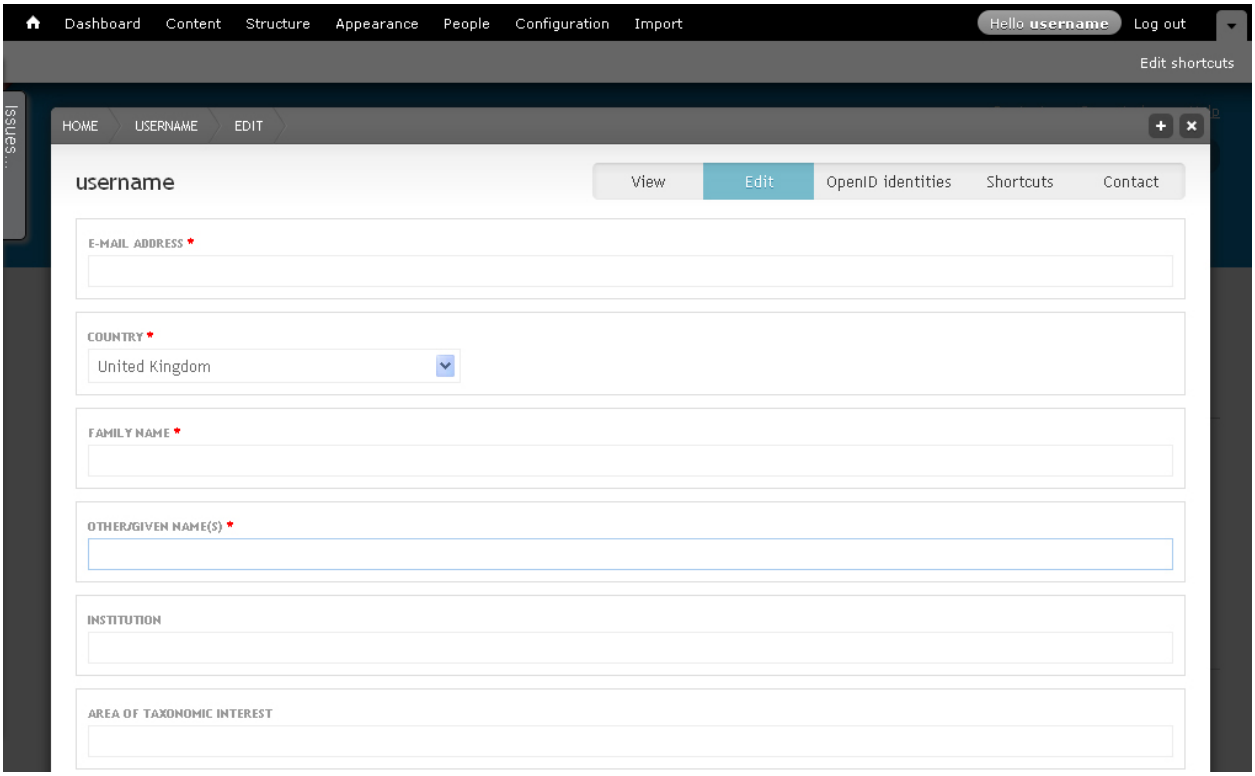
   Username: username
   Password: password



4. Accept the terms & conditions and save
5. Click on the "Hello username" link in the upper corner of the site to go to your user account
6. Click on the Edit tab to edit your account data. You will need to set:
   - Other/given name(s)
   - Family name

- Country
- Email address
- Password

7. Click save



1.3 Admin menu

The administration pages are accessed via the Admin menu at the top of the Scratchpad.

The Admin menu will be present once you have logged in to a site. The menu items you see will depend on your access permissions.

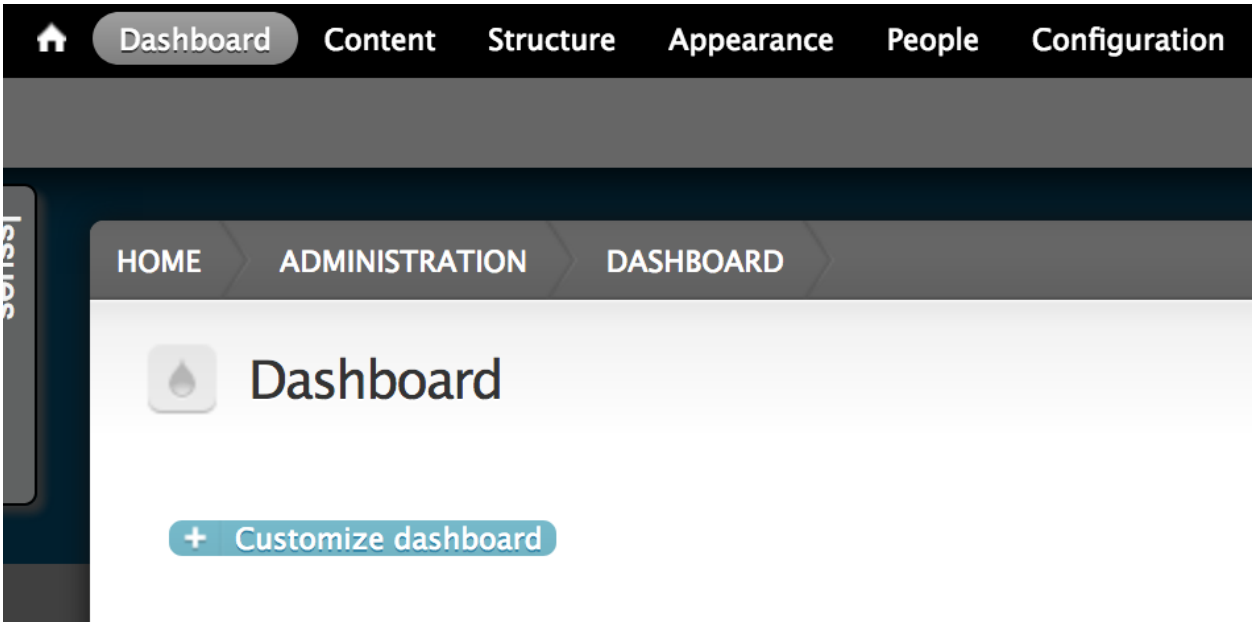
1. The first of the admin links is the Home icon that will always bring you back to the front page of the site
2. The Dashboard gives administrators a customizable overview of important site information. You can add and remove items from the dashboard (see *Customise dashboard*), or you can disable the dashboard completely
3. Under Content you can create and view the content on your site
4. Structure has links to administer site taxonomies, content types, tools and the various site layout options like blocks
5. Appearance is where you can edit the theme of your site

6. Under People you can administer the site's users, including adding or removing administration privileges
7. Configuration gives access to various advanced administration pages that you will need only rarely or not at all
8. The Import page is the place to go when you want to import any kind of data into your Scratchpad

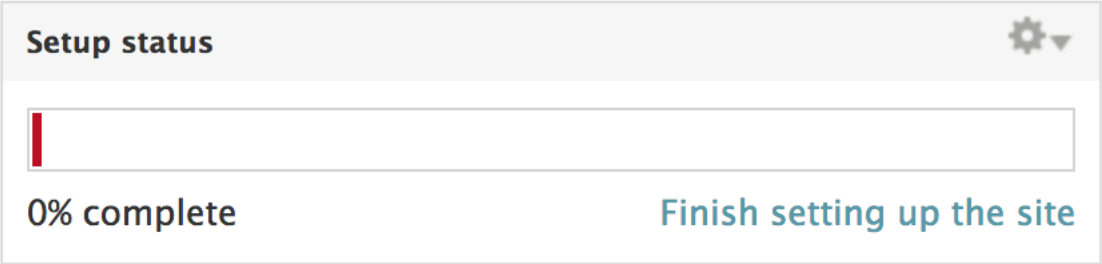
1.4 Site setup

This workflow leads you through step-by-step the basic set up of your new site.

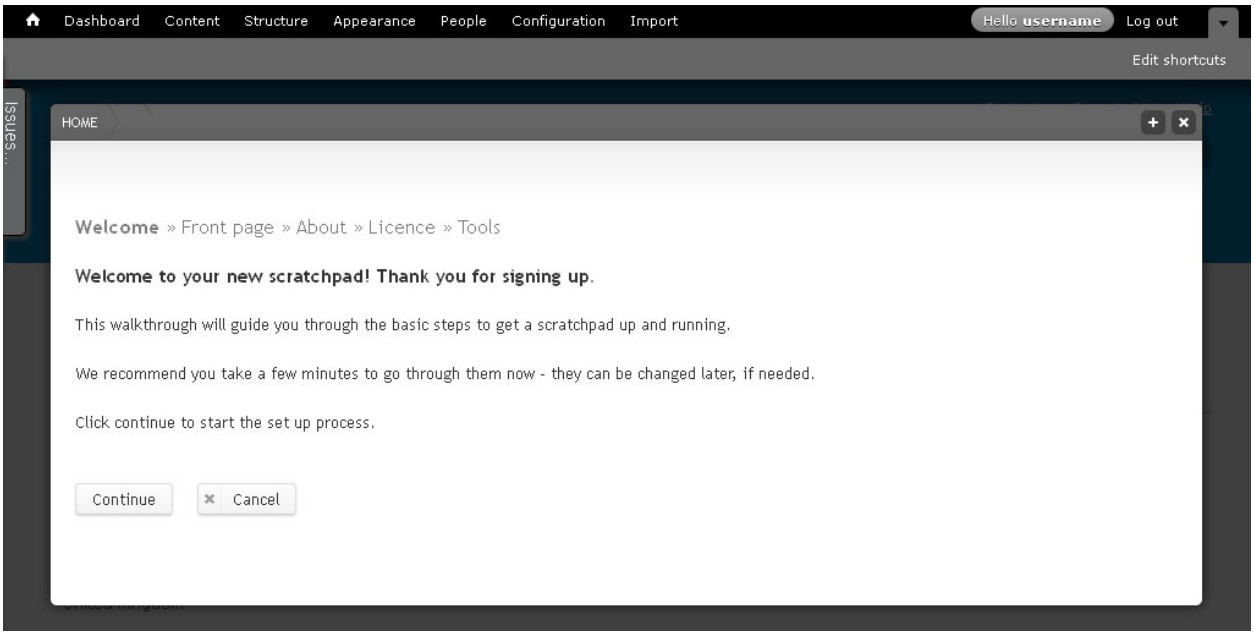
Click the *dashboard* link in the admin toolbar:



You can see your site's setup status is 0%. Click *Finish setting up the site*



Click the *Continue* button to start the set up workflow.



Step 1: Front page welcome message

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.

Enter a welcome message, and select *continue*.

Step 2: About your site

Enter text to create your sites About page.

Use the icons of the rich text editor to format your text or to add links or images

Step 3: Licence

Select a Creative Commons license to apply to the content of your site. 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.

Step 4: Category

Select the appropriate categories for your Scratchpad.

- Scope
- Ecoregion
- Geographical extent
- Research domain
- Taxonomic area

This information is used by the team to analyse Scratchpads usage.

Step 5: Tools

Tools turn on and off different features of Scratchpads. For this training course, don't change any of the tools, just save. We will activate and use some of the tools later in the course. The less tools activated the easier sites are to use for people with little Scratchpad knowledge.

Finish

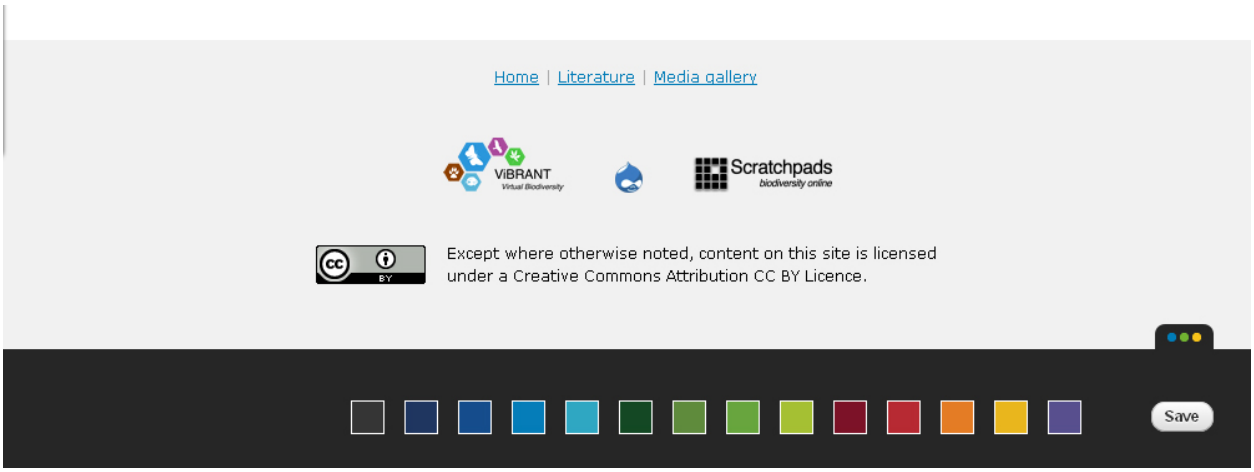
Click on the *Finish* button to complete the set up.

1.5 Theming

1.5.1 Colour scheme

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

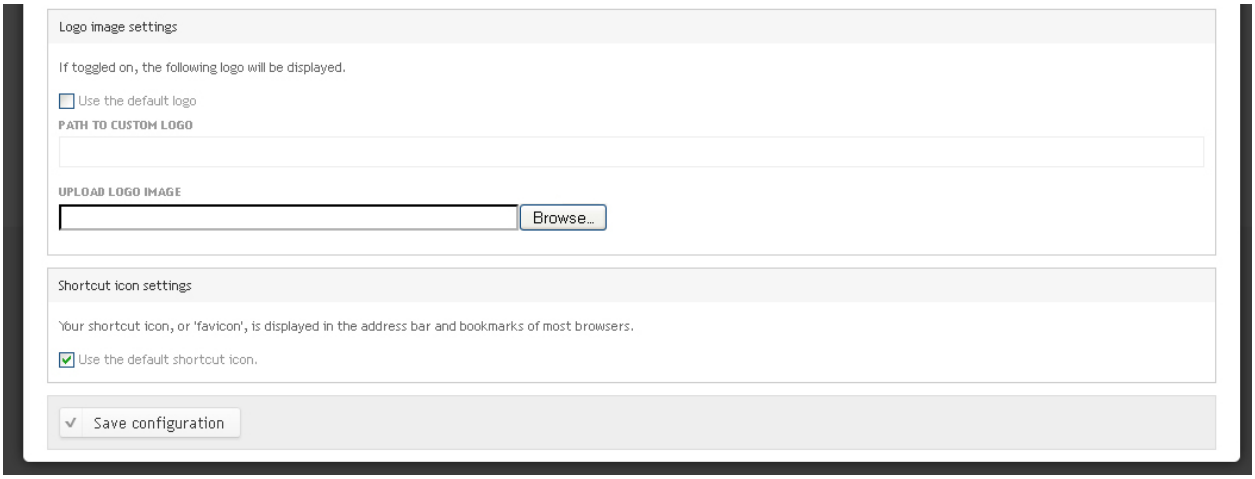
1. To change the theme colour, click on the *Colours* icon in the lower right corner of your Scratchpad, to reveal the colour palette options.
2. Select one of the colours.
3. Click *Save*.



1.5.2 Logo

Adding a logo

1. From the Admin menu go to Appearance > Settings
2. Disable *Use the default Shortcut icon*
3. Click Browse to find the desired logo in your computer
4. Click *Save*



What makes a good logo?

It's not easy to design a custom logo. Some guidelines to consider:

- Try to keep it relatively small so the header area is not too big. The header appears on every page and site content is displayed below the header.
- The dimensions of the default Scratchpad logo are 71x70 pixels. We do not recommend creating a logo over 130 pixels high.
- The ideal file format is Portable Network Graphics (PNG) as it supports transparency, something that JPEGs do not. If your header image/logo does not require transparent areas then a JPEG is fine to use.
- We create logos as vector images then save them as raster images.

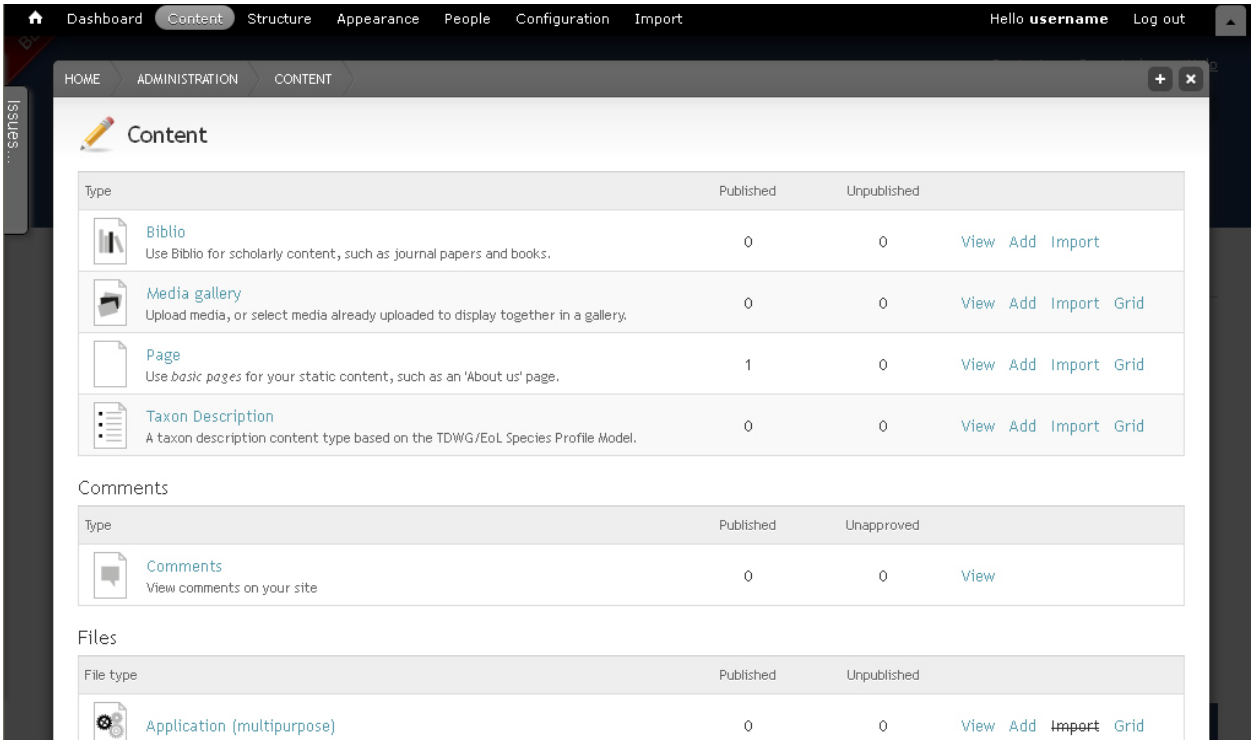
1.6 Pages

In Scratchpads you can create custom pages to present content in a static way.

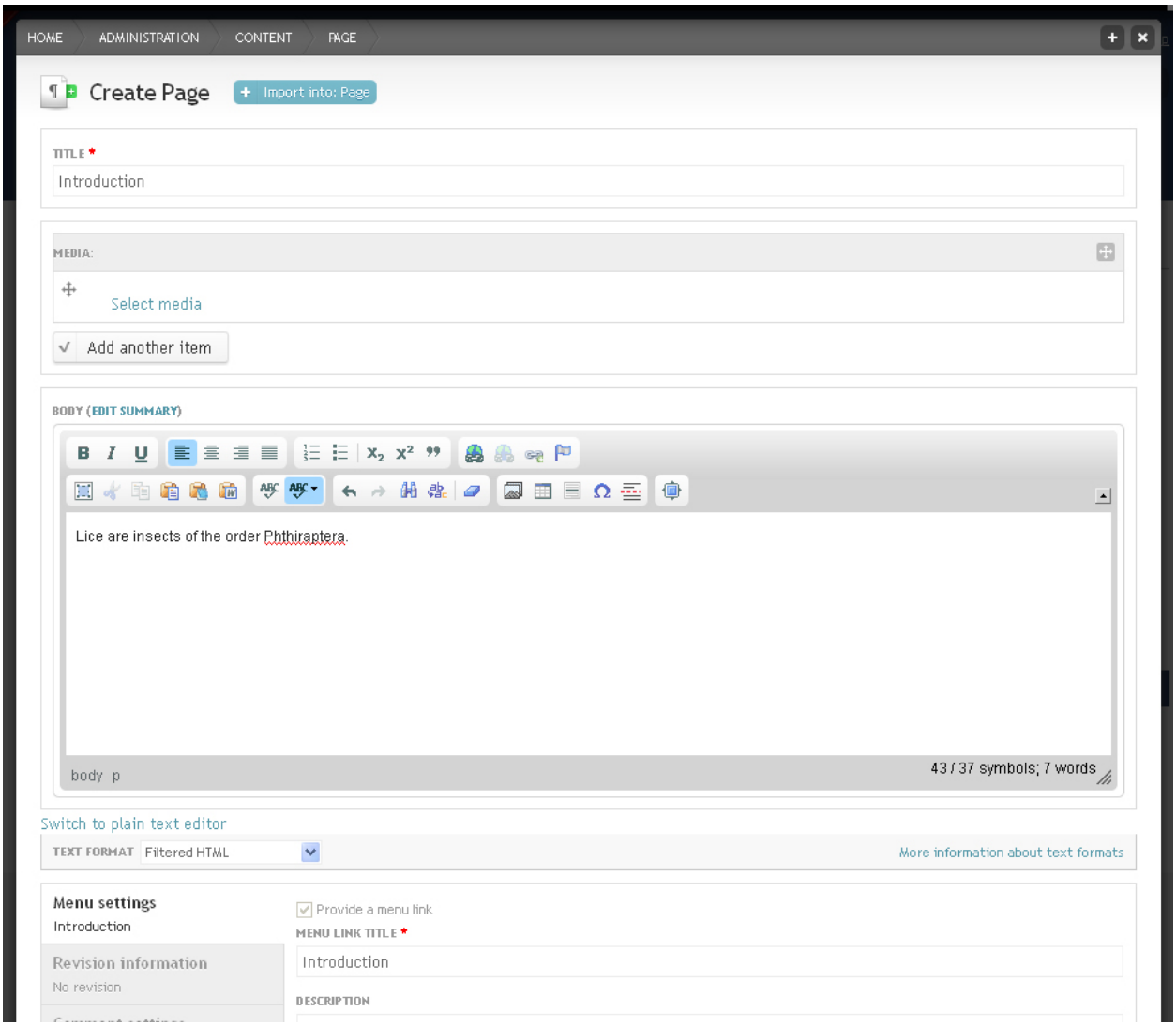
You can embed text, images or other content.

1.6.1 Adding a page

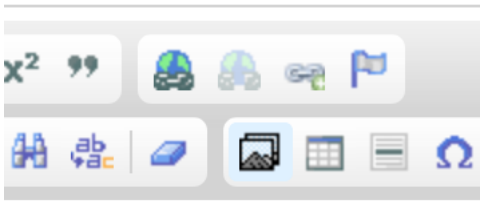
1. From the Admin menu go to *Content*



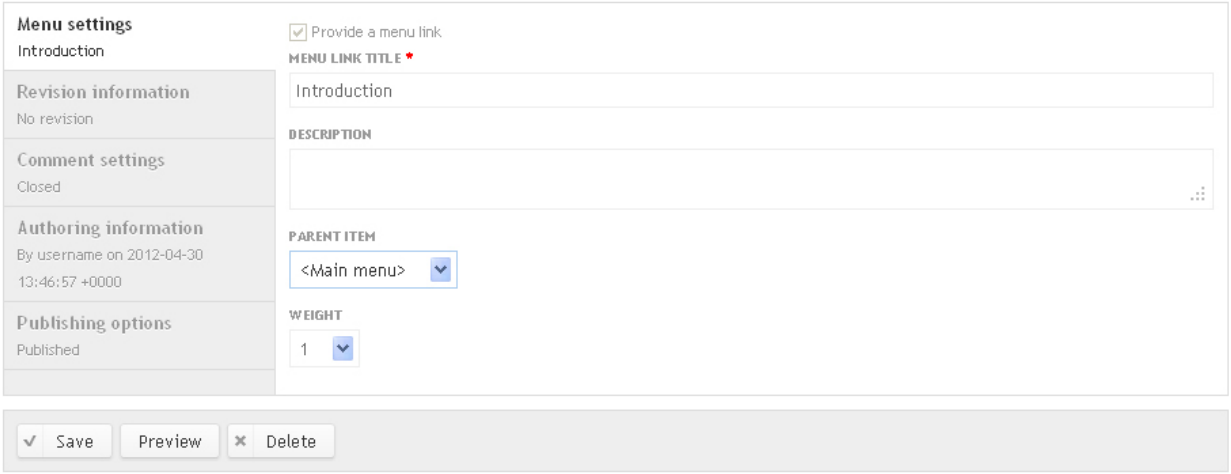
2. Click *Add* next to *Page*



3. Enter a *TITLE*, e.g. "Introduction", and some *BODY* text. The *BODY* text is the main content of the page. If you click *Edit summary* you can enter text to be used as a summary for the page content, displayed on search results or news pages.
4. Use the *MEDIA* field to link media (images, audio or video) to your page. These items will appear as links beneath the text of your page
5. To add images to your text, you need to add them using the *Add media* icon in the *BODY* field



6. In *MENU SETTINGS* select where you want the page to be placed by choosing the appropriate *PARENT ITEM*.

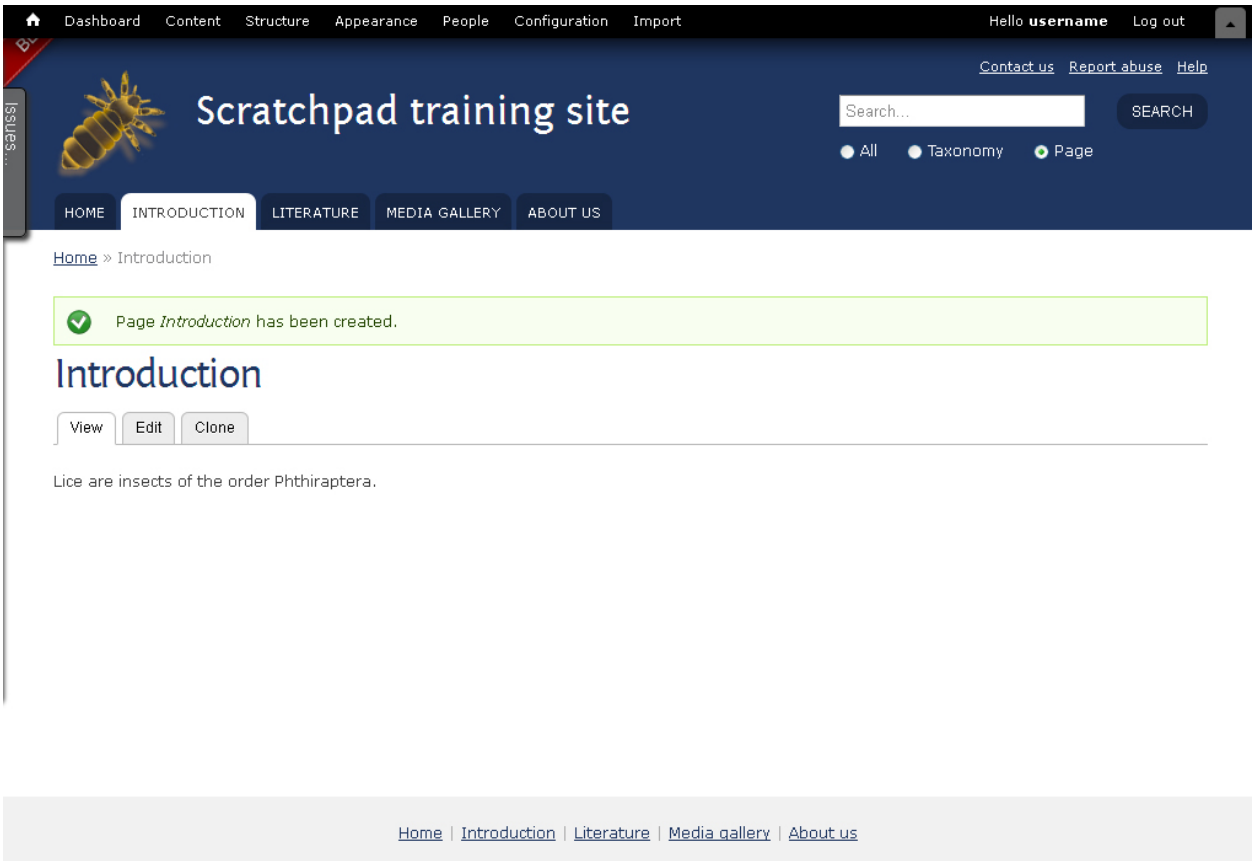


By default, a page will be set to Main menu (see above). A *MENU LINK TITLE* is required for each page. By default, the page title is used. You may want to replace the menu link if the page title is very long

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.

7. Click the *Save* button at the bottom left



1.6.2 Editing page

To edit an existing page you can either click the edit tab on the page, or find the page in the *admin>content>page* section.

1. Edit content on the page by clicking the *Edit* tab
2. 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.
3. Click *Save*

1.6.3 Cloning a page

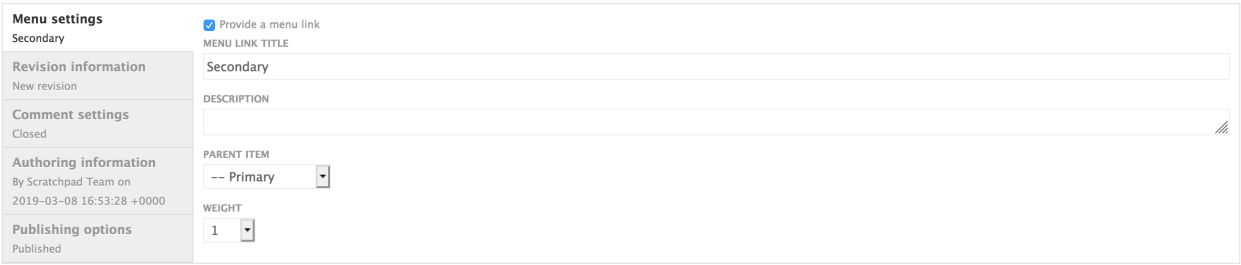
For cases where there are only slight differences between nodes you can create a duplicate:

1. Click on the *Clone* tab.
2. Change the *Title* of the page and some of the text
3. Change the menu link

1.6.4 Hierarchical pages

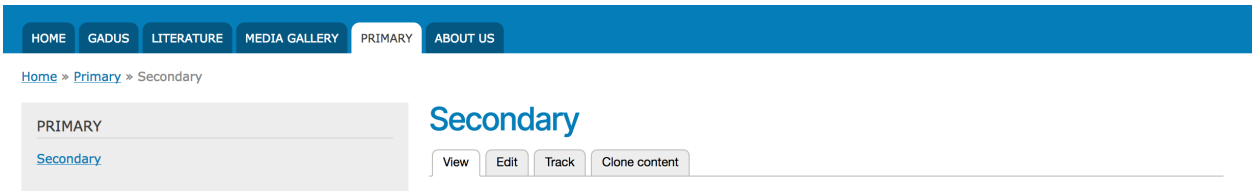
Often, it's useful to create a hierarchical structure of pages.

1. Create a new page
2. In *MENU SETTINGS* select a previously created page as the *PARENT ITEM*.



3. Click *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.



1.7 Adding a biological classification

Introduction

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

1. Click on *Structure* in the *Admin menu* and click on *Taxonomy* near the bottom

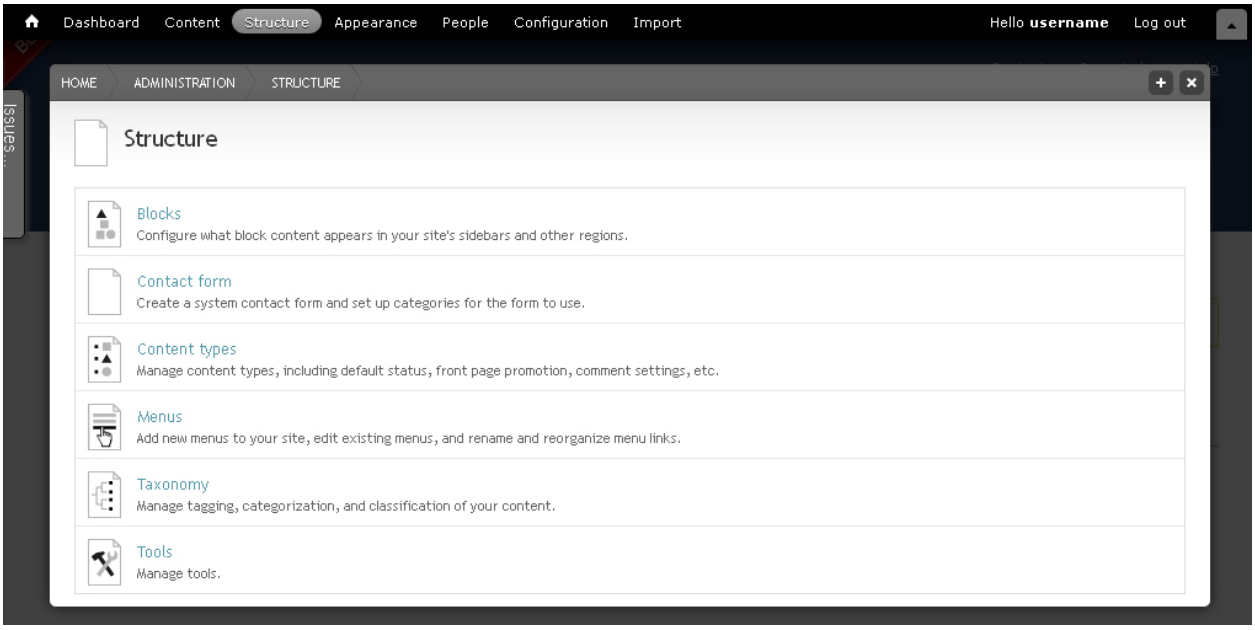


Fig. 1: "Structure" admin page, listing the menu options: Blocks; Contact form; Content types; Menus; Taxonomy; and Tools

2. Click on the *Add vocabulary* link
3. Enter the vocabulary *Name*.
4. Add a vocabulary *Description*.
5. Select which kind of biological classification you are creating ("Animal" in our example)
6. Click *Save*

1.7.1 Adding terms

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 Scratchpads Classification Service (see *Importing a classification*), or by creating and importing your own classification from Excel (see *Importing classification from Excel*). 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 (see *Editing classification*).

1.7.2 Troubleshooting

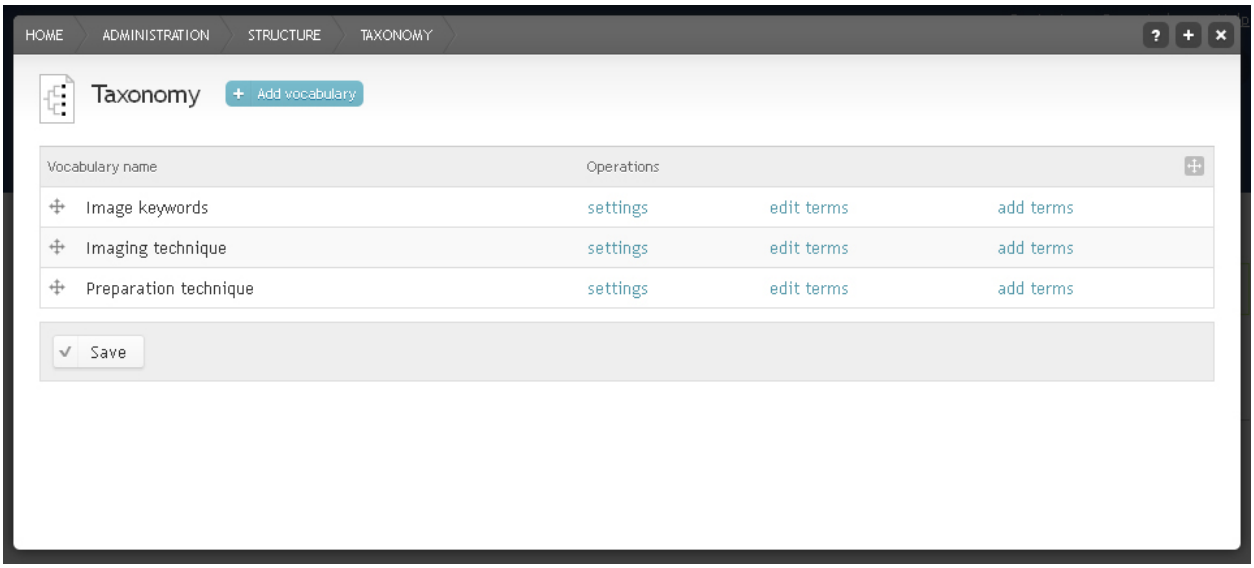


Fig. 2: Taxonomy page showing "Add vocabulary" button near the page title

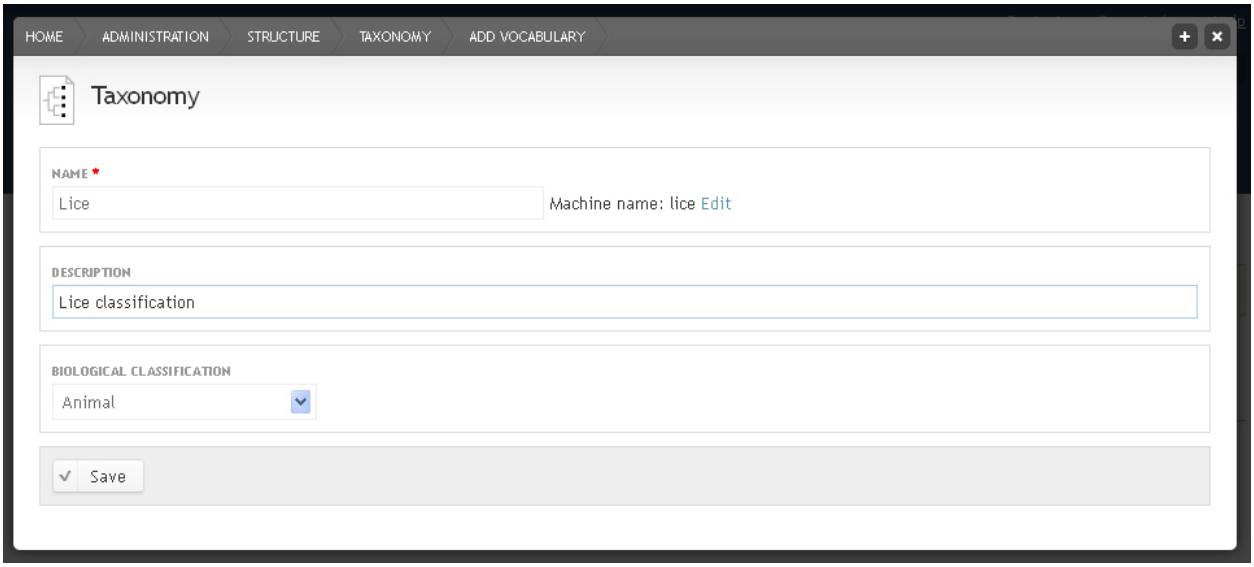


Fig. 3: Add vocabulary form showing name, description and biological classification fields

Missing tab after creating classification

If after creating a classification and adding terms to it a tab does not appear for it in the main tab bar try clearing the caches:

1. Go to *Admin* > *config* > *development* > *clearcache*
3. Click *Clear all caches* - this will take a number of seconds to complete (likely more than 30 seconds)

1.8 Importing a classification

Scratchpads provides a service to import classifications from Catalogue of Life.

The names provided by this service are currently a little out of date, from 2014 and 2015, but will be updated soon.

1. From the Admin Menu go to *Import*
2. From the drop-down list select *Taxonomy* > *Scratchpads Classification Service*
3. Select the Taxonomy
4. Enter the root term (the highest taxon for which all children will be imported) of your classification (e.g. "Pediculus" or "Pinus").
5. Choose which Catalogue of Life name list to use (we'd recommend the most recent), and select *Import*. This will import the complete classification into the Scratchpad (and may take a few minutes, depending on the number of names to import).

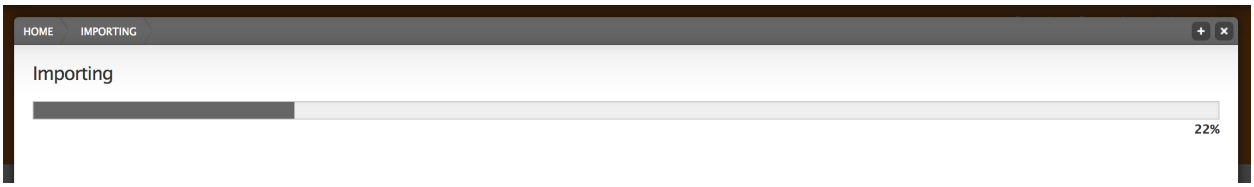


Fig. 4: Classification import progress bar

When the import is complete, the overlay will report the number of terms created.

1.8.1 Viewing classification

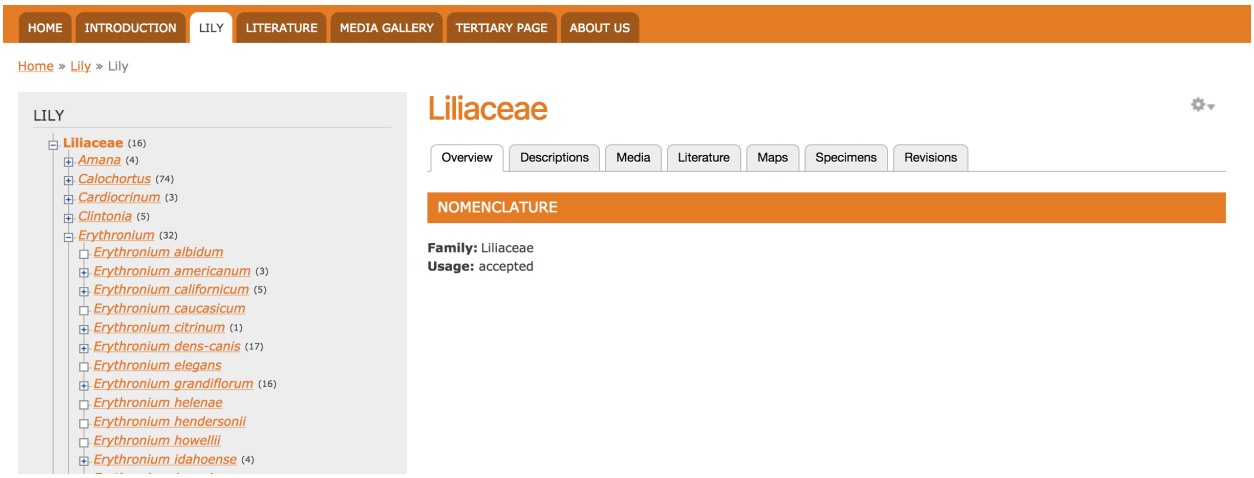
To view your new classification and the taxon pages, close the overlay and go to the new tab with the classification's name in the *Main menu* - see *Viewing a classification*.

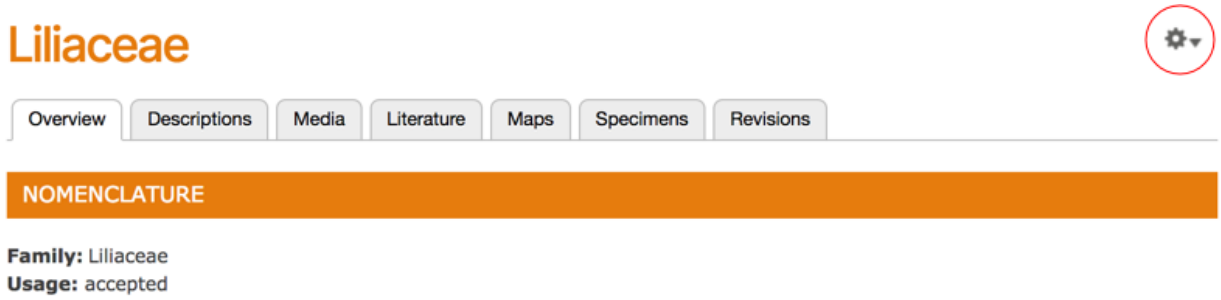
1.9 Viewing a classification

To view your new 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.

On the top right, click on the cog wheel icon next to the taxonomic name header to open the taxonomic editor - see *Editing classification*.





1.10 Editing classification

You can open the taxonomy editor either from clicking the cog wheel icon next to the taxonomic name header of a taxon page (see *Viewing a classification*), or from the *Admin menu*:

1. From the *Admin Menu* go to *Structure* > *Taxonomies*
2. Click *Edit terms* next to the biological classification you wish to edit.

1.10.1 Taxonomy 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.

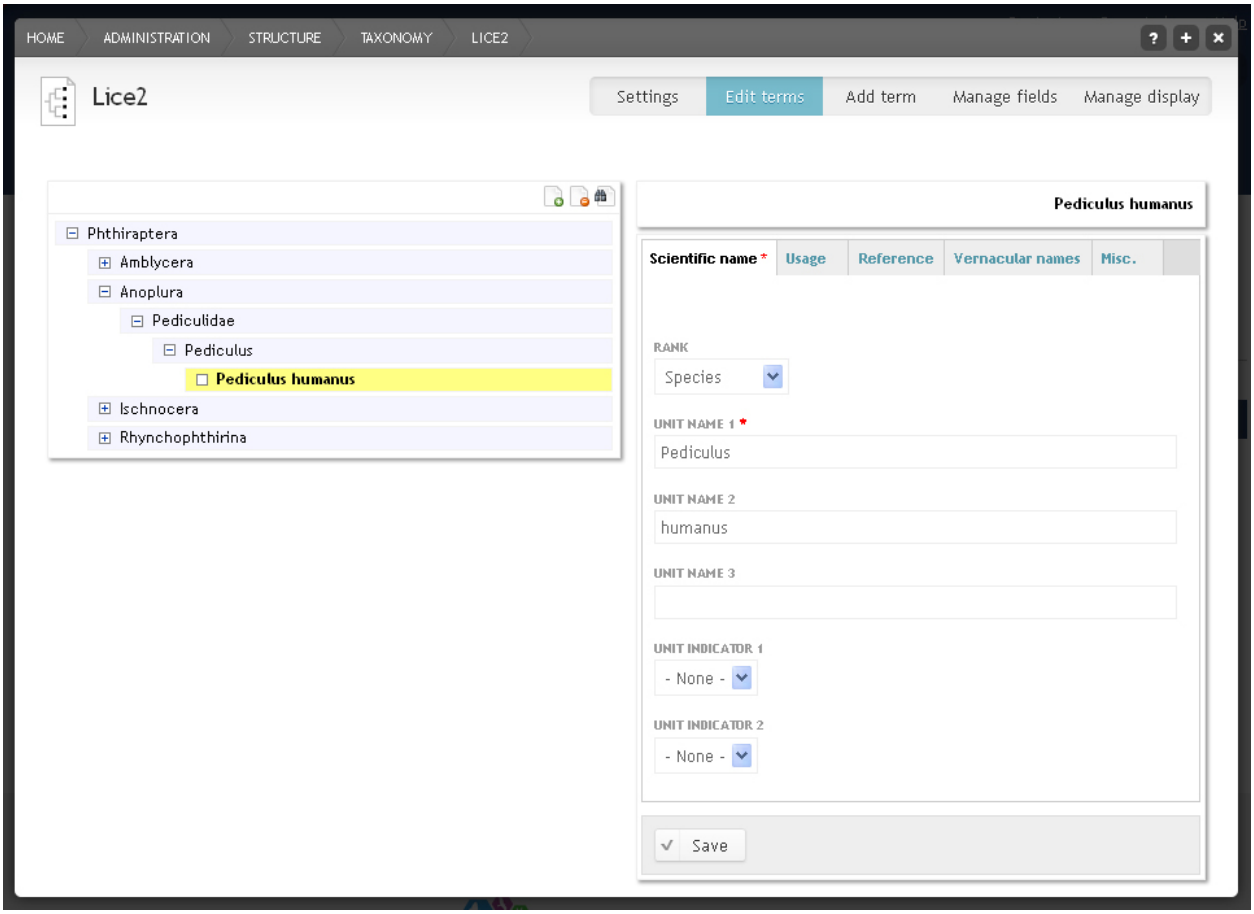
Selecting a term

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.

Editing term form

1. When you select a term to edit, the term form opens on the right hand side

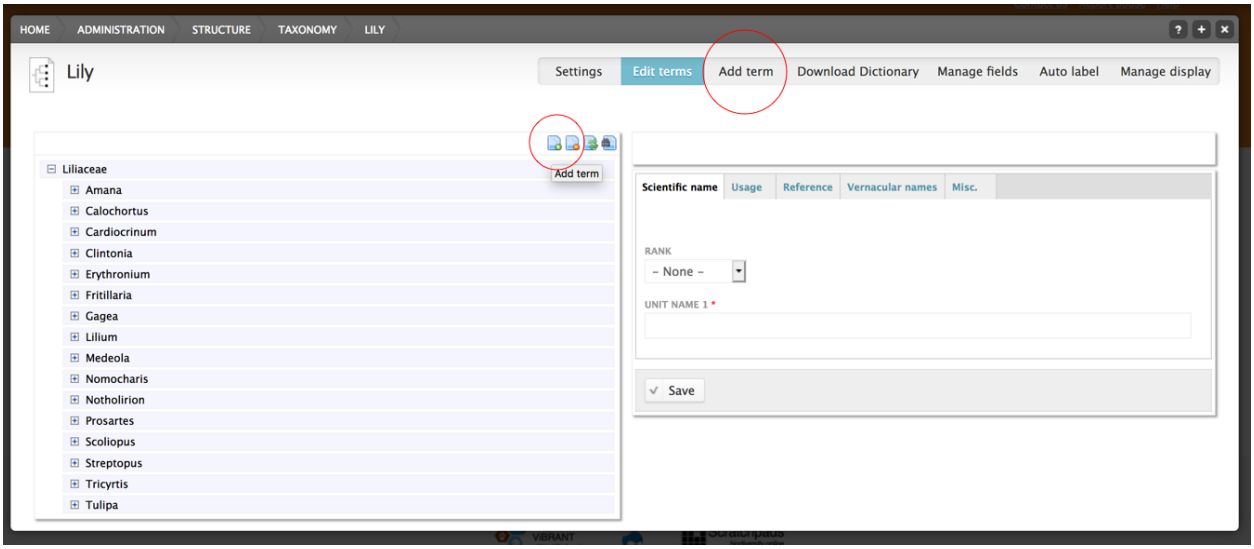

HOME
ADMINISTRATION
STRUCTURE
TAXONOMY
LICE2
Lice2
Settings
Edit terms
Add term
Manage fields
Manage display
Phthiraptera
Amblycera
Anoplura
Pediculidae
Pediculus
Pediculus humanus
Ischnocera
Rhynchophthirina
Pediculus humanus
Scientific name *
Usage
Reference
Vernacular names
Misc.
RANK
Species
UNIT NAME 1 *
Pediculus
UNIT NAME 2
humanus
UNIT NAME 3
UNIT INDICATOR 1
- None -
UNIT INDICATOR 2
- None -
Save

2. Make changes and Click *Save*

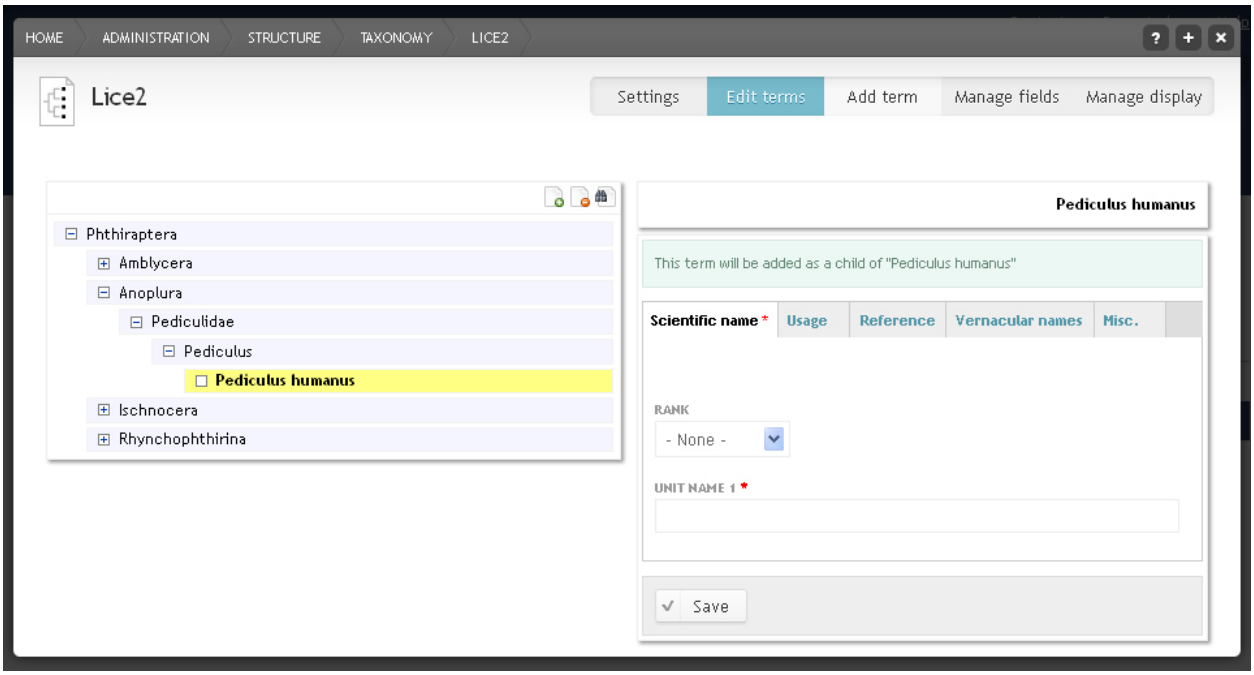
Scratchpad biological classification fields conform to the *Integrated Taxonomic Information System (ITIS)* standard. For more information on these fields see *Itis standard fields*.

Adding a term

Add a term by either clicking on the *Add term* icon in the upper right corner of the tree, or on the *Add term* tab above the right hand Form side.

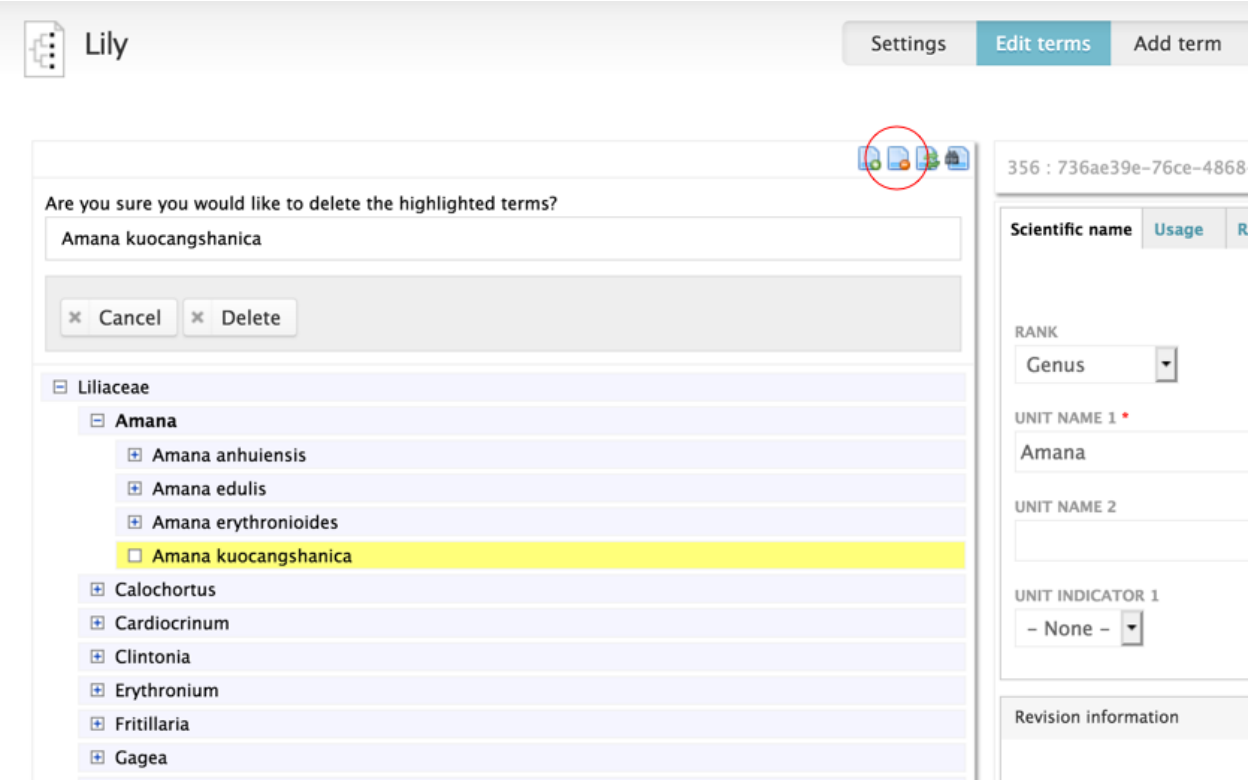


The new term will be added as child of the selected term. If no term was selected the new term is added to the root of the classification.



Delete a term

Select a term to delete, and click the *Delete term* icon in the upper right corner of the Tree side of the taxonomic editor. Scratchpads will ask you to confirm the deletion before proceeding.



1.11 Itis standard fields

By default all Scratchpad taxonomies have three basic fields: the term name, parent and description. This is not really enough when dealing with biological classifications. We have therefore developed a special way to deal with biological classifications that follows the standards used by the *Integrated Taxonomic Information System (ITIS)* and is compatible with other initiatives.

The fields we use for biological classifications are:

Standard Scratchpad fields:

- **Term name**: A combination of the different unit names and indicators.
- **Parent term name**: An ITIS term denoting the taxon that is the next highest level from the subject valid or accepted taxon. The parent of a species is usually a genus; the parent of a genus is usually a family, and so on. This parent-child linkage between records is the basis for the classification hierarchy in ITIS.
- **Term description**: The term description field is usually not used for biological classifications.
- **GUID**: The global unique identifier for the term name. GUIDs can be used to compare/synchronise different databases. Adding a GUID is not required, you only need it if your names were generated from an established database and you want to be able to update your names 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 to start counting from "1". Better is a combination like "Species2000-1"

- **Parent GUID**: The global unique identifier for the parent term name. Adding a Parent GUID is not required.

ITIS fields:

- **Associated accepted_name**: The scientific name of the valid or accepted taxon identified as the currently accepted name used for a given invalid or not accepted name. Each name that is in synonymy (junior synonyms, obsolete combinations, etc.) must be connected to one accepted or valid name.
- **Authors**: The author(s) associated with the name of a taxon. This can include the year of publication and brackets, e.g. "(Quoy and Gaimard, 1832)".
- **Page number**: The page number the taxon was described on in the protologue. This field is not part of the ITIS standard.
- **Rank**: The label associated with the specific level of a taxonomic hierarchy, e.g. "Family", "Genus" or "Species". For values check ITIS or the taxonomic editor for an existing classification on your site. Note that the spelling and capitalisation of the ranks in your import file must match the ranks in the Scratchpad!
- **Unacceptability_reason**: An explanation regarding why a given scientific name is judged to be invalid or not accepted. Unacceptability reasons vary among kingdoms. For values check ITIS or the taxonomic editor for an existing classification on your site. Note that the spelling and capitalisation of the reasons in your import file must match those in the Scratchpad!
- **Unit indicator 1**: Indicator of an occurrence of a plant hybrid at the generic level. The only value allowed is "X".
- **Unit name 1**: The singular or first part of a scientifically accepted label for an occurrence of Taxonomic Units. For uninomials (1-part names like family or genus names) this will be the only name field entered. For binomials/polynomials, this field will be used for the first part of the name (the genus name). The names in this position require the initial letter to be capitalized.
- **Unit indicator 2**: A category indicator positioned between the first and second parts of a binomial/polynomial taxonomic name. The only value allowed is "X".
- **Unit name 2**: The second part of a scientifically accepted label for a binomial/polynomial occurrence of Taxonomic Units (the species epithet).
- **Unit indicator 3**: A category indicator located within a polynomial taxonomic name. Allowed values are: "ssp." (plants and fungi), "subsp." (animals and monerans), "var.", "subvar.", "f.", "subf.", and "X".
- Unit name 3: The third portion of a scientifically accepted label for a polynomial occurrence of Taxonomic Units (e.g. subspecies name).
- **Unit indicator 4**: Same as unit indicator3.
- **Unit name 4**: The fourth part of a scientifically accepted label for a polynomial occurrence of Taxonomic Units.
- **Usage**: Current standing of an occurrence of Taxonomic Units. Allowed values are: "accepted" (plants and fungi), "not accepted" (plants and fungi), "valid" (animals and monerans), and "invalid" (animals and monerans).
- **Vernacular names**: Enter vernacular names for this taxon, comma-separated. This field is not part of the ITIS standard.

1.12 Importing classification from Excel

Taxonomic terms can be imported directly into a existing vocabulary through a pre-populated template excel file. This can be very helpful especially when large volume of terms has to be imported or when the imported terms are already in a structured (or semi-structured) format (e.g. an MS Excel file, an MS Access database).

1.12.1 Create the vocabulary

Skip this section if you already have a taxonomy you wish to update

1. From the Admin menu go to *Structure* > *Taxonomy*
2. Click + *Add vocabulary*
3. Provide the Name of your new classification
4. Select if the classification is Biological or non-biological. This is a very important step
5. Click *Save*

1.12.2 Downloading the template file

1. From the *Admin menu* select *Import*
2. Select *Taxonomy: Excel file import*
3. Select a vocabulary.
4. Download the Excel template.
   - Select the first template file if you wish to replace all contents of an existing classification.
   - Select the second template file if you wish to update (correct, add) terms in a existing classification

1.12.3 Editing the template file

Complete the columns as follows:

Term Name - Required field

Provide the full term without the authority. e.g. *Thymus* or *Thymus longicaulis* or *Thymus longicaulis subsp. longicaulis* Do not italicize.

Always start with the higher taxa of your classification first

Parent Term Name

Provide the term name of the immediate hierarchical parent in your classification. Provide the name as entered in the *Term Name* field

Term description

Provide some basic description for the term. This field should not be confused with the taxon description that can be entered in detail from the Taxon description content type

GUID

Provide a unique and at least 10 character long alphanumeric identifier for the term. This identifier will be used throughout Scratchpads to identify this term. If left empty the system will auto-generate one once the file is uploaded

Parent GUID

Provide the GUID of the parent term. This can be left empty if you have already provided the *Parent Term Name* or if the taxon is the highest in the hierarchy.

Associated accepted name (Name)

Provide the name of the term that is the currently accepted name if the taxon is not accepted. Should be left empty if the column *Associated accepted name (TID)* or *Associated accepted name (GUID)* is filled.

Associated accepted name (TID)

Provide the TID number of the term that is the currently accepted name if the taxon is not accepted. Should be left empty if the column *Associated accepted name (name)* or *Associated accepted name (GUID)* is filled.

Associated accepted name (GUID)

Provide the GUID number of the term that is the currently accepted name if the taxon is not accepted. Should

1.12.4 Importing the template file

Once you have made the desired changes and additions to the template file, you can import it back into your Scratchpad.

Select *Browse*, locate the file, and select *Import*.

When the import is complete, the overlay will report the number of terms created.

To view your new classification and the taxon pages, close the overlay and go to the new tab with the classification's name in the *Main menu* - see *Viewing a classification*.

1.13 Deleting classification

From the Admin menu go to Structure > Taxonomy

1. Select Settings next to the taxonomy you wish to delete
2. Click Delete at the bottom.

This will delete the vocabulary as well as all the terms in this vocabulary.

1.14 Integrating external data

Scratchpads can integrate data from many important data providers on its taxon pages

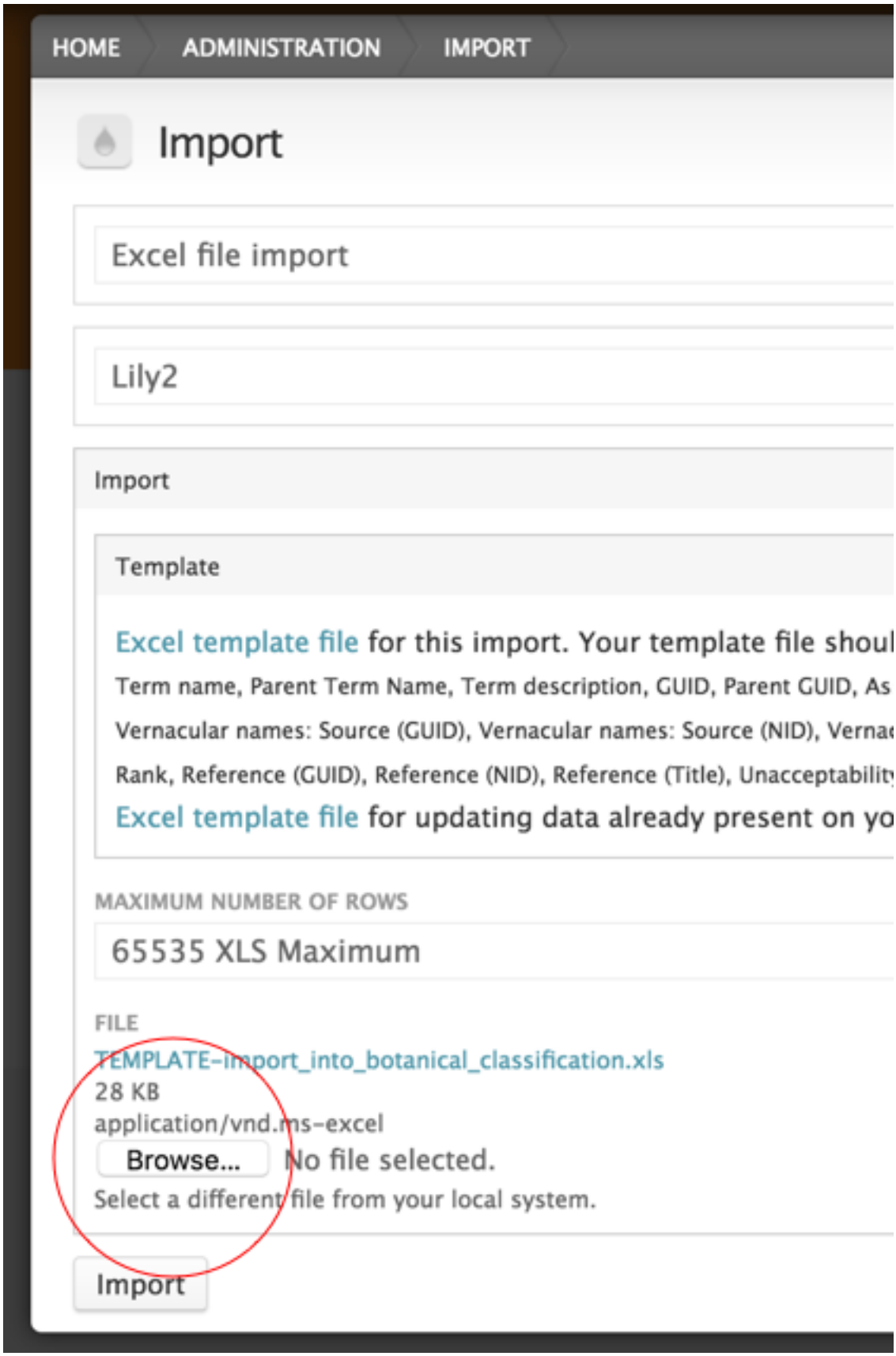
1.14.1 IUCN

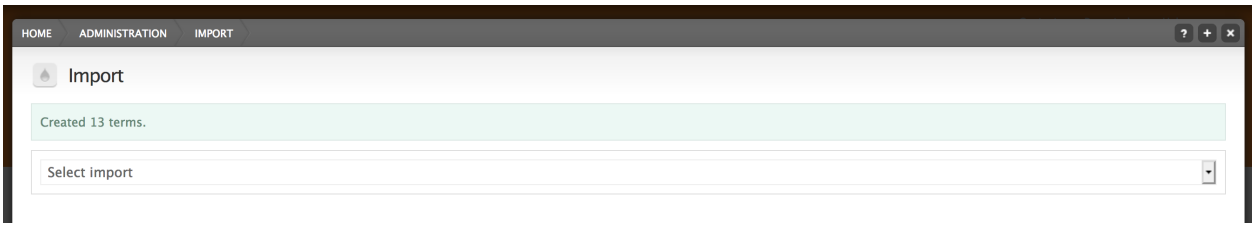
Enabling the widget

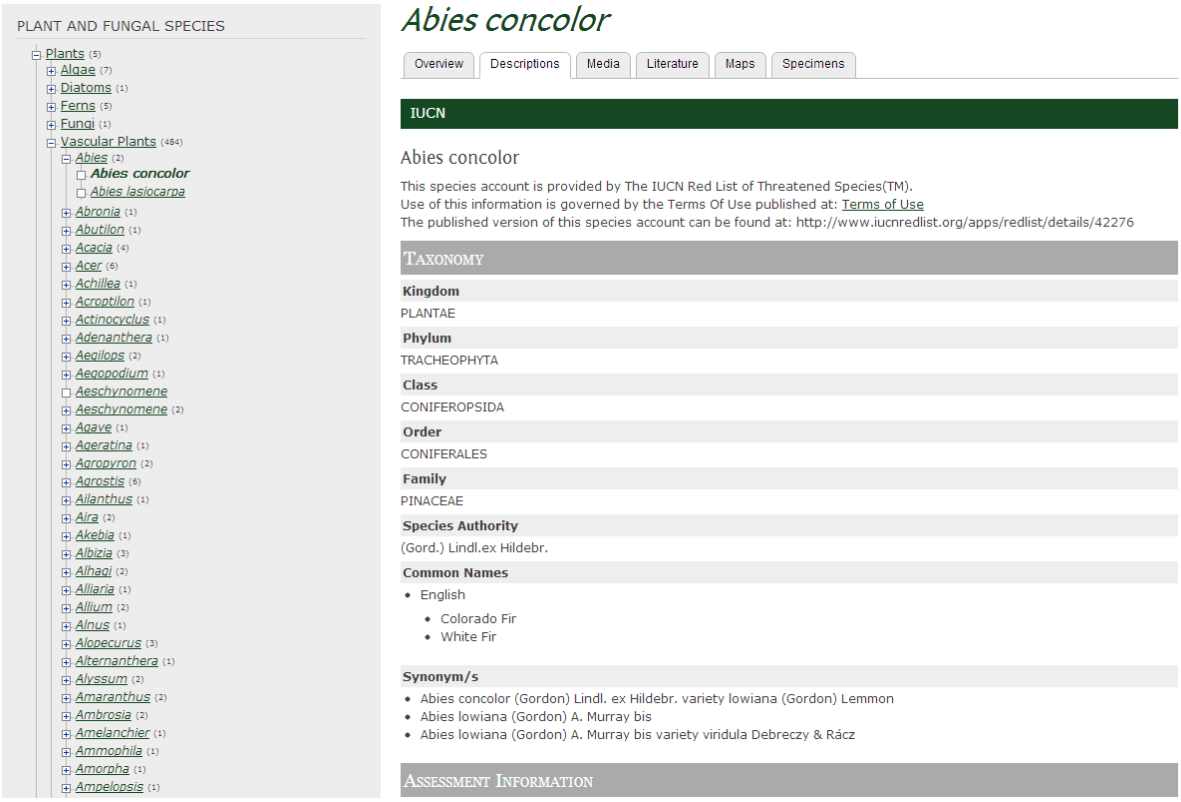
1. From the administration menu bar got to *Structure* > *Tools*
2. Find the Widgets section
3. Click *on* the switch next to IUCN Widget to enable it (ON)
4. Click *Save*

Once enabled, the widget will appear as a new section called IUCN in the Descriptions tab of your taxonomy viewer.

When no data are available from IUCN service for a taxon the following message will appear: "The IUCN does not hold any information for [taxon name]"


HOME
ADMINISTRATION
IMPORT
Import
Excel file import
Lily2
Import
Template
Excel template file for this import. Your template file shoul
Term name, Parent Term Name, Term description, GUID, Parent GUID, As
Vernacular names: Source (GUID), Vernacular names: Source (NID), Vernac
Rank, Reference (GUID), Reference (NID), Reference (Title), Unacceptabilit
Excel template file for updating data already present on yo
MAXIMUM NUMBER OF ROWS
65535 XLS Maximum
FILE
TEMPLATE-import_into_botanical_classification.xls
28 KB
application/vnd.ms-excel
Browse...
No file selected.
Select a different file from your local system.
Import


HOME
ADMINISTRATION
IMPORT
Import
Created 13 terms.
Select import


PLANT AND FUNGAL SPECIES
Plants (5)
Algae (7)
Diatoms (1)
Ferns (5)
Fungi (1)
Vascular Plants (484)
Abies (2)
Abies concolor
Abies lasiocarpa
Abronia (1)
Abutilon (1)
Acacia (4)
Acer (6)
Achillea (1)
Acroptilon (1)
Actinocyclus (1)
Adenanthera (1)
Aegilops (2)
Aegopodium (1)
Aeschynomene
Aeschynomene (2)
Agave (1)
Ageratina (1)
Agropyron (2)
Agrostis (6)
Ailanthus (1)
Aira (2)
Akebia (1)
Albizia (3)
Alhagi (2)
Alliaria (1)
Allium (2)
Alnus (1)
Alopecurus (3)
Alternanthera (1)
Alyssum (2)
Amaranthus (2)
Ambrosia (2)
Amelanchier (1)
Ammophila (1)
Amorpha (1)
Ampelopsis (1)
Abies concolor
Overview
Descriptions
Media
Literature
Maps
Specimens
IUCN
Abies concolor
This species account is provided by The IUCN Red List of Threatened Species(TM).
Use of this information is governed by the Terms Of Use published at: Terms of Use
The published version of this species account can be found at: http://www.iucnredlist.org/apps/redlist/details/42276
TAXONOMY
Kingdom
PLANTAE
Phylum
TRACHEOPHYTA
Class
CONIFEROPSIDA
Order
CONIFERALES
Family
PINACEAE
Species Authority
(Gord.) Lindl.ex Hildebr.
Common Names
English
Colorado Fir
White Fir
Synonym/s
Abies concolor (Gordon) Lindl. ex Hildebr. variety lowiana (Gordon) Lemmon
Abies lowiana (Gordon) A. Murray bis
Abies lowiana (Gordon) A. Murray bis variety viridula Debreczy & Rácz
ASSESSMENT INFORMATION

1.14.2 NCBI

Enabling the widget

1. From the administration menu bar got to *Structure* > *Tools*
2. Find the Widgets section
3. Click *on* the switch next to *NCBI Widget* to enable it (ON)
4. Click *Save*

Accessing widget results

Once enabled, the widget will be visible as a new section called NCBI in the Description tab of your taxonomy viewer.

1. A table will provide results associated with a taxon from all NCBI's databases; including Nucleotides and Proteins.
2. Click on the Subtree or Direct links number to directly access the NCBI data
2. Click on External links to expand it. These links are taxon related links to other third party resources, as provided by the NCBI API.

NCBI

Database name	Subtree links	Direct links
Nucleotide	19	12
Protein	7	-
PubMed Central	2	2
Taxonomy	2	1

External links Click to expand

- CatofLife: search Catalog of Life
- encylife: Thymus praecox Opiz
- ePIC: Thymus praecox
- GBIF: search GBIF
- iPhylo: Wikipedia
- IPNI: Thymus praecox
- ITIS: Thymus praecox Opiz
- PLANTS: Thymus praecox
- TROPICOS: search W3TROPICOS

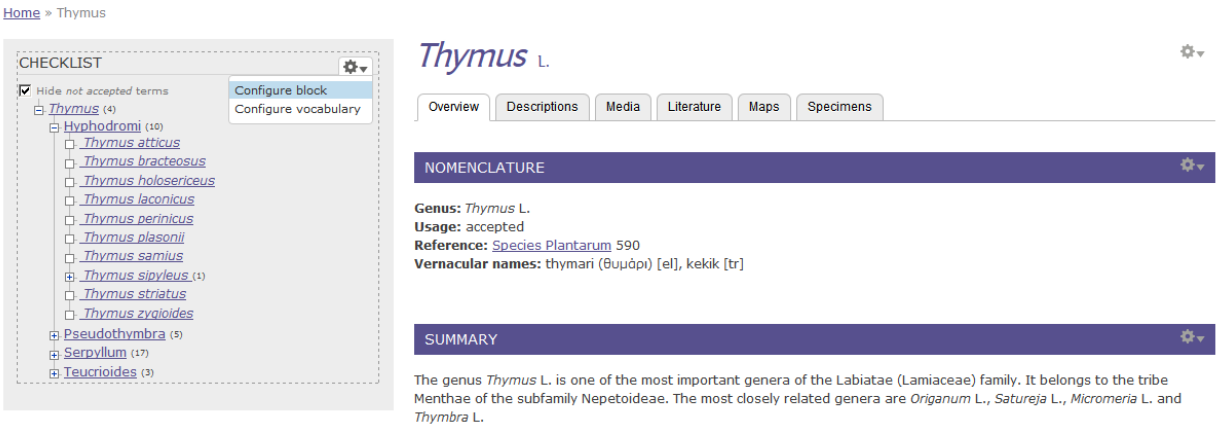
When no data are returned from BHL this section will not be visible.

1.15 Filtering taxonomic terms

You can use filters to temporarily 'clean' a classification from unwanted terms. Some biological classifications include a lot of synonyms, often multiple times the volume of accepted names.

You may want to allow for users to temporarily browse only through the accepted terms of a taxonomy. You can also allow the exclusion of terms based on the rank they belong or the unacceptability reason.

1. While on the desired classification browsing page, click on the cog on the left top corner of the taxonomic tree (left side bar)
2. Select *Configure block*



3. Adjust the settings under the *Toggle visibility of terms* section as follows:
   - Select the *Field to match against*. E.g. select *usage* if you want to add a filter to exclude all not accepted terms
   - Select the *Values to hide*. E.g. select *not accepted* if you want to add a filter to exclude all not accepted terms
4. Click *Save block*

1.15.1 Enable or disable the filter

1. Go to the page with the classification
2. On the top of the block you will see a tick-box stating *Hide xxxxxx terms*
3. Select to enable or deselect to disable this filter

1.16 Locations and specimens

Specimen data in a Scratchpad conform to the *Darwin Core* (version 1.2.1) format recommended by *TDWG* (the Taxonomic Databases working group) and *GBIF*.

They are separated into two content types: location and specimen, which allows you to connect different specimens at the same location.

1.16.1 Adding a location

1. From the Admin menu go to *Content*
2. Click *Add* next to *Location*

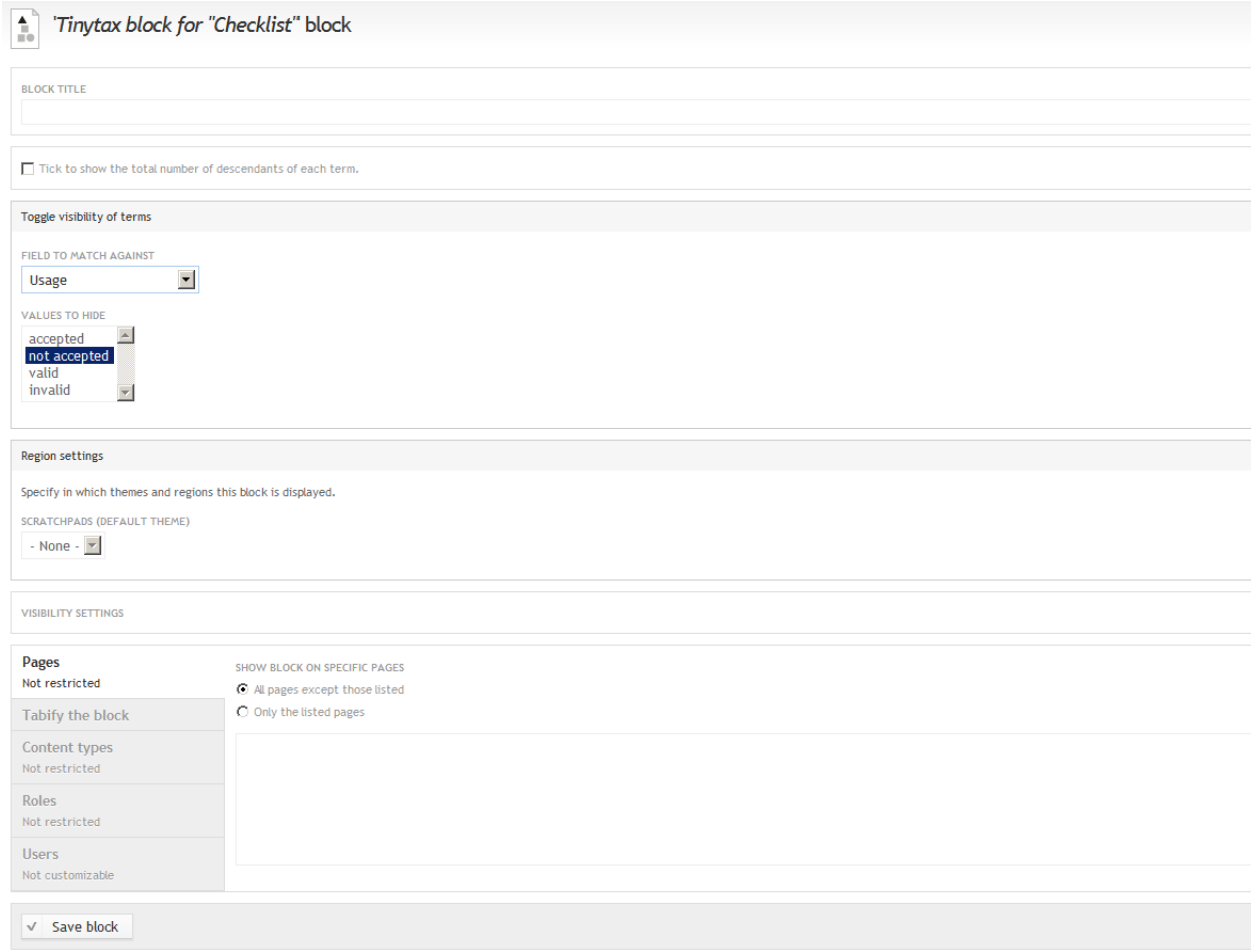
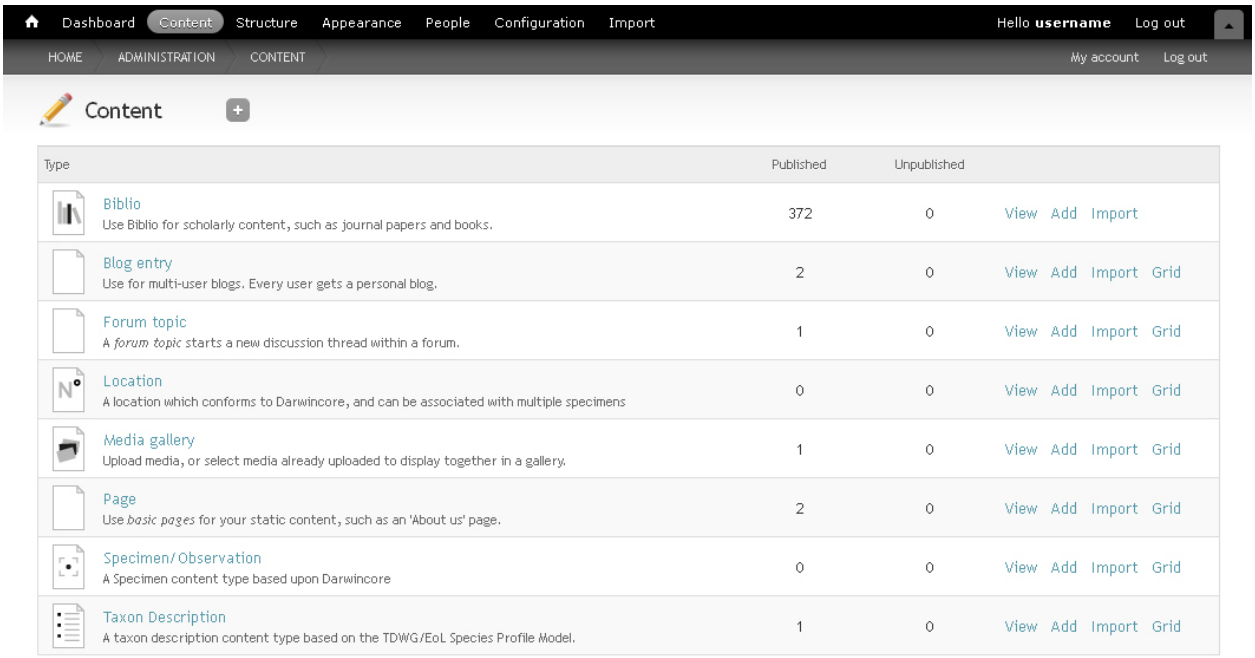


Fig. 5: Showing Hide Genus terms filter



3. Enter a *LOCATION IDENTIFIER*. The location identifier needs to be unique because it is used for referencing this location while adding specimens.

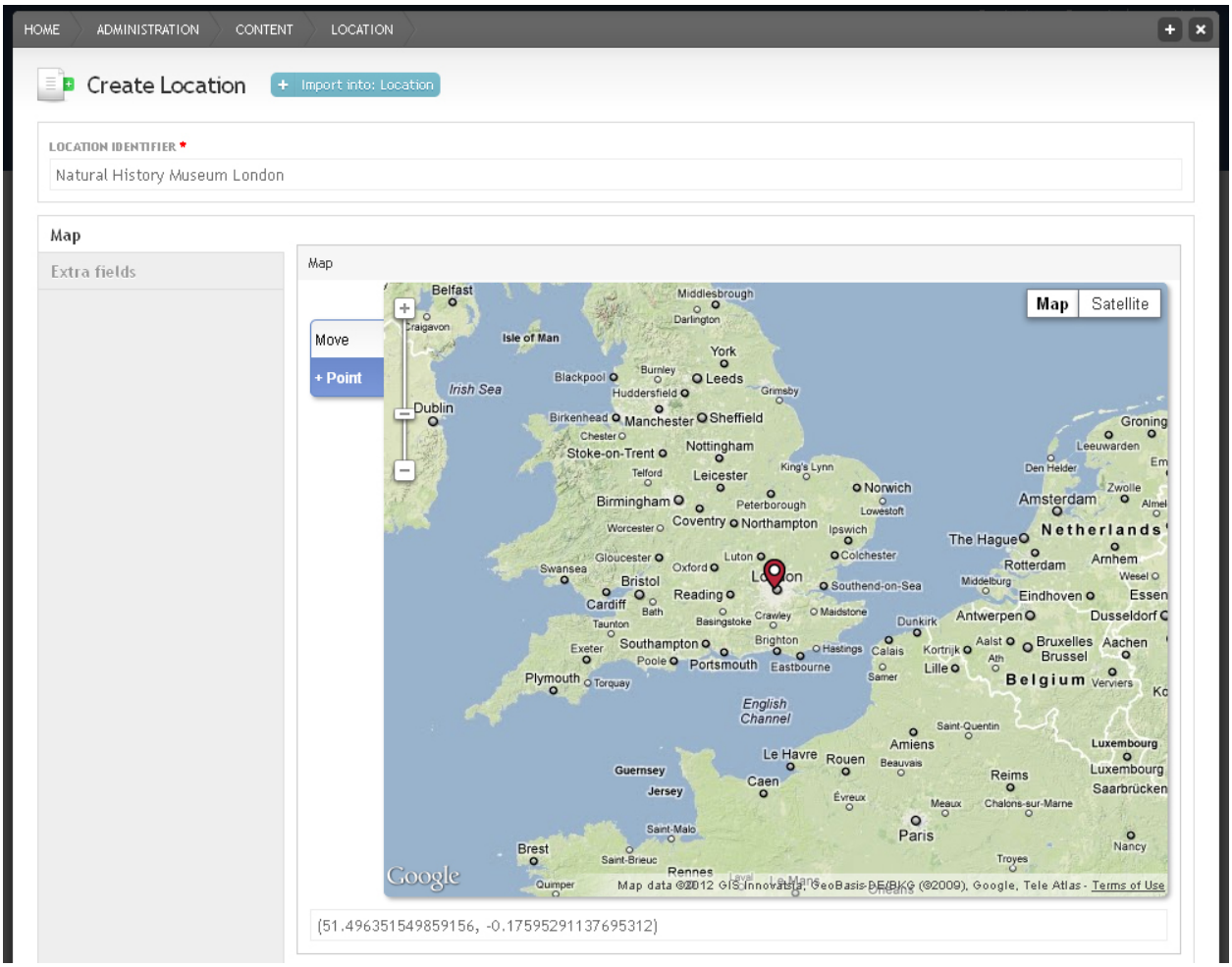
   Either click on the *Point* tab for the map to add a point to the map with a left mouse click (delete is with right click) or enter the latitude and longitude in decimal degrees (coordinate system WGS84) in the field below the map.

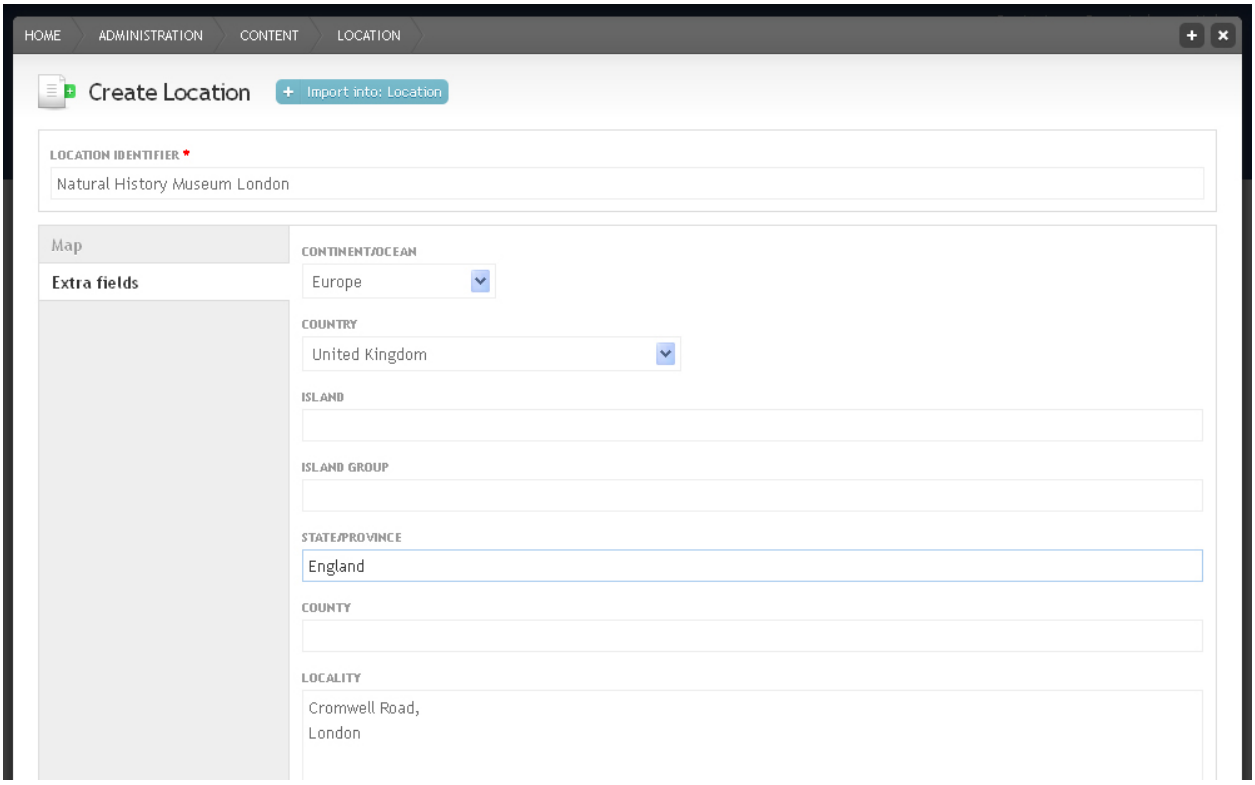
4. Click on the *Extra Fields* tab for additional optional fields.
5. Select a *COUNTRY* from the drop down menu
6. Use the *LOCALITY* field to enter information that is not covered in any of the other fields
7. Click *Save*

1.16.2 Adding a specimen

1. From the *Admin menu* go to *Content*
2. Click the *Add* link next to *Specimen/Observation*.
3. There are five different vertical tabs:
   - Required
   - Taxonomy
   - Collection
   - Miscellaneous
   - Location

   Each of these tabs has different fields that can optionally be completed in order to create a new specimen record.


HOME
ADMINISTRATION
CONTENT
LOCATION
Create Location
Import into: Location
LOCATION IDENTIFIER *
Natural History Museum London
Map
Extra fields
Map
Move
+ Point
Map
Satellite
Belfast
Middlesbrough
Darlington
Isle of Man
York
Leeds
Irish Sea
Dublin
Manchester
Sheffield
Nottingham
Leicester
Norwich
Birmingham
Coventry
Northampton
Peterborough
Amsterdam
Netherlands
The Hague
Rotterdam
Amsterdam
Bristol
Cardiff
Reading
Southampton
Portsmouth
Plymouth
Antwerpen
Belgium
Bruxelles
Brussel
Aachen
Lille
Calais
Dunkirk
English Channel
Le Havre
Rouen
Caen
Amiens
Reims
Paris
Luxembourg
Guernsey
Jersey
Brest
Rennes
Nancy
Google
Map data ©2012 GIS innovatsia, GeoBasis-DE/BKG (©2009), Google, Tele Atlas - Terms of Use
(51.496351549859156, -0.17595291137695312)



4. Fill out the fields under the *Required* tab. The two code fields together with the catalogue number generate a unique ID for this specimen record that is used as the specimen title
5. 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
6. Fill in the information under the *Collection* and *Miscellaneous* tabs
7. 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.
8. In addition to the fields above, you can also add a media file to your specimen record
9. Click *Save*

You will be redirected to view your specimen, including thumbnails of any media you attached and a map of the location.

If you tagged the specimen with a taxonomy term, you can now find the specimen records under the *Specimens* tab of the classification view.

1.16.3 Cloning specimen

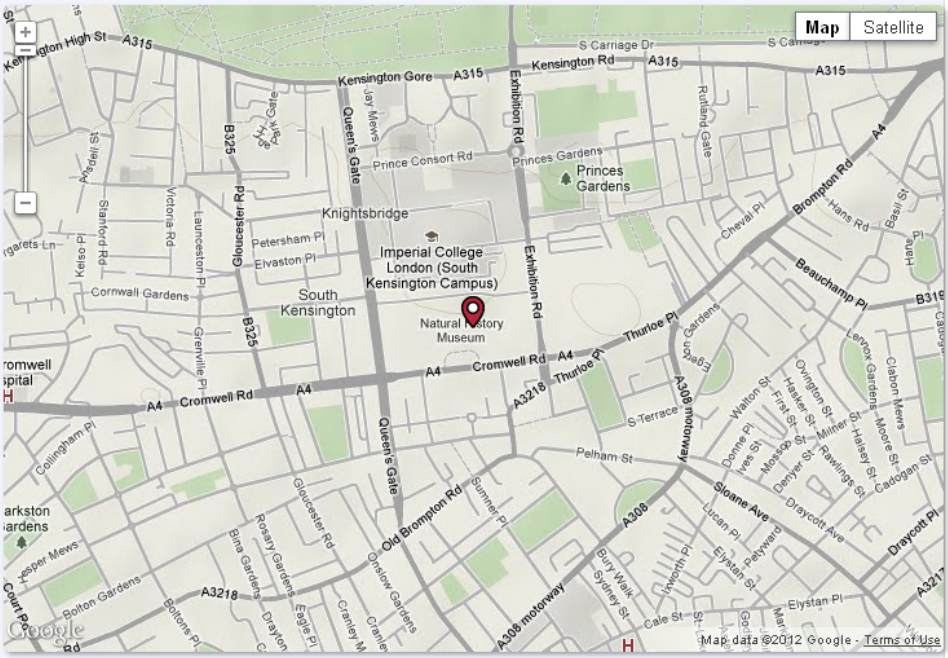
Click on the *Clone* tab to create a similar specimen from the same location by just changing the data in the *CATALOGUE NUMBER* field.

In practice most people will (at least initially) want to enter locality and specimen records in bulk - see *Import specimens*.

Location *Natural History Museum London* has been created.

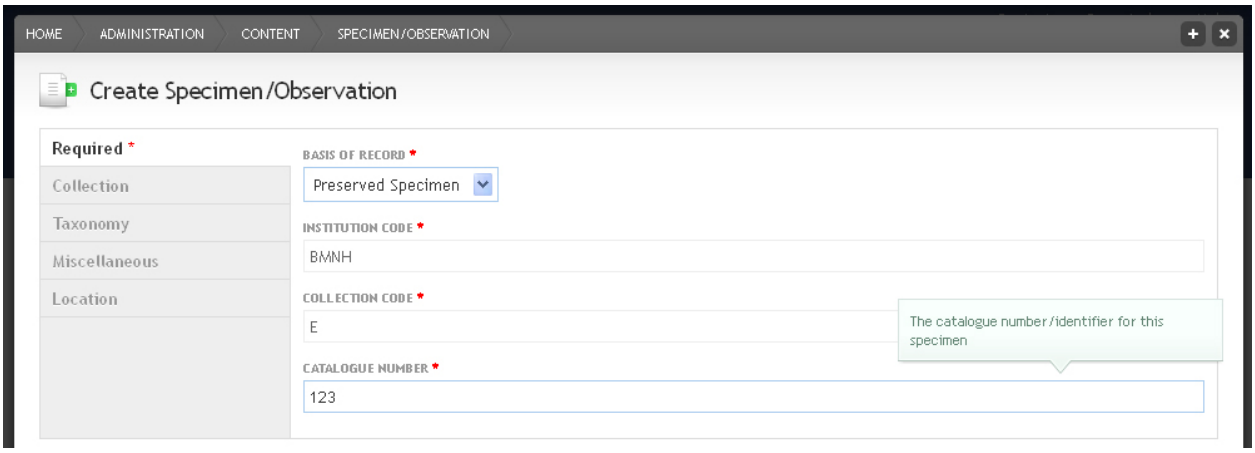
Natural History Museum London

View | Edit | Clone



State/Province:	England
Continent/Ocean:	Europe
Country:	United Kingdom
Locality:	Cromwell Road, London

Fig. 6: Location node



HOME | FORUMS | INTRODUCTION | LICE2 | LITERATURE | MEDIA GALLERY | SPECIMENS | BLOG | ABOUT US

Home » BMNH - E - 123

Specimen/Observation *BMNH - E - 123* has been updated.

SPECIMEN/OBSERVATION

- View all Specimen/Observations
- Natural History Museum London Specimen/Observations

LICE2

- Pediculus humanus

BMNH - E - 123

View | Edit | Clone

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:	
Count:	5
Lifestage:	adult
Sex:	Female

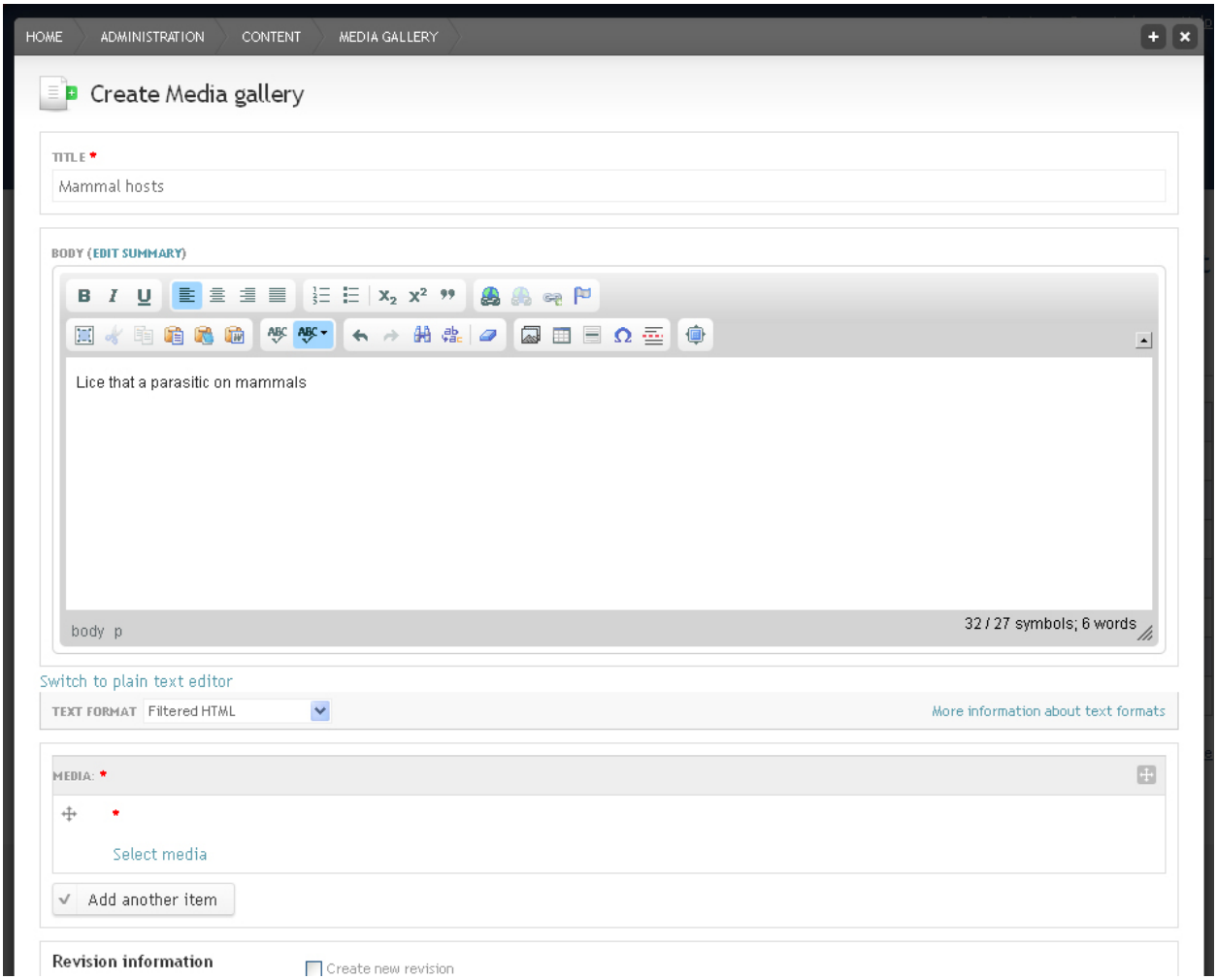
LOCATION

Continent/Ocean:
Europe
Locality:
Cromwell Road, London

1.17 Media gallery

Media Galleries are used to organise Images or other media types in groups. You may use media galleries to organise your media thematically according to the your needs.

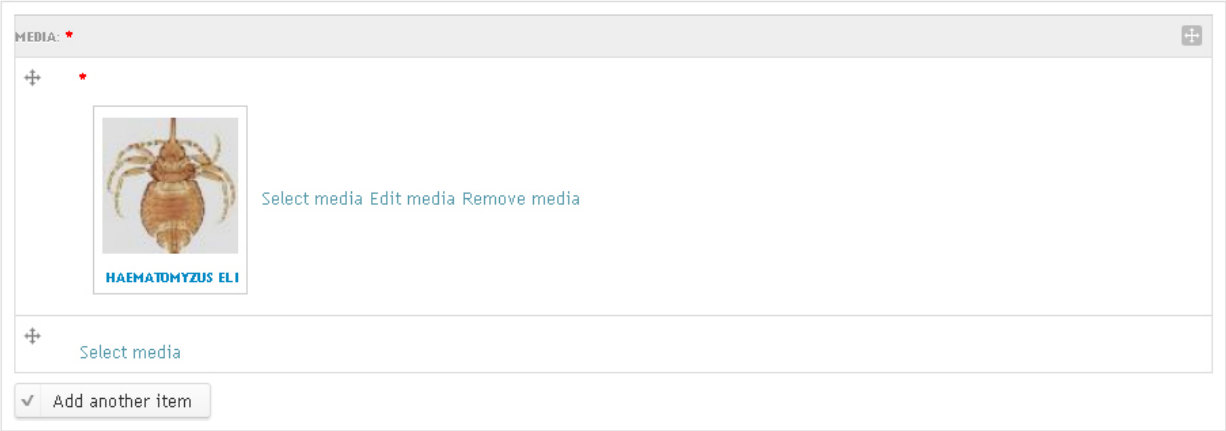
1. From the *Admin menu* go to *Content* > *Media gallery*
2. Click + *media gallery*
3. Enter a *TITLE* and a short description of the gallery in the *BODY* field

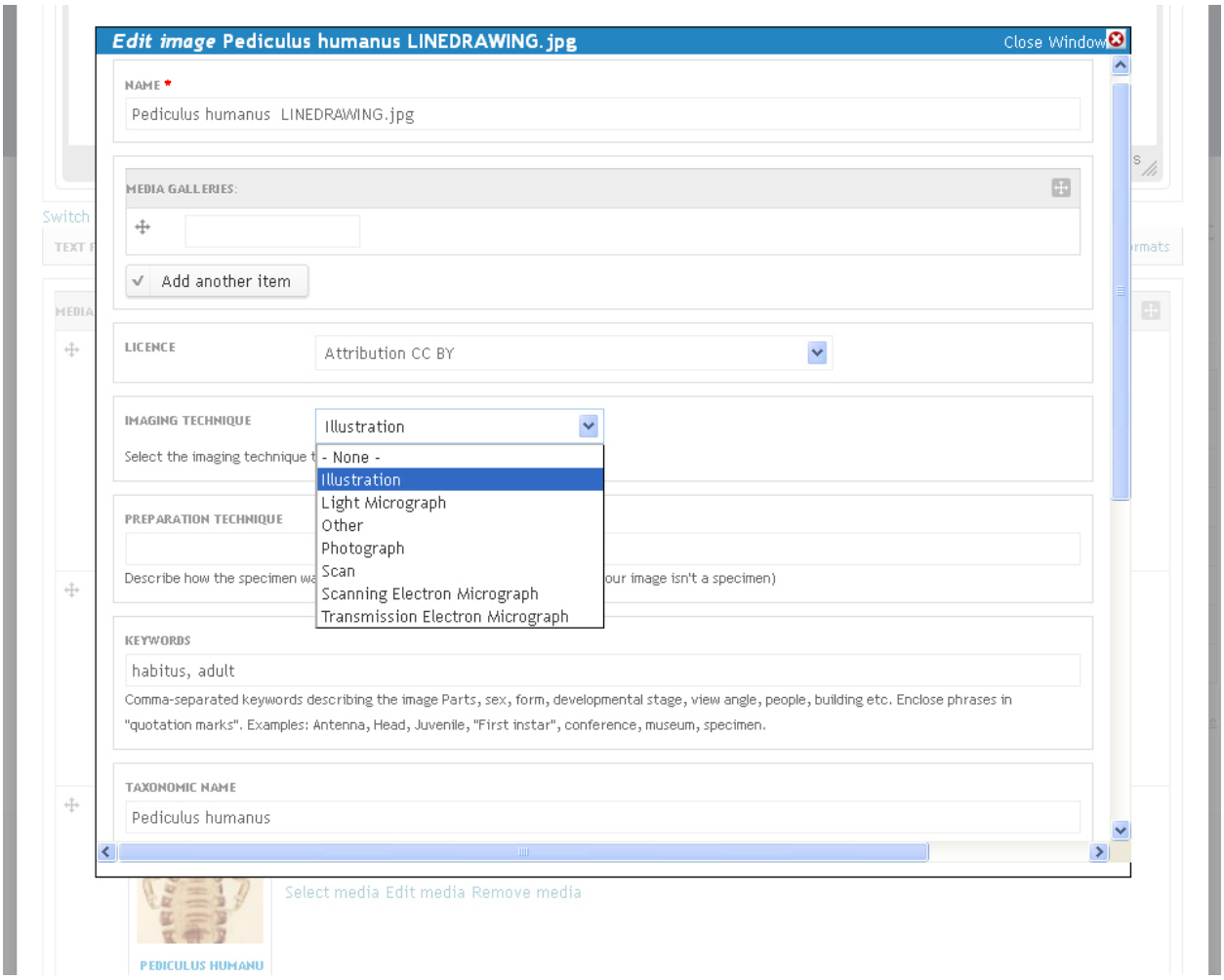


4. In the *Media box* click on *Select media* and either upload a new image or, if you already uploaded images, click on the *Library* tab and select the image(s) you want to link to this media gallery
5. Click *Submit*

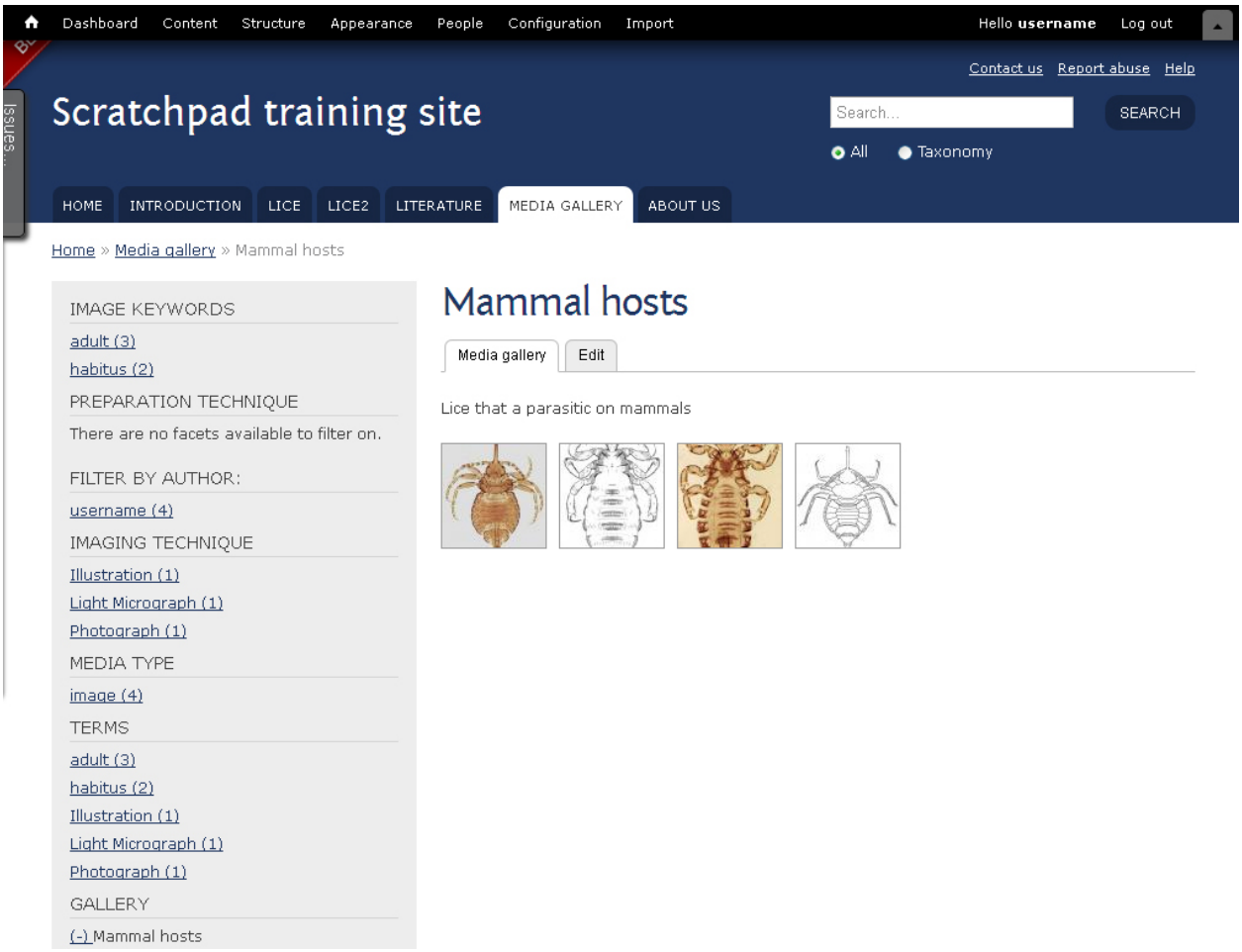
6. To change the creative commons license (the default licence is the one you chose during the set up workflow) or annotate your image in other ways (taxonomic name, imaging technique, keywords, etc.) click on *Edit media* next to the respective image.

   If you upload several images, it is faster to use the *Grid editor* to edit several images at once (see *Edit content*)
7. To add another image click the *Add another item* button and select another media file.


MEDIA: *
HAEMATOMYZUS ELI
Select media Edit media Remove media
Select media
Add another item


Edit image Pediculus humanus LINEDRAWING.jpg
Close Window
NAME *
Pediculus humanus LINEDRAWING.jpg
MEDIA GALLERIES:
Add another item
LICENCE
Attribution CC BY
IMAGING TECHNIQUE
Illustration
Select the imaging technique t
- None -
Illustration
Light Micrograph
Other
Photograph
Scan
Scanning Electron Micrograph
Transmission Electron Micrograph
PREPARATION TECHNIQUE
Describe how the specimen wa
our image isn't a specimen)
KEYWORDS
habitus, adult
Comma-separated keywords describing the image Parts, sex, form, developmental stage, view angle, people, building etc. Enclose phrases in "quotation marks". Examples: Antenna, Head, Juvenile, "First instar", conference, museum, specimen.
TAXONOMIC NAME
Pediculus humanus
Select media Edit media Remove media
PEDICULUS HUMANU

8. Click *Save*
9. After saving you will see your media gallery and images.



1.17.1 Troubleshooting

If the images are missing, refresh the page in your browser (Control+F5 on a PC) after a couple minutes.

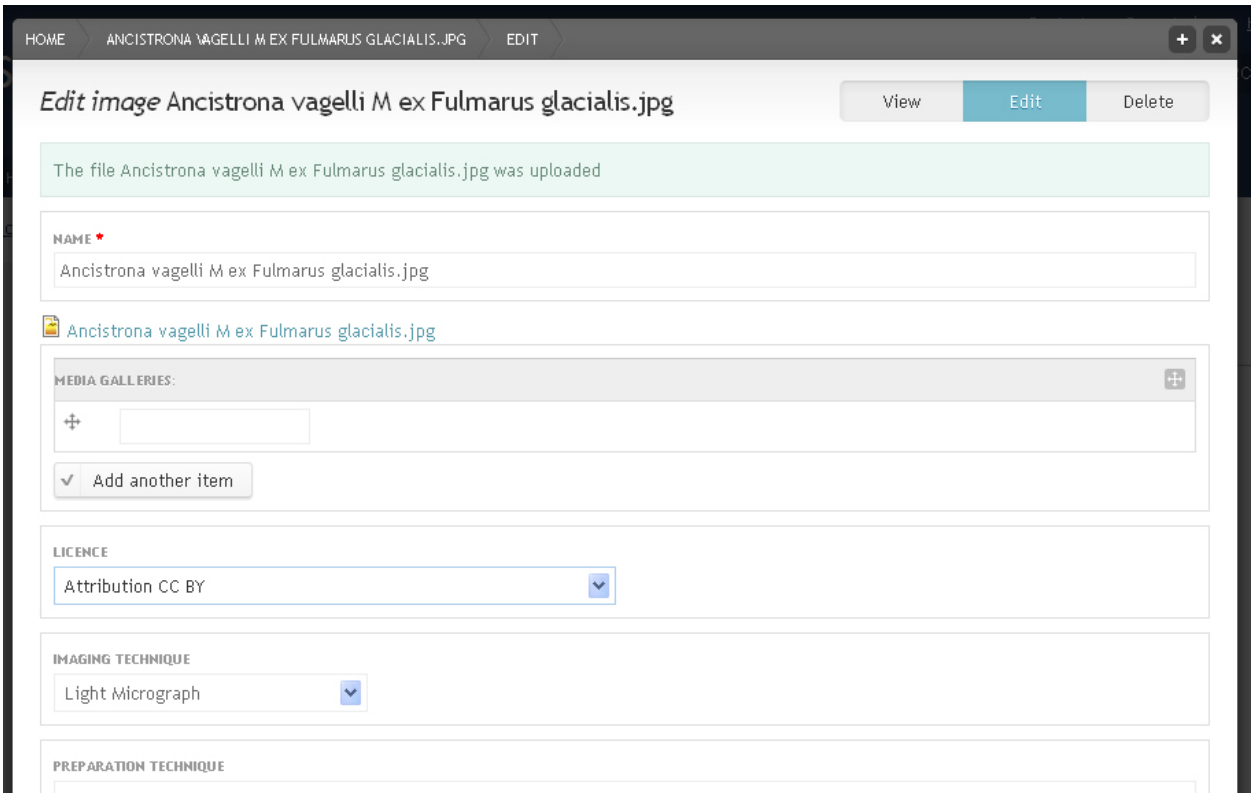
1.18 Images & media

1. From the *Admin menu* go to *Content*
2. Click on the *Add* link next to *Images* in the *Files* section at the bottom
3. 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).
4. After selecting your file(s) click *Start upload* and wait for the files to upload.
5. Click on *Submit*

1.18.1 Editing metadata

If you want to set image metadata (e.g. title, media gallery or taxonomic name), you will need to edit the image.

1. From the *Admin menu* go to *Content*
2. Select *Image*
3. Find the uploaded image, and click *Edit*
4. Change the *TITLE* if necessary and fill in the other fields as needed.



5. 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.

6. Click on the *Misc* vertical tab. Fill the *Media Gallery* you wish your image(s) to belong to
7. Click *Save*

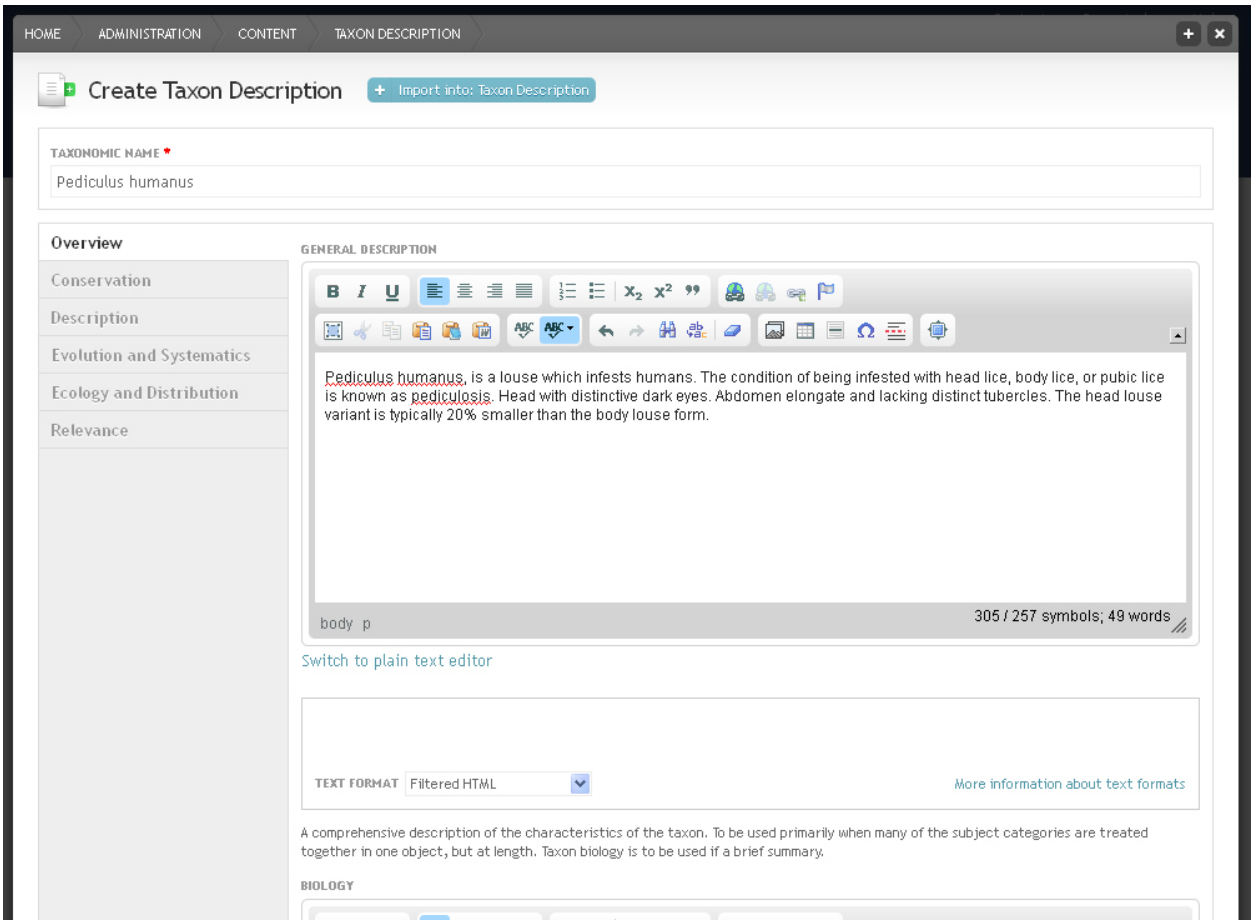
If you upload several images, it is faster to use the *Grid editor* to edit several images at once (see *Edit content*)

1.19 Taxon descriptions

The *Taxon description* content type is based on TDWG's *SPM* (Species Profile Model) standard.

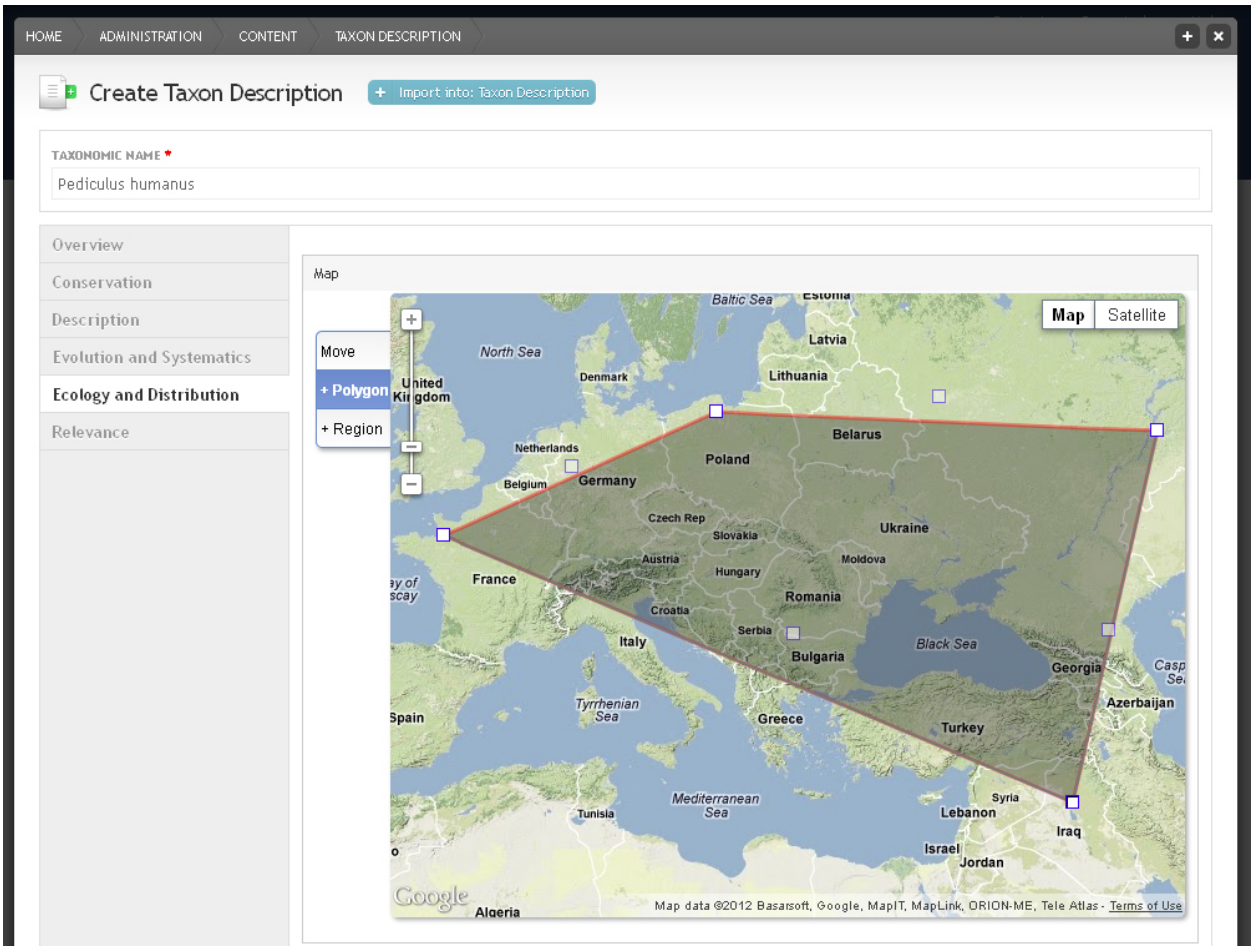
1.19.1 Adding a taxon description with distribution map

1. Click *Content* in the *Admin menu*
2. Click *Add* next to *Taxon description*



3. Add the taxon name into the *Taxonomic Name* field (this will autocomplete once you start typing)
4. Fill the fields as needed. Use the *Morphology* field for the actual morphological description of the taxon and *Diagnostic Description* for the diagnosis
5. To add a distribution map click on the *Ecology and Distribution* tab

6. 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.



7. 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.

8. Click Save

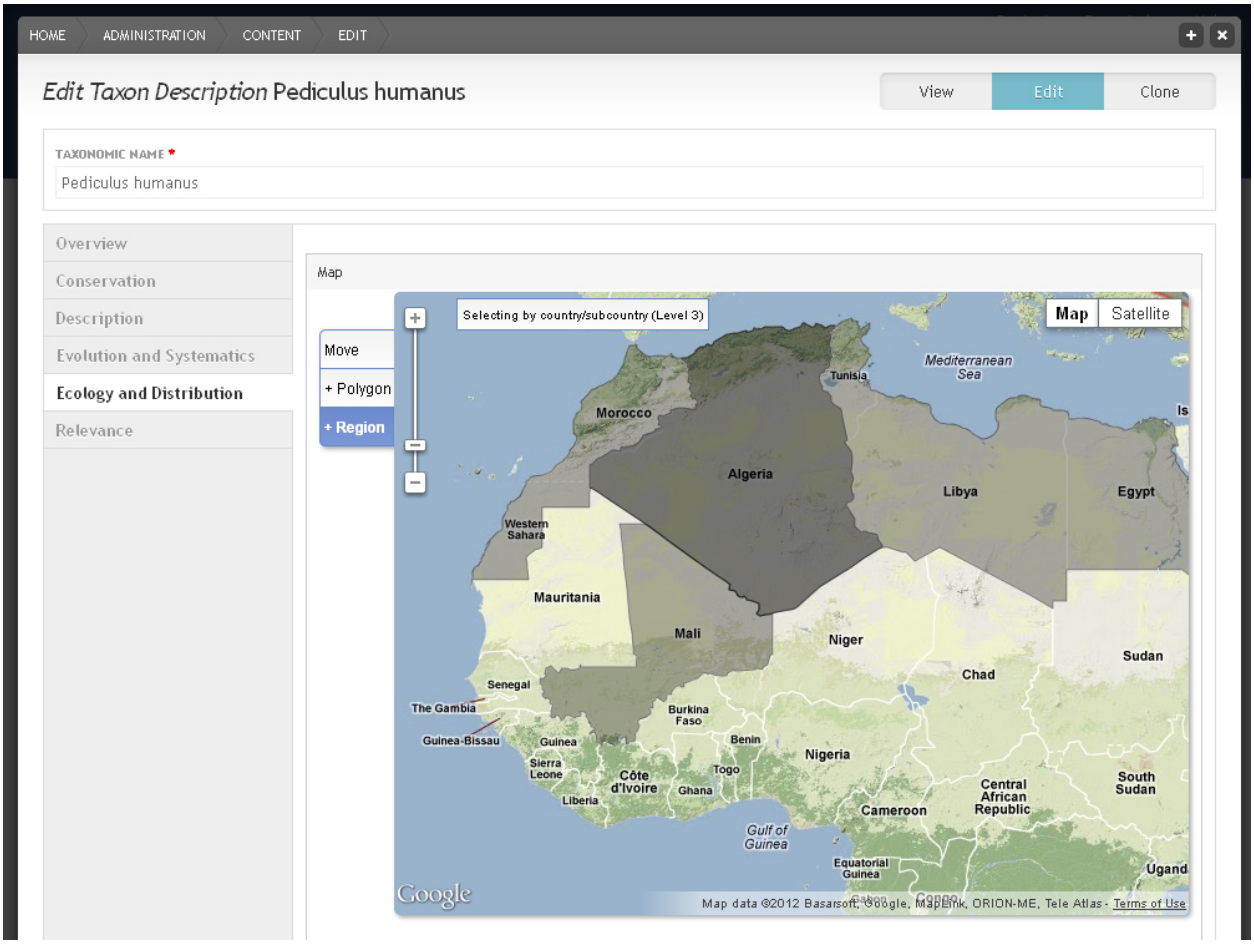
1.20 Literature

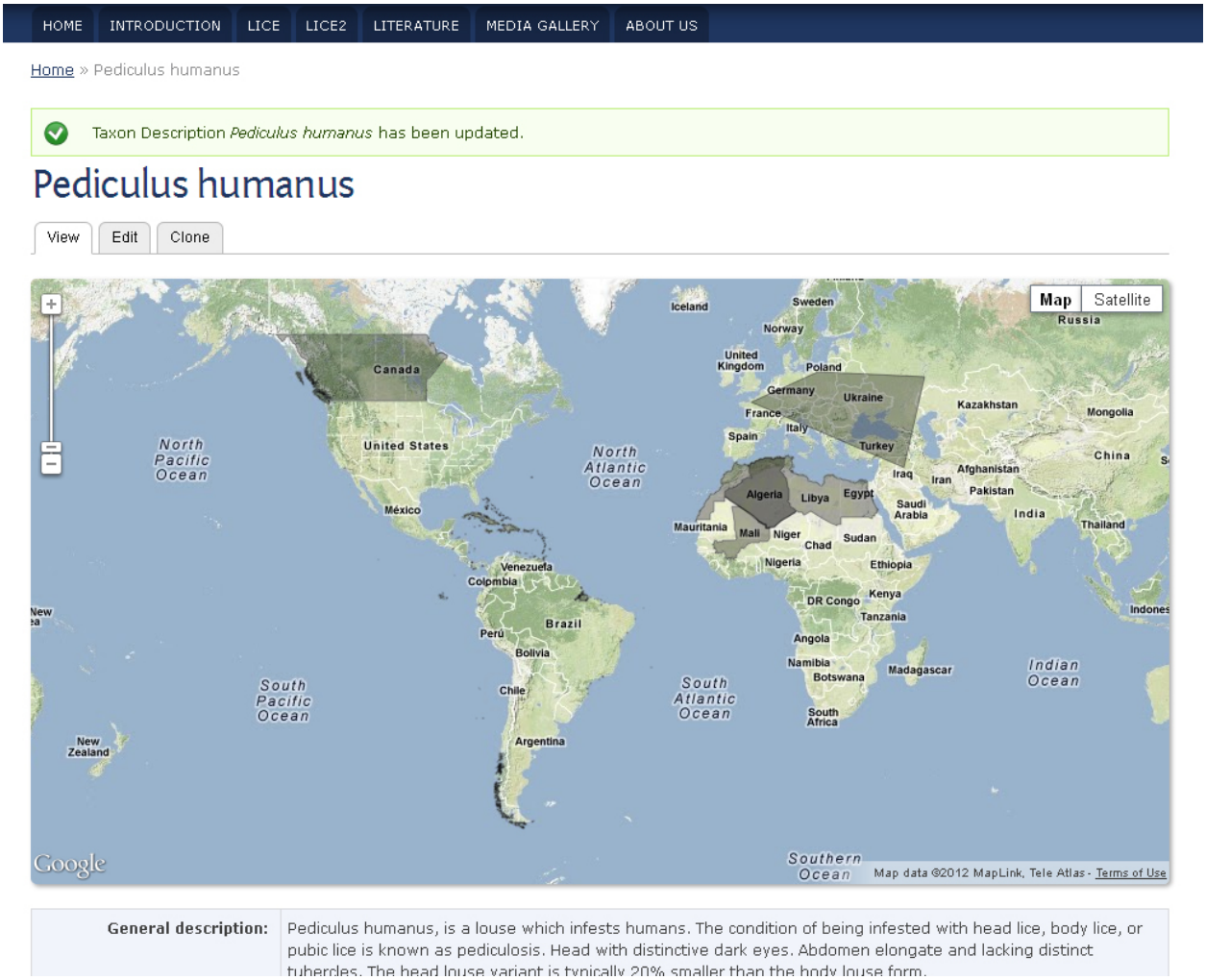
1.20.1 Add a single reference

1. Click *Content* in the *Admin menu* and then on the *Add* link for Biblio.

2. 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.

3. You can also add a bibliographic record by pasting the BibTeX or RIS record or looking it up.


HOME
ADMINISTRATION
CONTENT
EDIT
Edit Taxon Description Pediculus humanus
View
Edit
Clone
TAXONOMIC NAME *
Pediculus humanus
Overview
Conservation
Description
Evolution and Systematics
Ecology and Distribution
Relevance
Map
Selecting by country/subcountry (Level 3)
Map
Satellite
Move
+ Polygon
+ Region
Mediterranean Sea
Tunisia
Morocco
Algeria
Libya
Egypt
Western Sahara
Mauritania
Mali
Niger
Chad
Sudan
Senegal
The Gambia
Guinea-Bissau
Guinea
Sierra Leone
Liberia
Côte d'Ivoire
Burkina Faso
Ghana
Togo
Benin
Nigeria
Cameroon
Central African Republic
South Sudan
Gulf of Guinea
Equatorial Guinea
Ugand
Google
Map data ©2012 Basarsoft, Google, MapLink, ORION-ME, Tele Atlas - Terms of Use



General description:	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 tubercles. The head louse variant is typically 20% smaller than the body louse form.

Adding file attachments to a reference

1. It is possible add a file to a bibliographic record
2. Underneath the field bibliography fields there is a *File attachments* section
3. Click the *Choose File* button and select your file (default allowed files are txt, pdf, doc) then click *Upload*
4. Once the file has been uploaded click *Save*
5. You should now see the file at the bottom of the page when viewing the reference

1.20.2 Edit a reference

1. Click on the title of any biblio entry to go to the node page for that entry. Click on the *Edit* tab.
2. You can now edit this individual entry, changing any of the fields that you consider to need changing.
3. Tag this biblio node to the classification by adding the respective term in the TAXONOMIC NAME field.

   Only references that are linked to the classification will show up on your taxon pages.
4. Press the *Save* button.

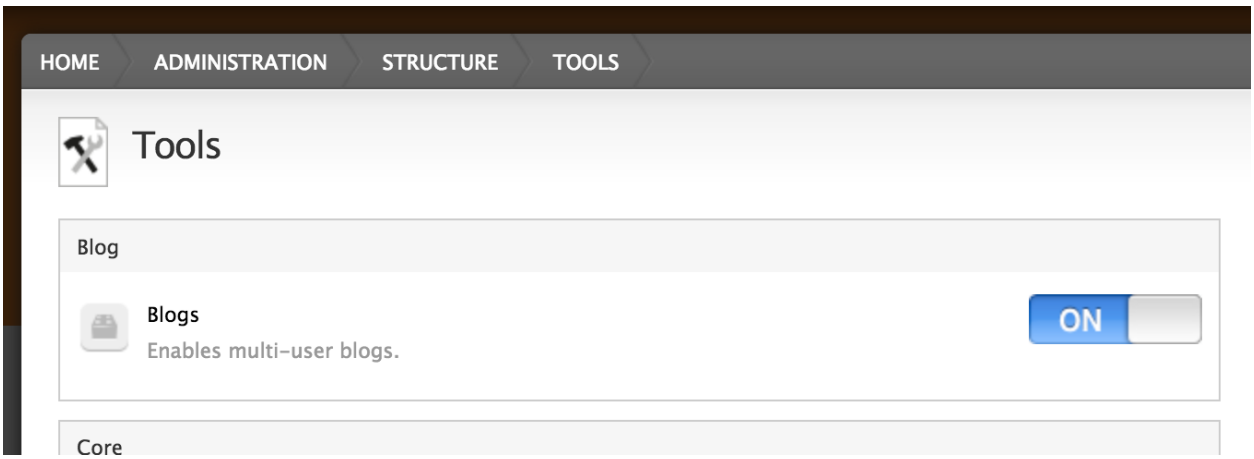
1.21 Blog

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.

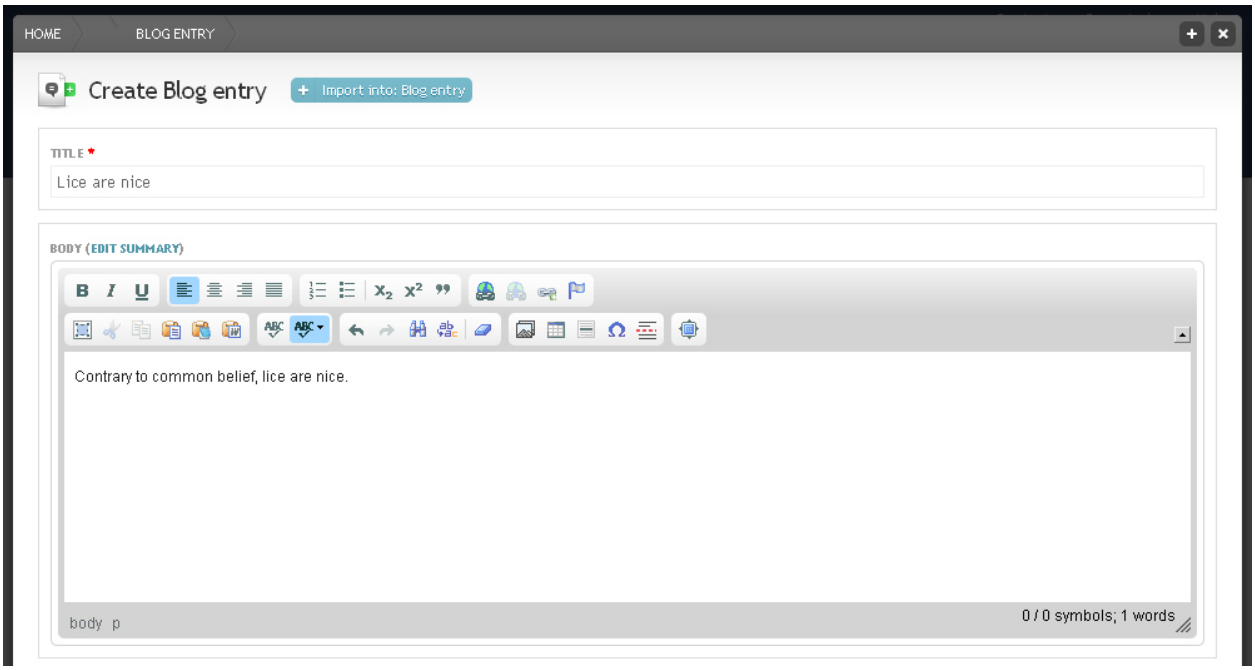
1.21.1 Instructions

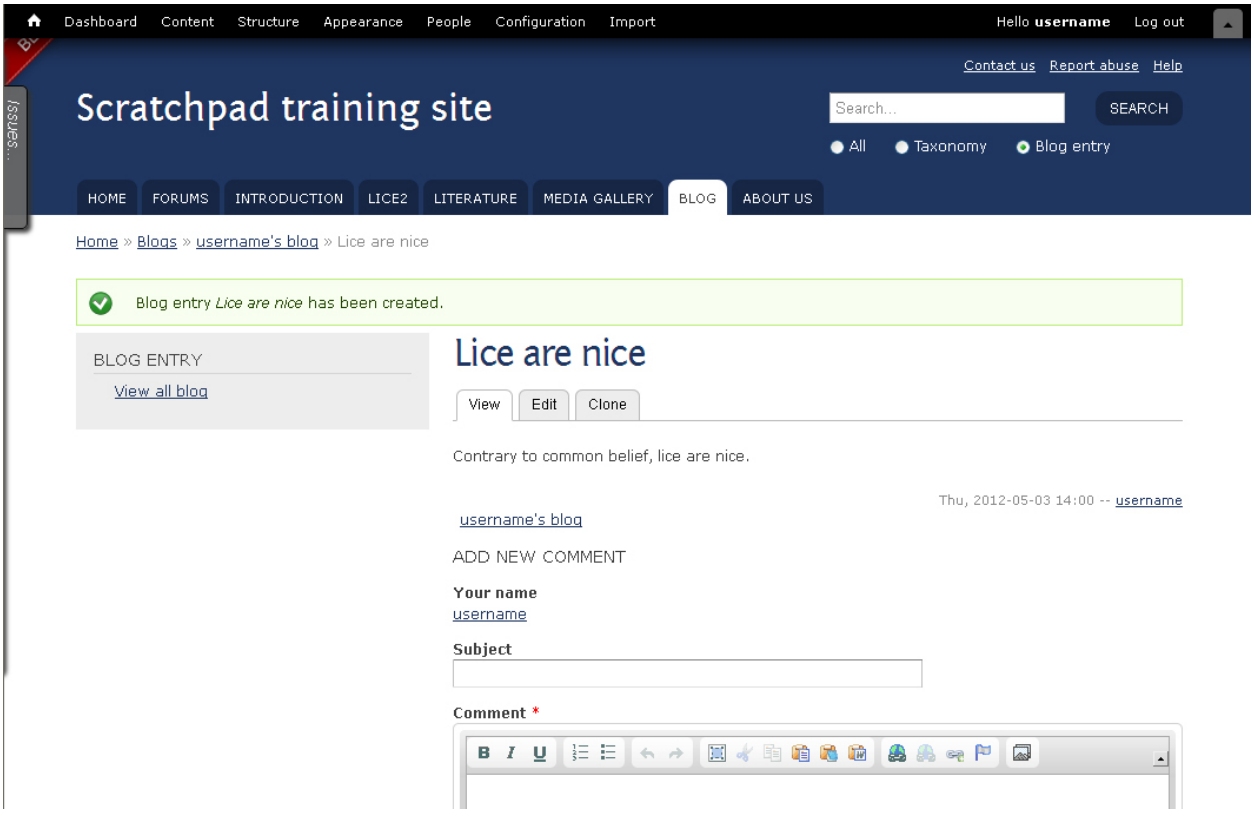
1. To enable the blog go to *Structure* in the *Admin menu* and click on *Tools*.

   In the *Blog* section enable blog and save.

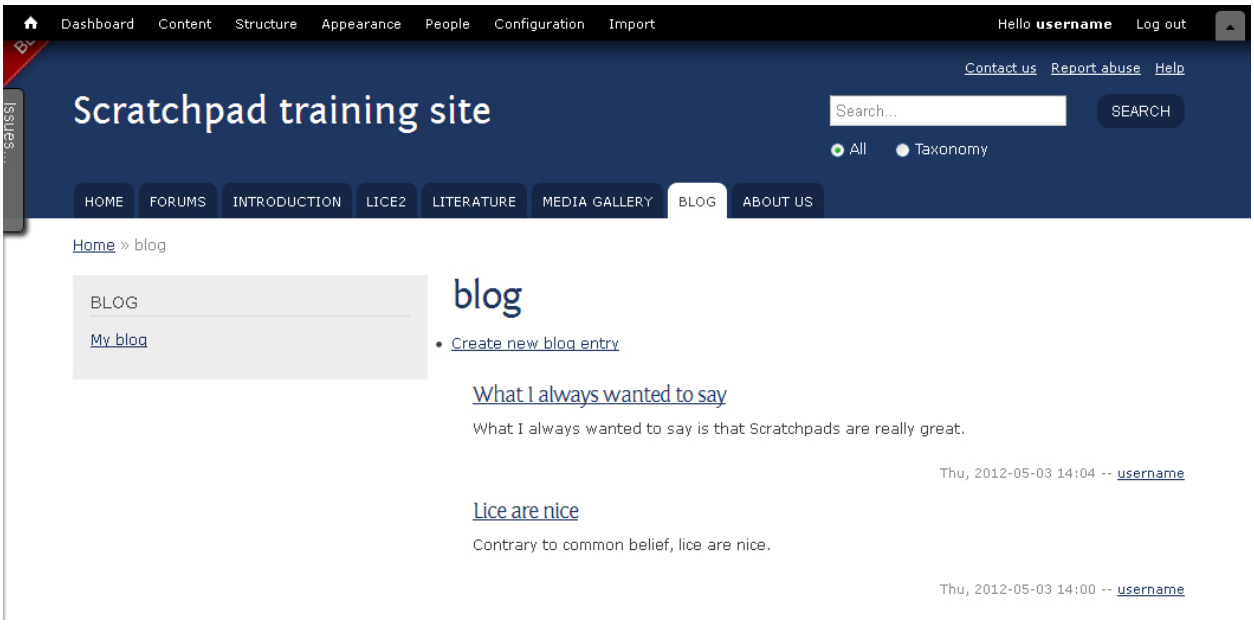


2. Click *Content* in the *Admin menu* and then on the *Add* link for Blog entry.
3. Enter the title and some body text
4. Click *Save*


HOME
BLOG ENTRY
Create Blog entry
Import into: Blog entry
TITLE *
Lice are nice
BODY (EDIT SUMMARY)
Contrary to common belief, lice are nice.
body p
0 / 0 symbols; 1 words


Dashboard
Content
Structure
Appearance
People
Configuration
Import
Hello username
Log out
Contact us
Report abuse
Help
Scratchpad training site
Search...
SEARCH
All
Taxonomy
Blog entry
HOME
FORUMS
INTRODUCTION
LICE2
LITERATURE
MEDIA GALLERY
BLOG
ABOUT US
Home » Blogs » username's blog » Lice are nice
Blog entry Lice are nice has been created.
BLOG ENTRY
View all blog
Lice are nice
View
Edit
Clone
Contrary to common belief, lice are nice.
Thu, 2012-05-03 14:00 -- username
username's blog
ADD NEW COMMENT
Your name
username
Subject
Comment *

5. You can find your newly created blog entry in the *Blogs* tab in the *Main menu*.



The *Blogs* tab shows the blog entries from all users. You can filter by user using the facets in the left hand column. You can also filter blog posts by clicking on the link to *this users blog* available at the bottom of a blog entry. Alternatively go the the user's account and use the link there.

1.22 Forums

Forums are basic communication tools between Scratchpads community members. They facilitate public discussions on selected topics. To create forums you first have to enable this functionality from the Scratchpads administration menu.

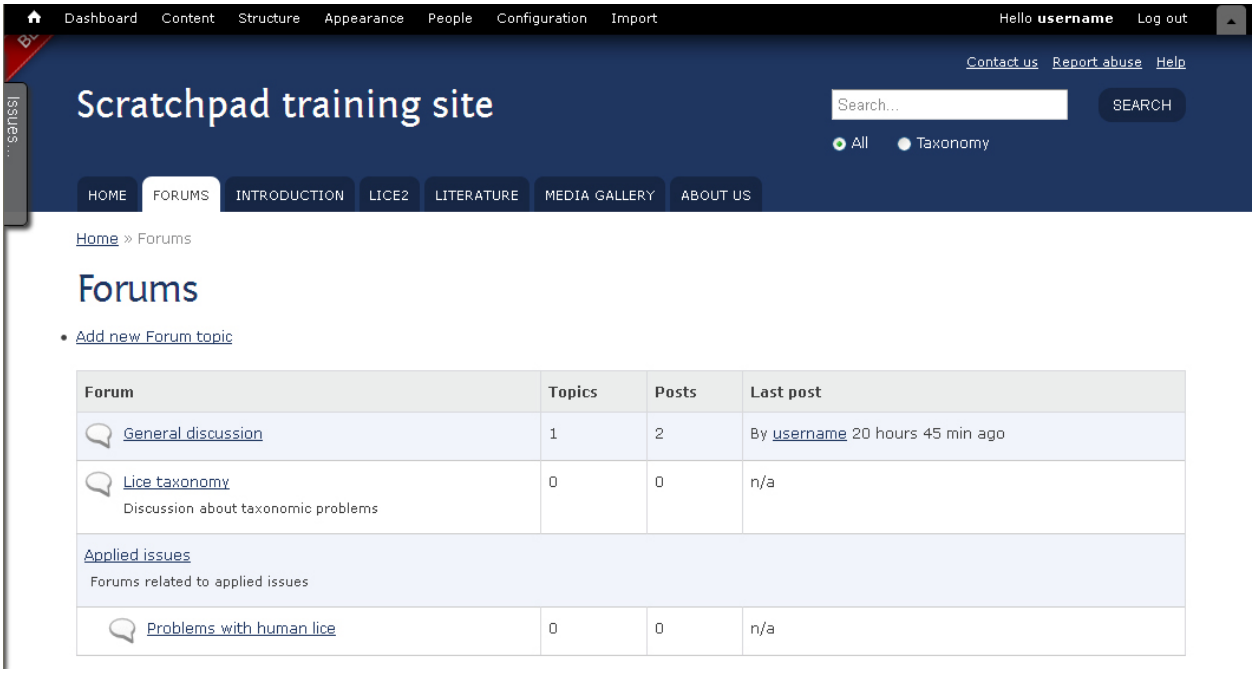
1.22.1 Enabling the Forums module

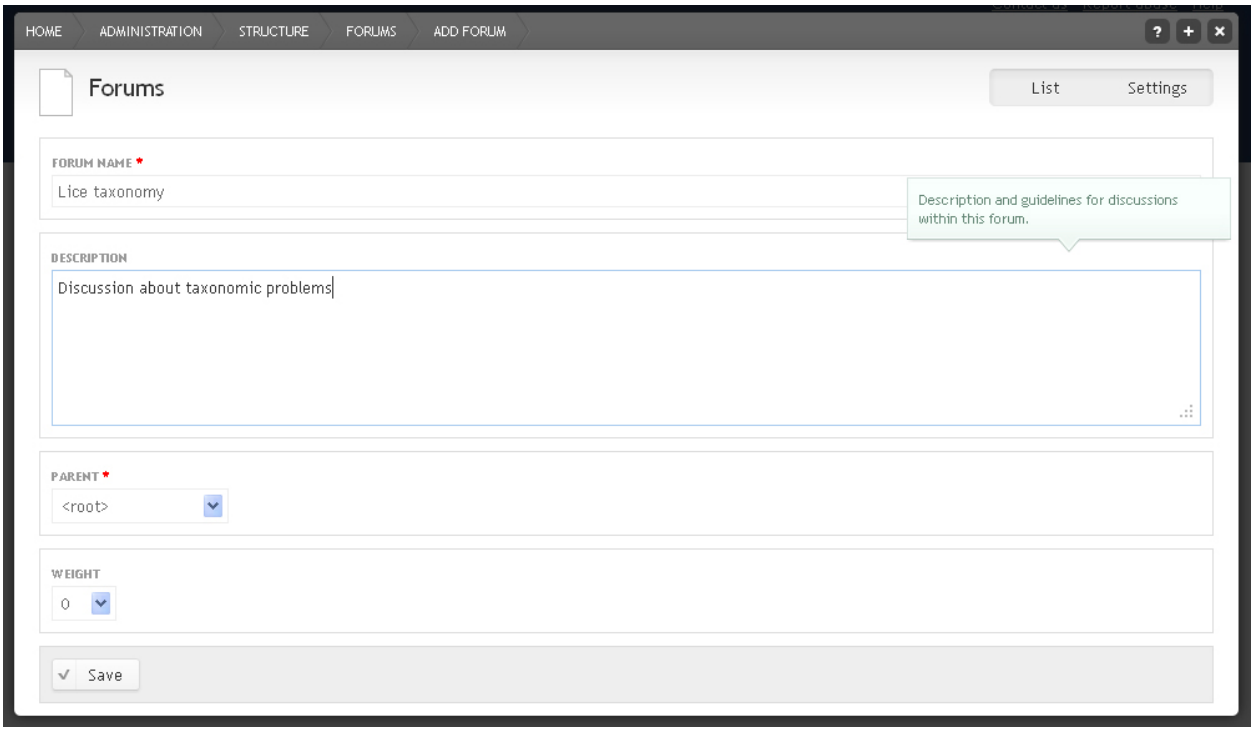
1. From the *Admin menu* bar go to *Structure* > *Tools*
2. Find the *Forum* section and enable *Forums*
3. Click *Save*

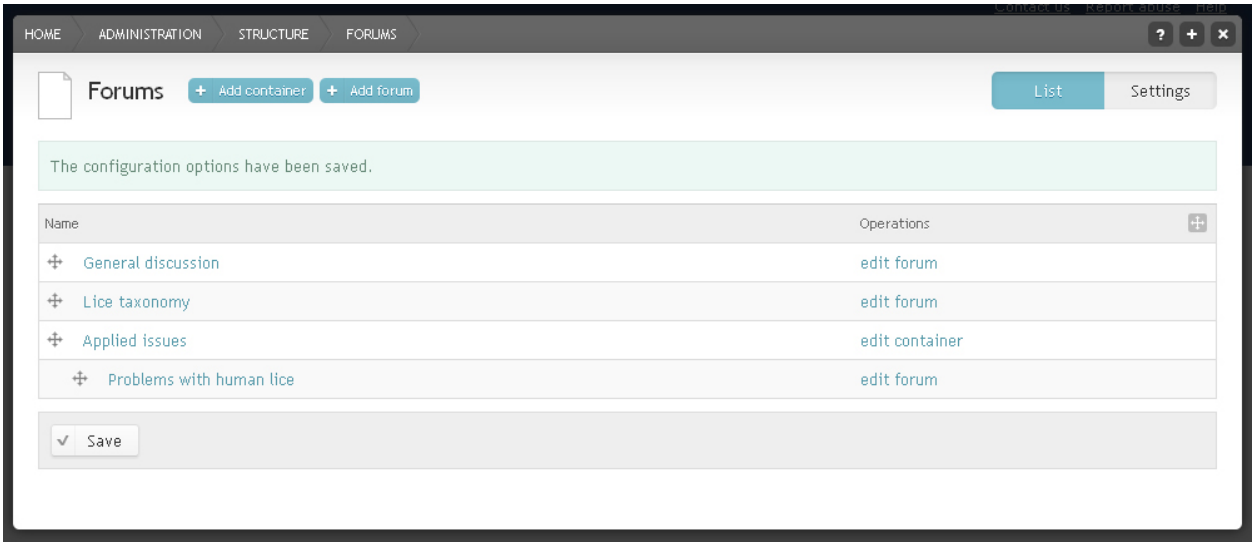
1.22.2 Creating a forum

1. Click on *Structure* in the *Admin menu* and click on *Forums*
2. 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.
3. Click *Save*

You can access the forum by clicking on the *Forums* link in the *Admin menu*.


Dashboard
Content
Structure
Appearance
People
Configuration
Import
Hello username
Log out
Contact us
Report abuse
Help
Scratchpad training site
Search...
SEARCH
All
Taxonomy
HOME
FORUMS
INTRODUCTION
LICE2
LITERATURE
MEDIA GALLERY
ABOUT US
Home » Forums
Forums
Add new Forum topic
Forum
Topics
Posts
Last post
General discussion
1
2
By username 20 hours 45 min ago
Lice taxonomy
Discussion about taxonomic problems
0
0
n/a
Applied issues
Forums related to applied issues
Problems with human lice
0
0
n/a


HOME
ADMINISTRATION
STRUCTURE
FORUMS
ADD FORUM
Forums
List
Settings
FORUM NAME *
Lice taxonomy
Description and guidelines for discussions within this forum.
DESCRIPTION
Discussion about taxonomic problems
PARENT *
<root>
WEIGHT
0
Save

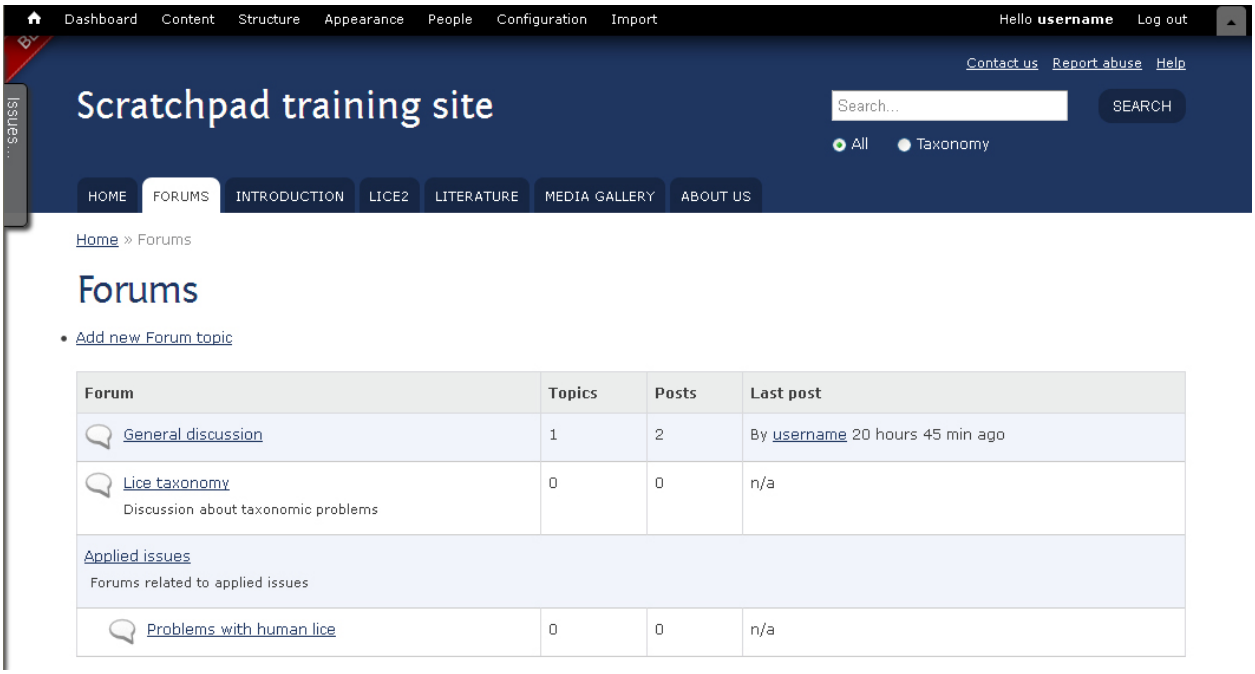


1.22.3 Forum containers

You can add containers to group related forums together.

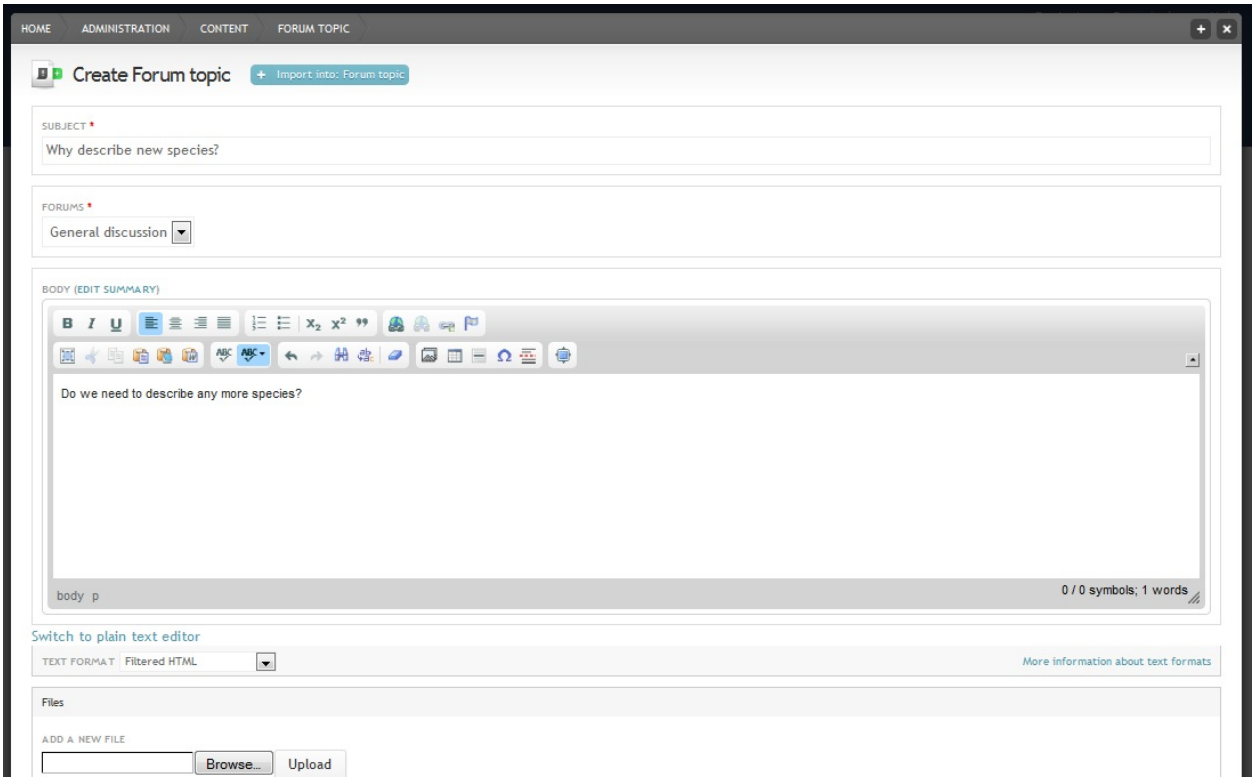
1. Click on *Structure* in the *Admin menu* and click on *Forums*
2. Click on + *Add container*

When creating/editing forums you can select the container as the forum parent, creating a hierarchy of forums.

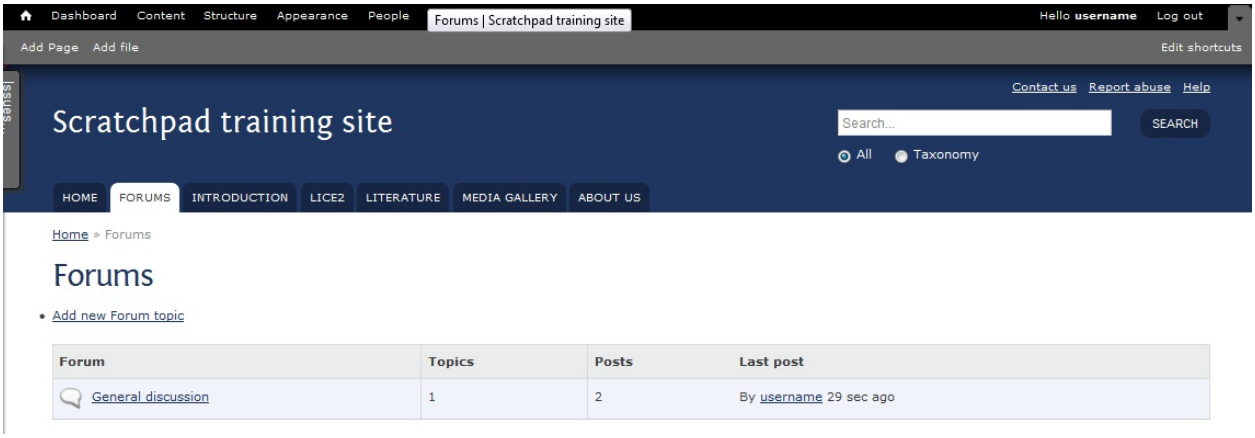


1.22.4 Adding a forum topic

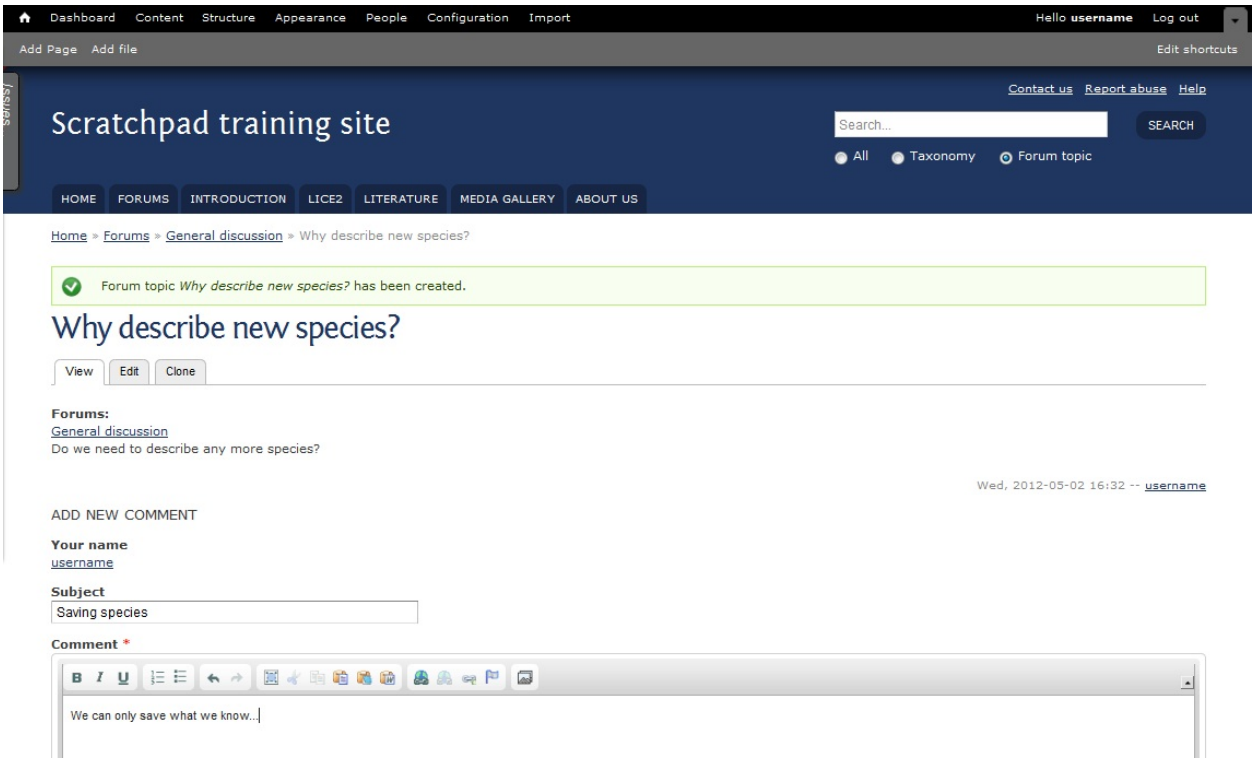
Every forum can have multiple topics, or discussions. To create a new forum topic:



1. Click *Content* in the *Admin menu* and then on the *Add* link for Forum topic.
2. 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". Enter the text of the topic in the *BODY* field
3. Click *Save*
4. To reply to a forum topic, click to enter the forum topic discussion.



And reply using the comment form.



1.23 Newsletter

Newsletter can be created using the Simplenews module. They are sent to subscribed email addresses, and provide a nice way to contact users of your Scratchpad

1.23.1 Enabling the Simplenews module

1. From the *Admin menu* bar go to *Structure* > *Tools*
2. Find the *Mail* section and enable *Simplenews*
3. Click *Save*

1.23.2 Configuring Simplenews

Once installed, we need to setup Simplenews.

1. Still on the Tools page in the *Mail* section a link *Configure Simplenews* has appeared. Click this link.

   Alternatively, from the *Admin menu* bar go to *Configuration* > *Newsletters*
2. Newsletters are organised into categories, each category with their own settings. Some settings useful to change:
   - From name
   - Subject
3. The *Subscribe new account* setting controls whether new signs are automatically added to the newsletter mailing.

1.23.3 Create a newsletter

1. From the *Admin menu* bar go to *Content*
2. Under *Simplenews newsletter* select *Add*
3. Enter a TITLE and DESCRIPTION.
4. Select the newsletter category.
5. Ensure *Published* is selected under "Publishing options"
6. Save

1.23.4 Create a newsletter issue

The newsletter has been created and is ready to be sent.

1. Click the *Newsletter* tab, on the node.

   Send newsletter settings

2. If you'd like to send a test newsletter, select "Send one test newsletter to the test address" and click *Submit* button.
3. To send the newsletter to the subscribed emails, select 'Send newsletter' and click *Submit* button.

1.23.5 User subscriptions

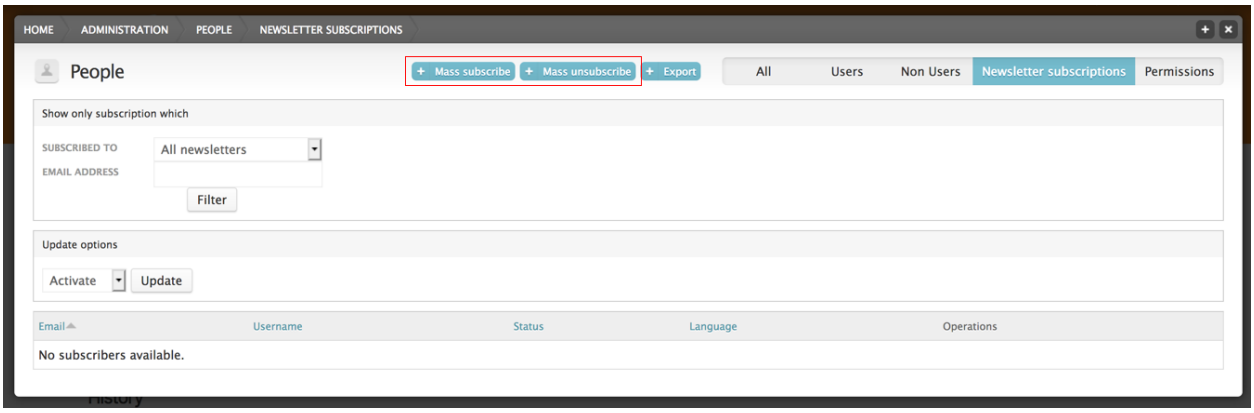
Depending on your Simplenews settings, users can either:

1) Subscribe to newsletters when they register
2) Edit their user account
3) Not subscribe on their own and you have to subscribe them.

To view and edit user subscriptions:

1. From the *Admin menu* bar go to *People*.
2. Click *Newsletter subscriptions* to see a list of users and their subscription status to the different categories of newsletters.
3. You can Activate/Inactivate/Delete users.

To subscribe/unsubscribe several users at once click *Mass subscribe* or *Mass unsubscribe* blue links at the top, enter the email addresses of the users (these have to be the email addresses of users that are allowed to login)



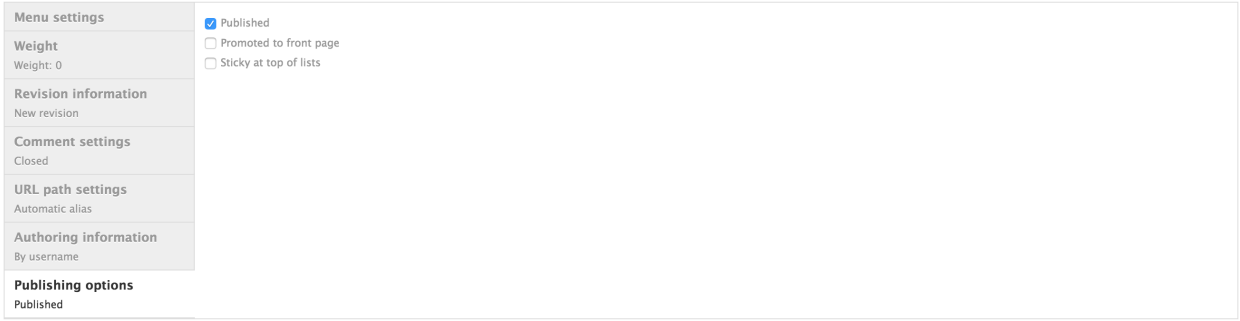
To subscribe a single user, click *Manage subscriptions* link available on a user profile page.

1.24 Publishing

Items of content on *Scratchpads* can be either *Published* or *Unpublished*. Unpublished content is not viewable by members of the public and is a good method of creating drafts before publishing them.

1.24.1 Publishing options

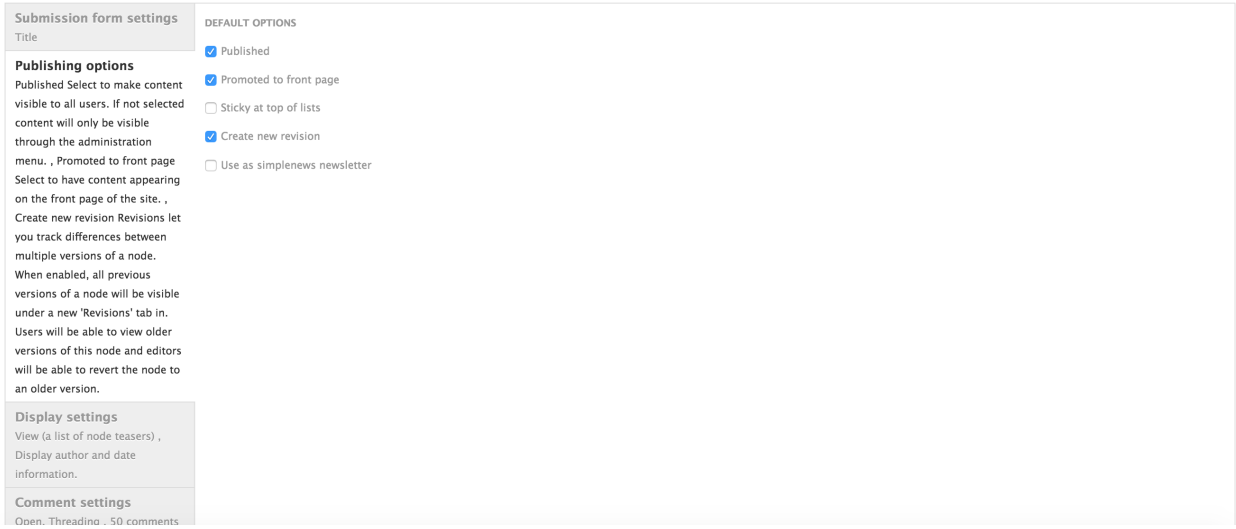
Every content type has a publishing checkbox as part of the *Edit/Create* form.



1.24.2 Default publishing option

You can set whether content is published/unpublished by default on the edit content form.

1. Under *Admin menu* go to *Structure* > *Content types*
2. Next to the content type, click the *Edit* link
3. In the *Publishing options* tab, change the *Default options*



1.24.3 Unpublished content

Unpublished content will only be available to the author of the content; it will not be public on the site.

When viewing unpublished content the background will be coloured pink:

1.25 Finding content

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

1.25.1 Search

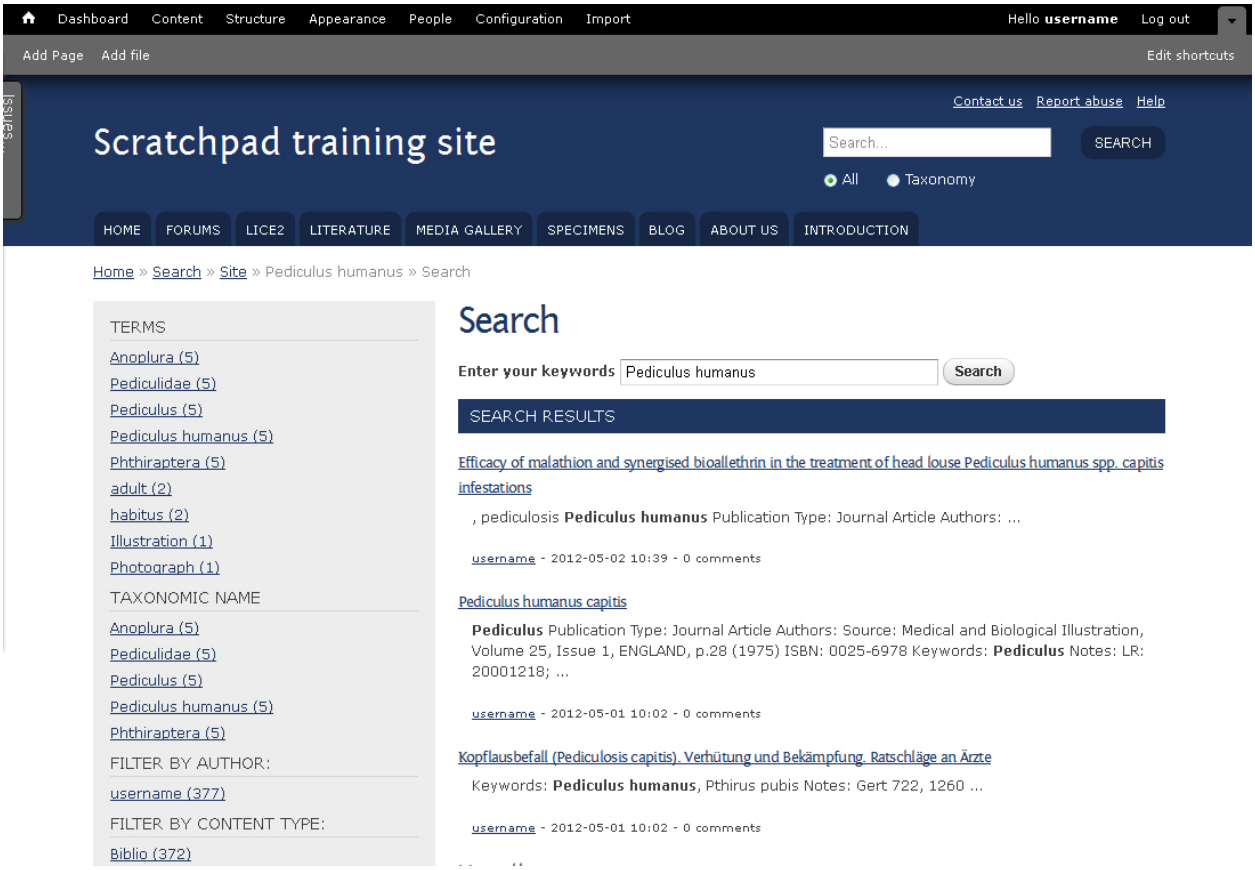
The Search box in the header has different search options: *All* and *Taxonomy*.

All finds all content that includes the search term.

Taxonomy only searches for terms in one of the vocabularies and returns the matched terms.

The search functionality is aware of the content type you're viewing: 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.



1.25.2 Faceted Search

Some pages provide the option of faceted search in a separate block on the left of the page. Faceted search can be used to filter the nodes of a content type (e.g. References) To use the faceted search:

- Fields with less than 20 terms show up as a list. Click on a term to restrict results for this term

_static/facet_less_than_20.png

- Fields with more than 20 terms also provide an auto-complete search box. Fill in the term and press enter or else select from the list
- You can remove a filter by clicking on the (-) sign next to a selected term
- You can filter the content based on multiple fields

1.25.3 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.

_static/facet_more_than_20.png

1.25.4 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.

1.25.5 Recent content

You can also view all recent content - see *Recent content*.

1.26 Recent content

Tracking all the new content of your site can be very useful, especially if you are participating in a large Scratchpads community.

The 'tracker' module allows users to keep track of the latest changes they made in the site.

1.26.1 Enabling the module

1. From the *Admin menu* go to *Structure* > *Tools*
2. Find the section called *Core*
3. Enable the *Tracker* module
4. Click *Save*

1.26.2 Track new content

Once the module is enabled a new "*Track*" tab will appear on every user profile page. Click the tab to view a list of all content created by that user.

1.26.3 Dashboard

Your Dashboard also provides a view of all recent content added to a Scratchpad.

Click on *Dashboard* in the *Admin menu*.

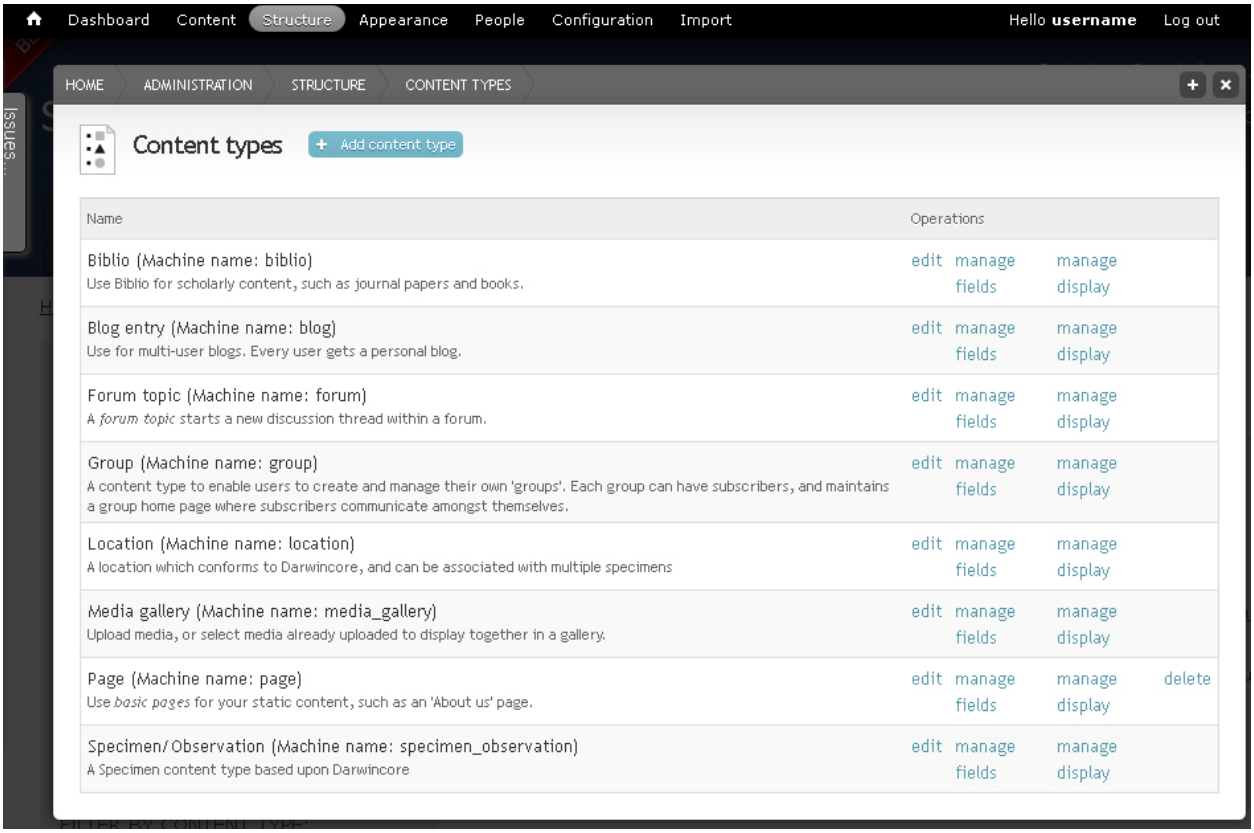
This dashboard can be customised to display other useful information - see *Customise dashboard*.

1.27 Custom content

So far we have only worked with predefined content types, but Scratchpads also let you defined custom content types. This allows you to create content in which the data are entered and saved in specific fields.

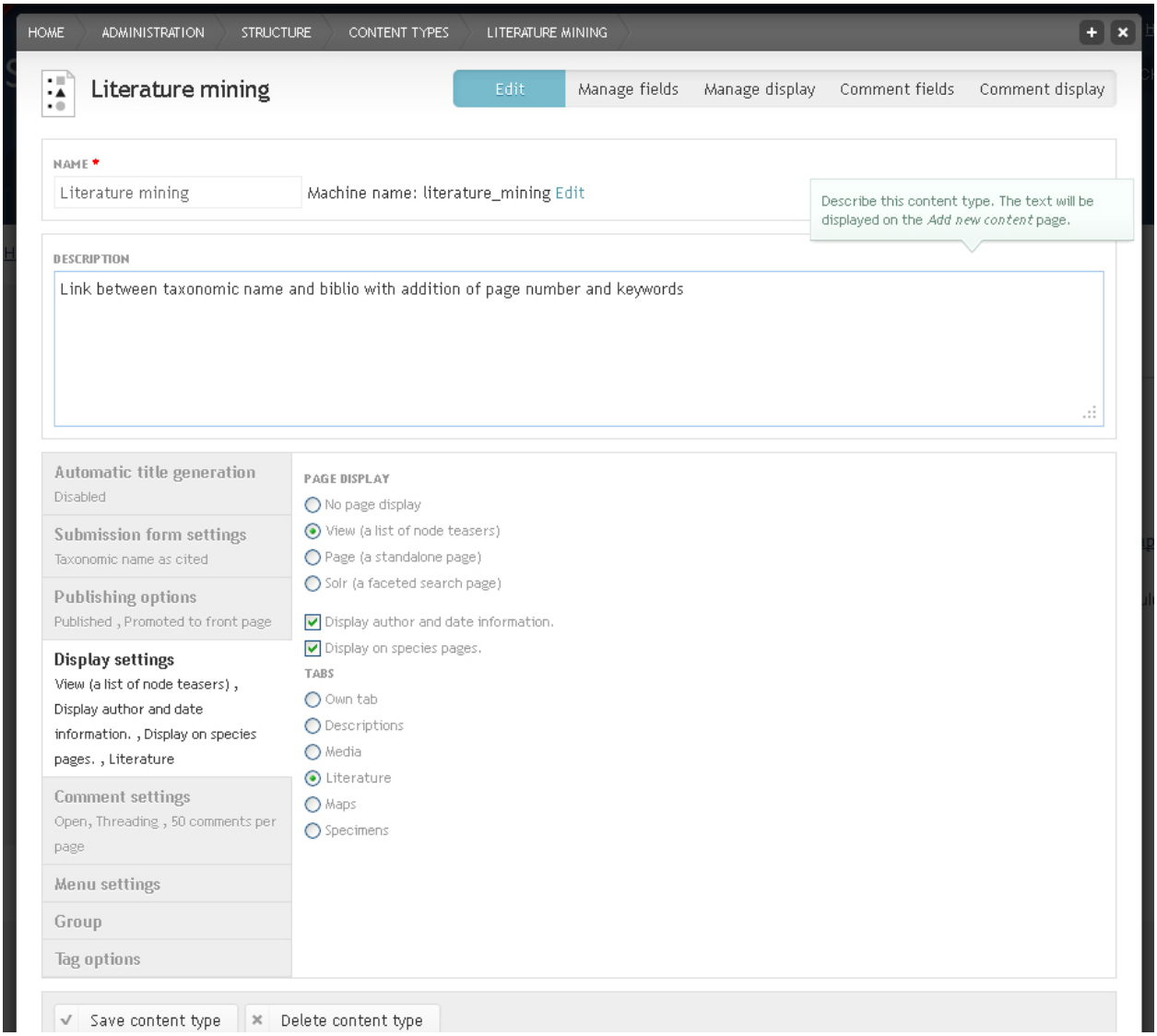
1.27.1 Adding content type

1. From the *Admin menu* go to *Structure* > *Content types*



2. Click + *Add content type* link at the top
3. Enter a *NAME* ("Literature mining") and *DESCRIPTION*

4. Under the *Submission form settings* tab change the *TITLE FIELD LABEL* to *Taxonomic name as cited*
5. Under the *Display settings* tab choose the *View* display and select *Display on species pages*
6. Choose on which tab of the species pages the new content type should be visible
7. Select *Own tab* so that the new content type appears on a tab of its own
8. Click the *Save and add fields* button. This will lead to the *Manage fields* tab


HOME
ADMINISTRATION
STRUCTURE
CONTENT TYPES
LITERATURE MINING
Literature mining
Edit
Manage fields
Manage display
Comment fields
Comment display
NAME *
Literature mining
Machine name: literature_mining Edit
Describe this content type. The text will be displayed on the Add new content page.
DESCRIPTION
Link between taxonomic name and biblio with addition of page number and keywords
Automatic title generation
Disabled
Submission form settings
Taxonomic name as cited
Publishing options
Published , Promoted to front page
Display settings
View (a list of node teasers) , Display author and date information. , Display on species pages. , Literature
Comment settings
Open, Threading , 50 comments per page
Menu settings
Group
Tag options
PAGE DISPLAY
No page display
View (a list of node teasers)
Page (a standalone page)
Solr (a faceted search page)
Display author and date information.
Display on species pages.
TABS
Own tab
Descriptions
Media
Literature
Maps
Specimens
Save content type
Delete content type

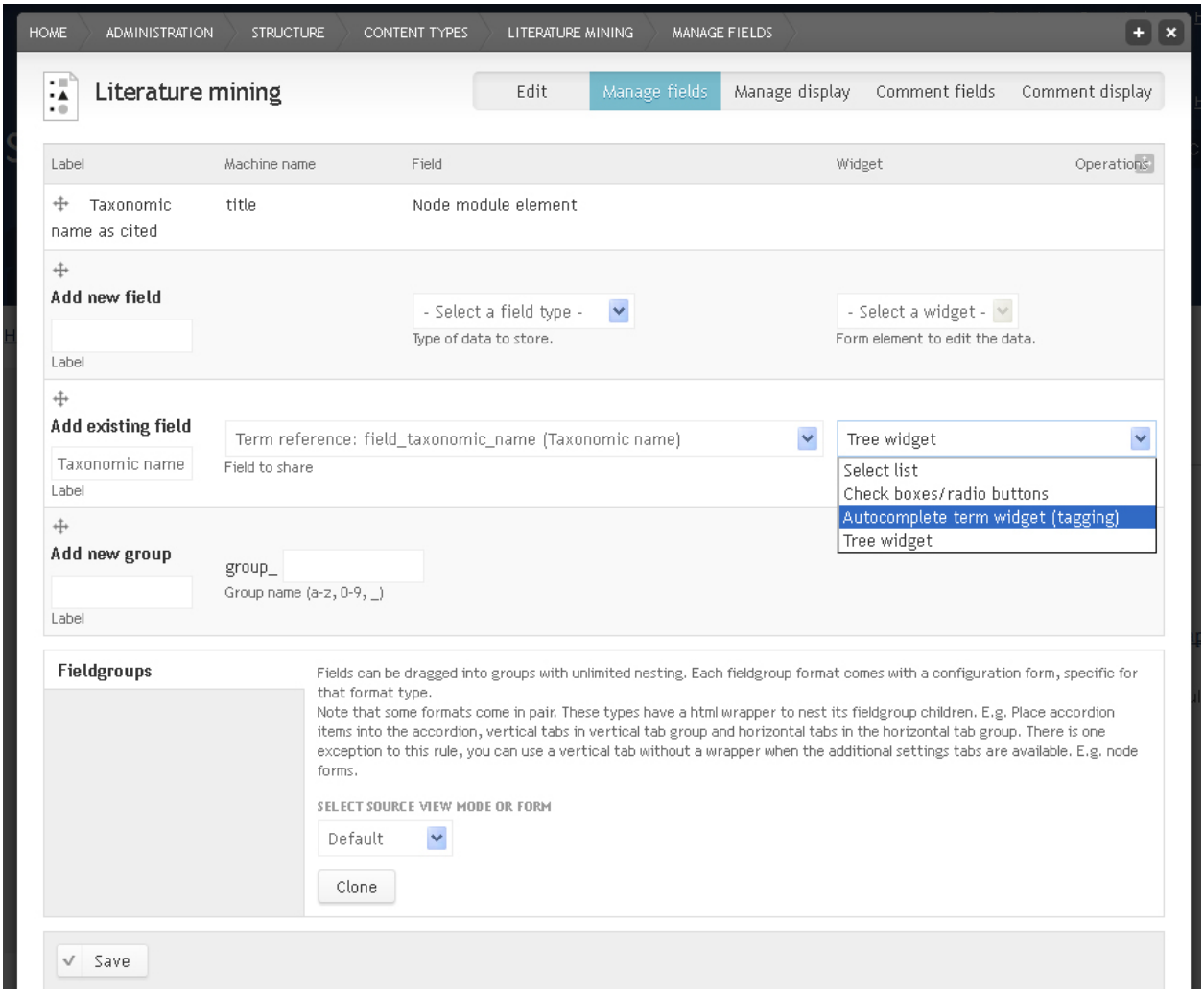
1.27.2 Managing fields

By default every new content type has a title and a body field. In this example the body field is not needed, so click on *delete* for this field.

Term reference fields

First we want to add a field that links to the biological classification, so that we can tag our new literature mining content to one or more taxonomic names.

Like with other content types, the *Taxonomic name* field should be an autocomplete field. A field like this is already present in several content types, so we don't need to create a new one, we can use the existing one. Because it links to taxonomy terms a field like this is called a *Term reference*.



1. Go to *Add existing field*. As *Label* enter "Taxonomic name"
2. In the *Field to share* drop down menu select *Term reference: field_taxonomic_name (Taxonomic name)* and in the *Form element to edit the data* drop down menu select *Autocomplete term widget (tagging)*
3. Click *Save*

NOTE: These existing fields are locked, so you will not be able to edit their settings (make them required, for example).

Node reference fields

Next we want to add a field that links to the biblio content type (References), so that we can select a biblio node. This field should be a dropdown menu. Again, a field like this is already present in other content types, so we can use the existing one. Because it links to a node in a different content type a field like this is called a *Node reference*

1. Go to *Add existing field*. As *Label* enter "Reference", in the *Field to share* drop down menu select *Node reference: field_reference (Reference)* and in the *Form element to edit the data* drop down menu select *Select list*
2. Click *Save*

Text fields

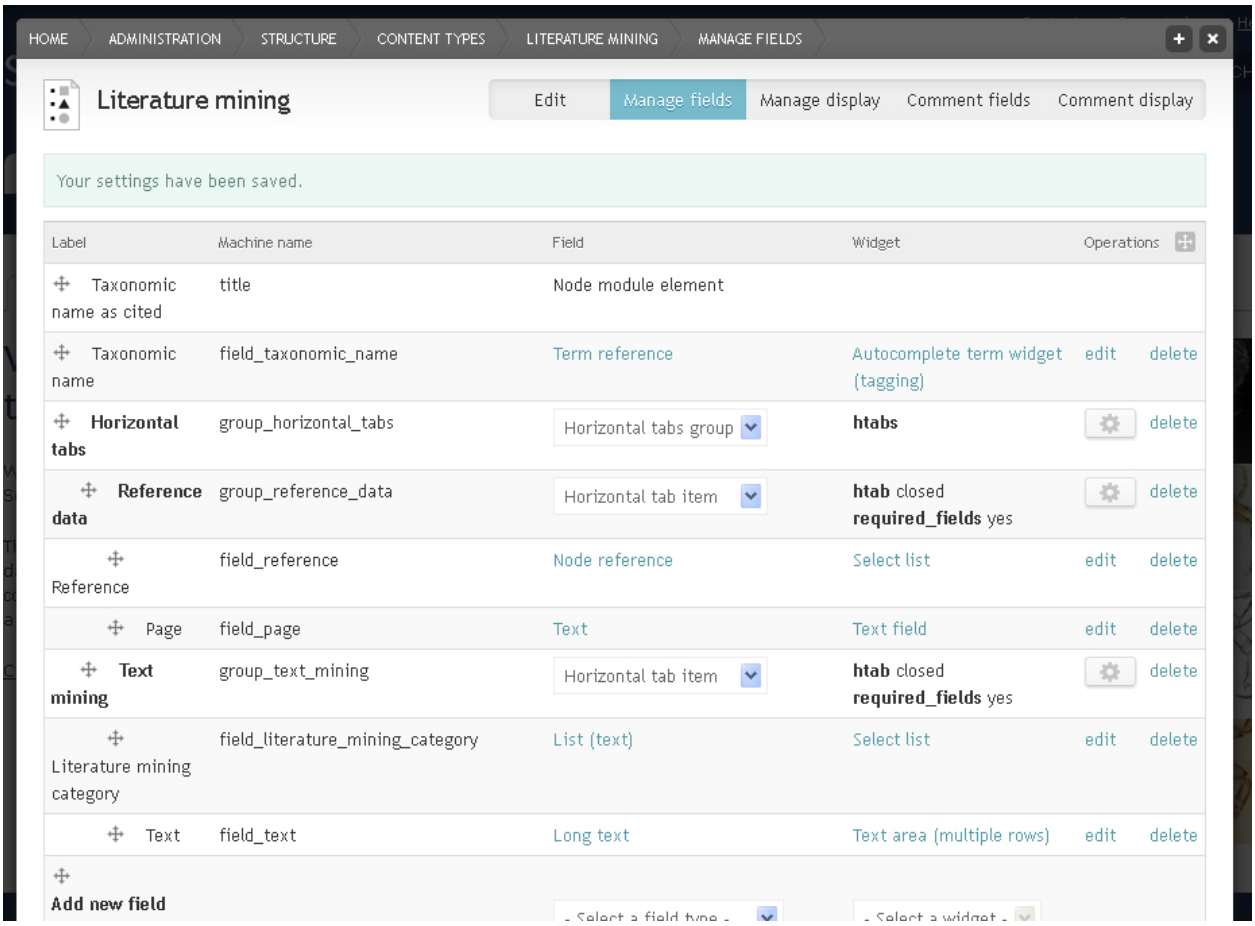
Next we want to add a field for the page number on which the taxon is cited in the reference. A page field doesn't exist, yet, so we need to create a new field. Since pages are numbers, we could use *Integer* as data type. However, in some cases we might want to add a range of pages and this would not be possible with "Integer", so instead it is better to use the "Text" data type, which is for text that is up to 255 characters long.

1. Go to *Add new field*. As *Label* enter "Page", in the *Type of data to store* drop down menu select *Text* and in the *Form element to edit the data* drop down menu select *Text field*
2. Click *Save*
3. Under *Field settings* enter "20" as *MAXIMUM LENGTH*. This should give plenty of space for adding the page number.

List fields

There are various options for adding keywords to our new content type. We can just link to the existing keywords on the site that are for example used for images. To do this we would add the existing "Term reference: Field_keywords (Keywords) field. We could also create a new non-biological vocabulary for our literature mining keywords and create a new term reference field linking to this vocabulary. With the right settings, new keywords can be added to this vocabulary by adding them to the literature mining node. Another option would be to create a list of literature mining categories to choose from and then enter additional information or keywords into a text field. We will do the latter now:

1. Go to *Add new field*. As *Label* enter "Literature mining category", in the *Type of data to store* drop down menu select *List (text)* and in the *Form element to edit the data* drop down menu select *Select list*
2. Click *Save*
3. In the *ALLOWED VALUES LIST* enter a few categories, e.g. *distribution, original name, type information*, one line each


HOME
ADMINISTRATION
STRUCTURE
CONTENT TYPES
LITERATURE MINING
MANAGE FIELDS
Literature mining
Edit
Manage fields
Manage display
Comment fields
Comment display
Your settings have been saved.
Label
Machine name
Field
Widget
Operations
Taxonomic name as cited
title
Node module element
Taxonomic name
field_taxonomic_name
Term reference
Autocomplete term widget (tagging)
edit
delete
Horizontal tabs
group_horizontal_tabs
Horizontal tabs group
htabs
delete
Reference data
group_reference_data
Horizontal tab item
htab closed required_fields yes
delete
Reference
field_reference
Node reference
Select list
edit
delete
Page
field_page
Text
Text field
edit
delete
Text mining
group_text_mining
Horizontal tab item
htab closed required_fields yes
delete
Literature mining category
field_literature_mining_category
List (text)
Select list
edit
delete
Text
field_text
Long text
Text area (multiple rows)
edit
delete
Add new field
- Select a field type -
- Select a widget -

4. Click *Save* and *Save* on the next page also

Long text fields

For adding extracts of the cited paper, we need a text field that can hold more information then just 255 characters. So we will use a 'Long text' field.

- Go to 'Add new field'. As 'Label' enter "Text", in the 'Type of data to store' drop down menu select "Long text" and in the 'Form element to edit the data' drop down menu select "Text area". Save and save again.
- As HELP TEXT enter "Enter keywords or text extracts from the mined paper" and under TEXT PROCESSING select "Filtered text", so that it is possible to use italics and other formatting. Save settings.

Groups

To facilitate the entering and viewing of fields, they can be sorted into groups. Groups can be shown as boxes around the fields (Fieldset) or for example as horizontal tabs in the view and edit mode. For the few fields we have in this content type groups are not really necessary, but we will add two anyway to demonstrate horizontal tabs. Each horizontal tab (*horizontal tab*) is a group and all tabs together also form a group (*horizontal tabs group*). First we need to create a horizontal tab group to which we then each *Horizontal tab*.

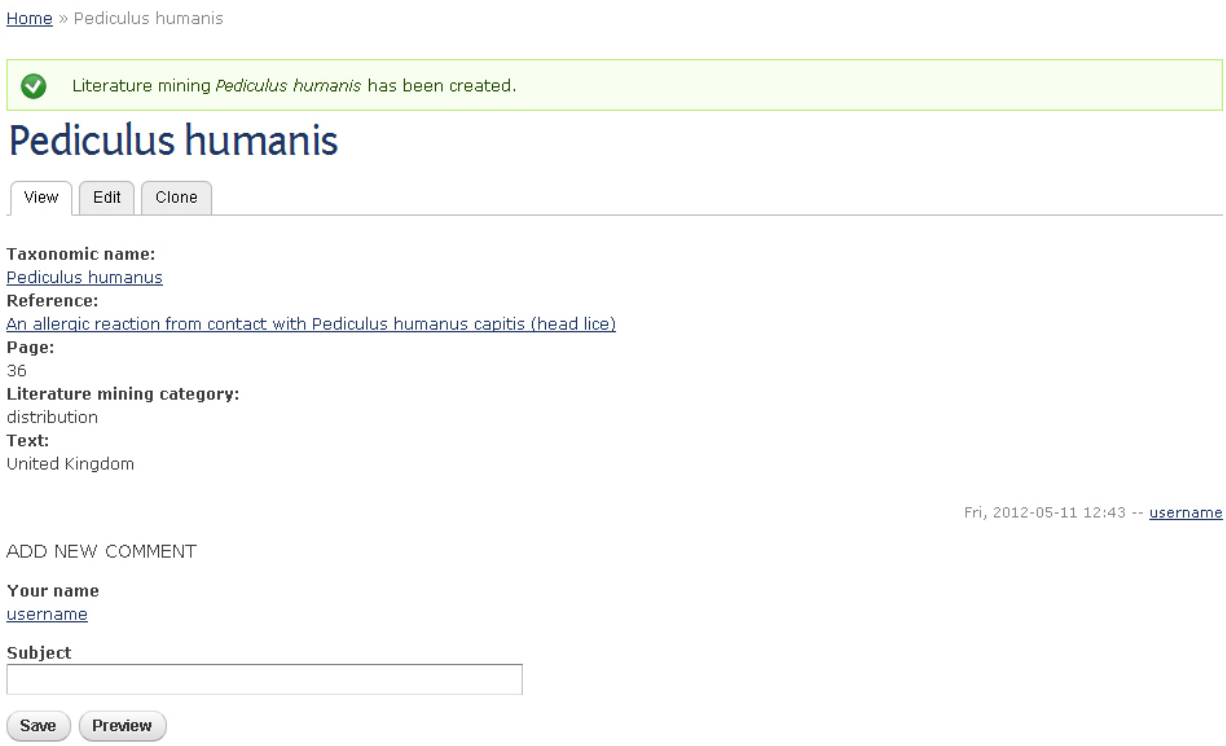
1. Go to *Add new group*. As *Label* enter "Horizontal tabs" and as *Group name* enter "horizontal_tabs"
2. In the drop down menu select *Horizontal tabs group*
3. Click *Save*
4. Go to *Add new group*. As *Label* enter "Reference data" and as *Group name* enter "reference_data"
5. In the drop down menu select *Horizontal tab*
6. Click *Save*
7. Drop and drag the *Reference* and the *Page* fields into the *Reference data* group
8. Click *Save*
9. Create another *horizontal tab* called "Text mining" and move the *Literature mining category* and *Text* fields into it
10. Click *Save*
11. Drag the *Reference data* and the *Text mining* groups into the *Horizontal tabs* group
12. Click *Save*

1.27.3 Create a new node

Check out how your new content type looks by adding a literature mining node.

From the *Admin menu* go to *Content* > *Literature mining* > *Add*

If you do this in a separate browser tab you can play around with changing the settings and seeing how this affects the view.



1.27.4 Managing display

The way the node is displayed can be changed under the *Manage display* tab. Two things can be changed: The position and presence of the label and the format of the field. The field format largely depends on the field type

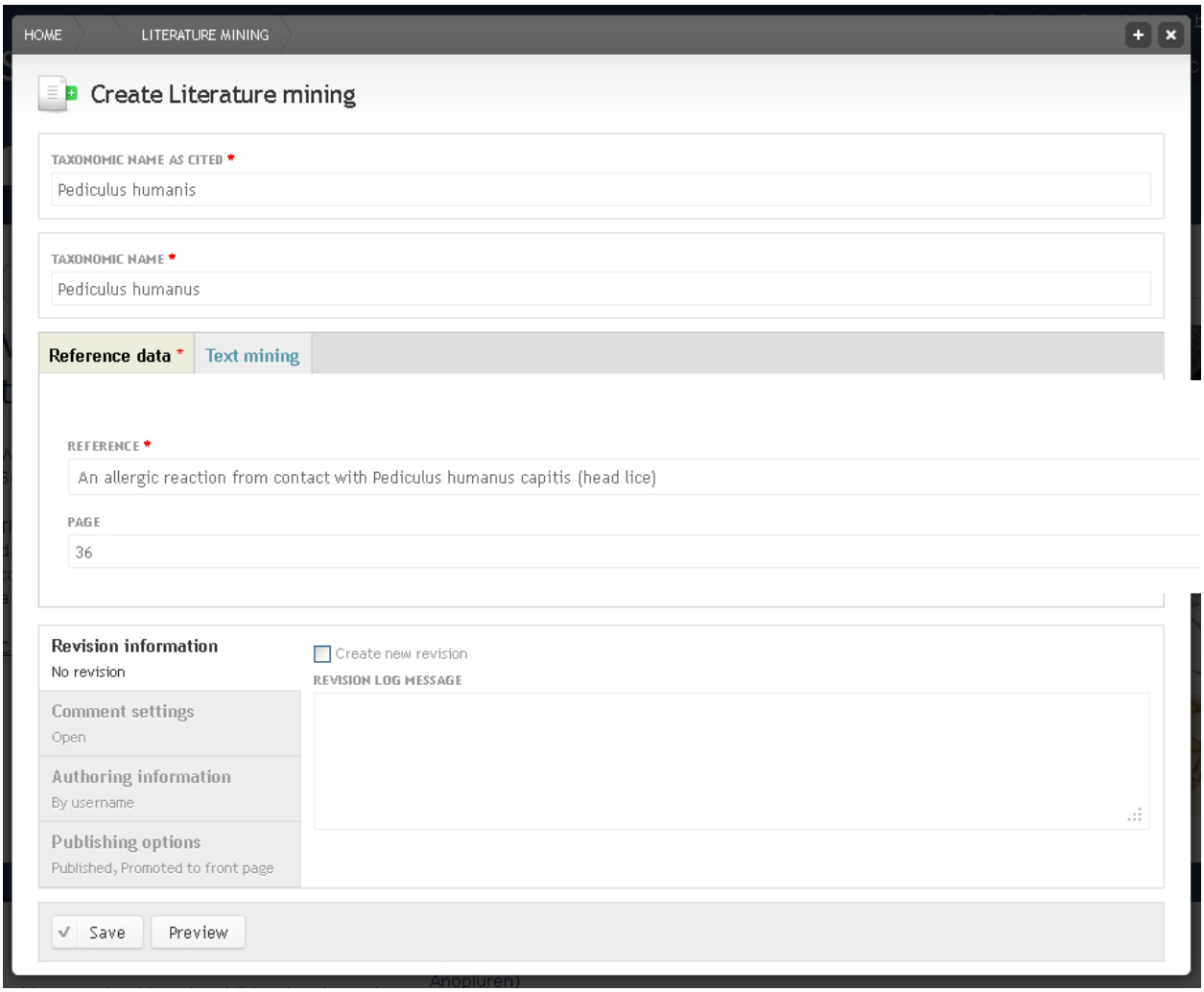
1. Change all the labels to "Inline" to save space and have a look at the format options for different field types but don't change any
2. Click *Save*

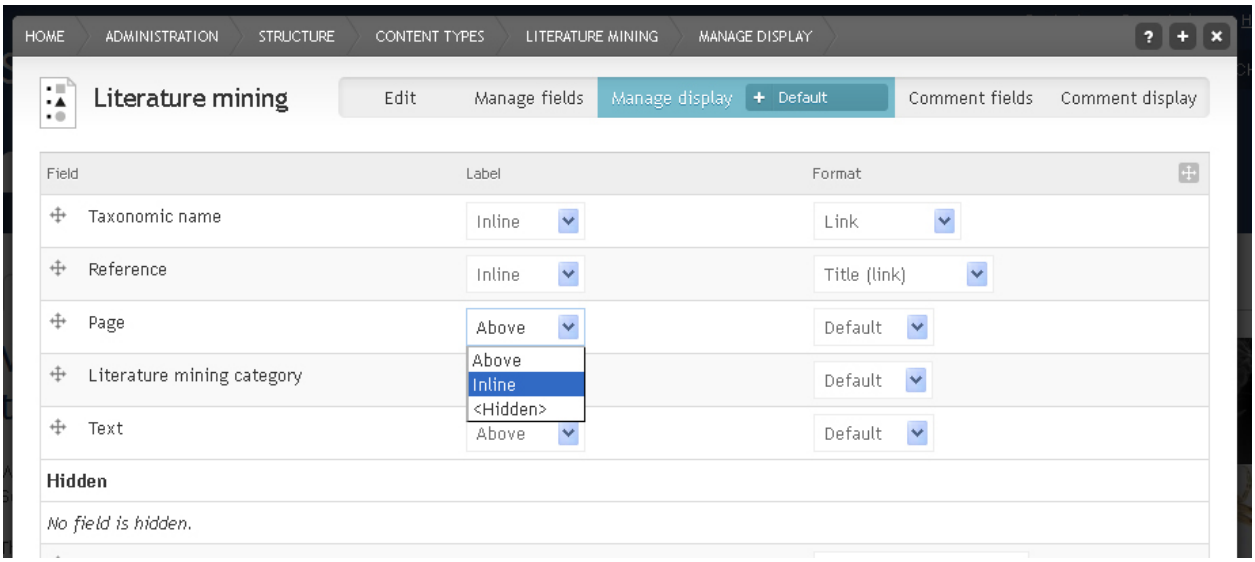
At the point where a new content type has been saved a menu item is added to the *Main menu*. By default this page just lists the titles of literature mining nodes with a link to the respective node. To improve this page and change it into, for example, a matrix, you need to edit the view. See *Adding and editing views* for more info

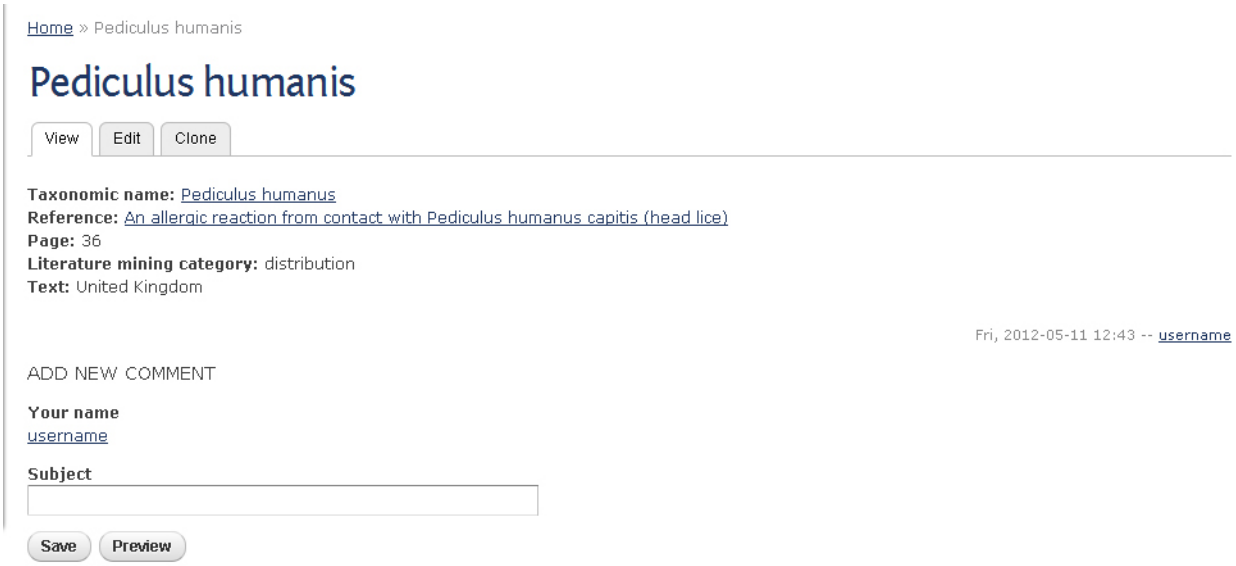
1.27.5 Menu

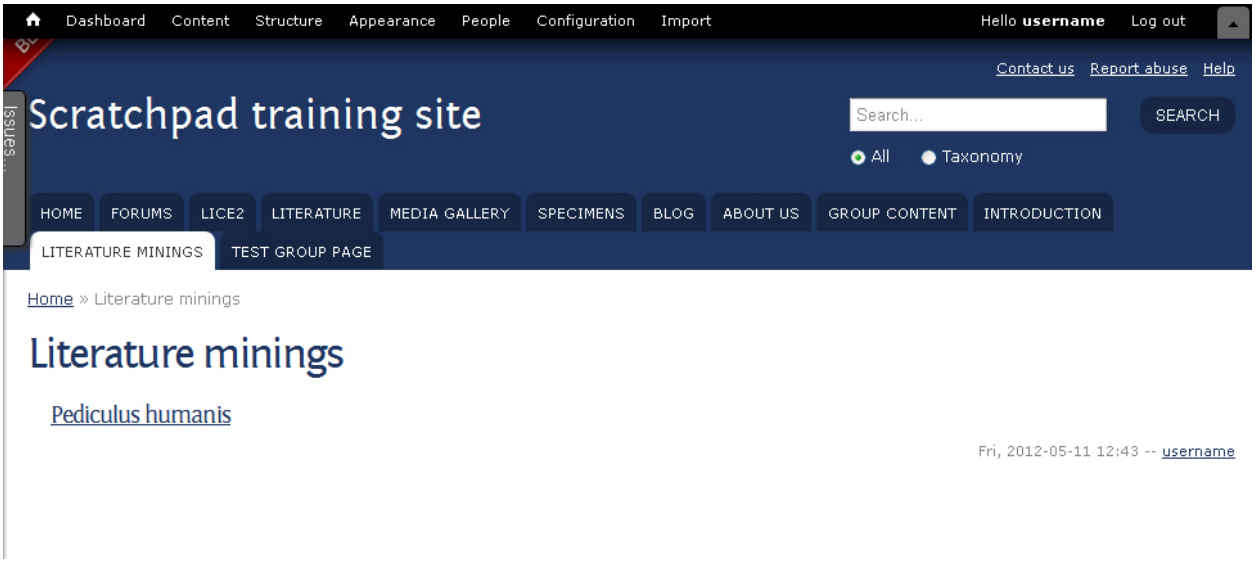
By default, new content types are added to the *Main menu*, with a view listing all the nodes. You can customise this view - see *Adding and editing views* for more information.

TIP: Scratchpads uses caching to speed up the sites, which does mean some menu items take a while to display. If you *Literature mining* menu item is not visible, go back into *Main menu* > *Structure* > *Content types* > *Literature mining* > *Edit* and click *Save* again without making any changes.


HOME
LITERATURE MINING
Create Literature mining
TAXONOMIC NAME AS CITED *
Pediculus humanis
TAXONOMIC NAME *
Pediculus humanus
Reference data *
Text mining
REFERENCE *
An allergic reaction from contact with Pediculus humanus capitis (head lice)
PAGE
36
Revision information
No revision
Create new revision
REVISION LOG MESSAGE
Comment settings
Open
Authoring information
By username
Publishing options
Published, Promoted to front page
Save
Preview


HOME
ADMINISTRATION
STRUCTURE
CONTENT TYPES
LITERATURE MINING
MANAGE DISPLAY
Literature mining
Edit
Manage fields
Manage display
Default
Comment fields
Comment display
Field
Label
Format
Taxonomic name
Inline
Link
Reference
Inline
Title (link)
Page
Above
Default
Above
Inline
<Hidden>
Literature mining category
Default
Text
Above
Default
Hidden
No field is hidden.


Home » Pediculus humanis
Pediculus humanis
View
Edit
Clone
Taxonomic name: Pediculus humanus
Reference: An allergic reaction from contact with Pediculus humanus capitis (head lice)
Page: 36
Literature mining category: distribution
Text: United Kingdom
Fri, 2012-05-11 12:43 -- username
ADD NEW COMMENT
Your name
username
Subject
Save
Preview


Dashboard
Content
Structure
Appearance
People
Configuration
Import
Hello username
Log out
Contact us
Report abuse
Help
Scratchpad training site
Search...
SEARCH
All
Taxonomy
HOME
FORUMS
LICE2
LITERATURE
MEDIA GALLERY
SPECIMENS
BLOG
ABOUT US
GROUP CONTENT
INTRODUCTION
LITERATURE MININGS
TEST GROUP PAGE
Home » Literature minings
Literature minings
Pediculus humanis
Fri, 2012-05-11 12:43 -- username

1.28 Phylogenetic tree

Scratchpads provide a custom field formatter for displaying NeXML as phylogenetic trees. NeXML is an exchange standard for representing phyloinformatic data.

*This field formatter can be added to existing or custom content types - in this example we'll use a custom *Tree* content type.**

1.28.1 Creating a new 'Tree' Content Type

1. From the *Admin menu* go to *Structure*
2. Click *Content Types* then *Add content type*
3. Enter a *TITLE*, e.g. "Tree" and click *Save and add fields*
4. In the section *Add new field* provide a label, e.g. "Tree"
5. Select the *Field type* "Long Text" then click *Save*
6. Under *Manage display* you should set the *Format* to Newick/NeXML tree
7. Under *Display type* choose from either *Rectangular* or *Circular*
8. Click the *Save* button at the bottom left

1.28.2 Changing Phylogenetic Tree Display Options

1. From the *Admin menu* go to *Structure*
2. Click *Content Types* then *manage display* for your tree content type
3. Set the *Display type* to either *Rectangular* or *Circular*

1.28.3 Creating a new Phylogenetic Tree

From the *Admin menu* go to *Content* > *Tree* > *Add*

In the *Tree* field, enter some valid neXML data. For more information and some example NeXML files, see NeXML Github.

1.29 Edit content

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

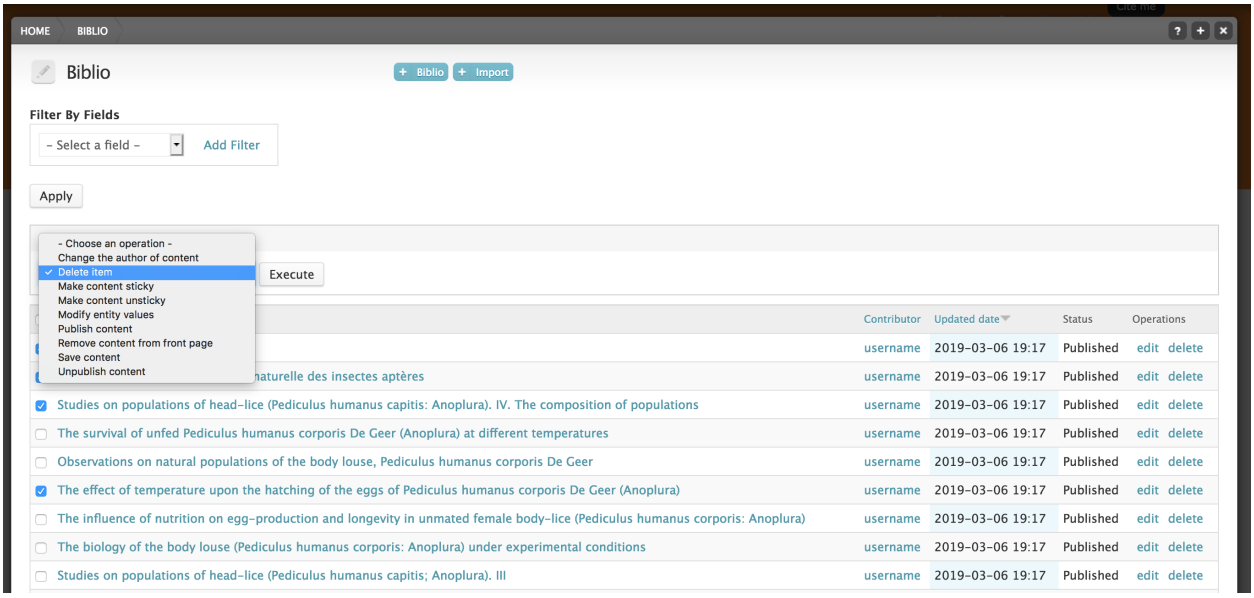
1.29.1 Edit node

1. When viewing any editable *Node*, an *Edit* tab will be available.

2. Click the *Edit* tab to open the edit overlay form.

1.29.2 Bulk operations

1. Within *Admin menu*, select *Content*
2. Next to the content type, click *View* link.
3. This page lists all the content of that particular type. At the top of the page you can apply filters to search for particular items of content.
4. Under *Operations* you can select an action to run against these nodes, including:
   - Change the author of content
   - Delete item
   - Make content sticky
   - Make content unsticky
   - Modify entity values
   - Remove content from front page
   - Unpublish content
5. Next to each content row, is a checkbox. Select the rows you wish to run the bulk operation against.

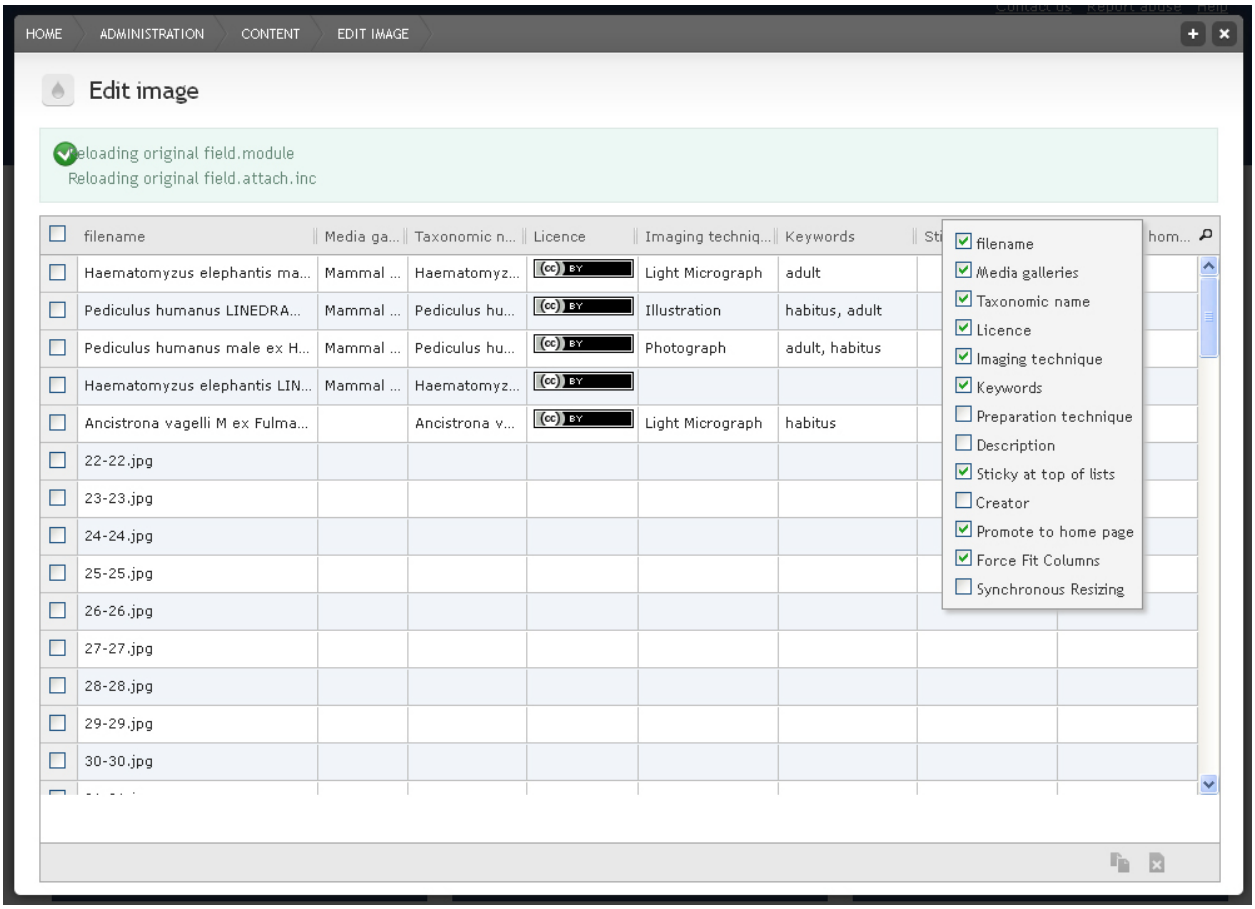


6. Select *Execute*

1.29.3 Grid editor

1. Click *Content* in the *Admin menu*
2. Click *Grid* next to the *content type* you wish to edit

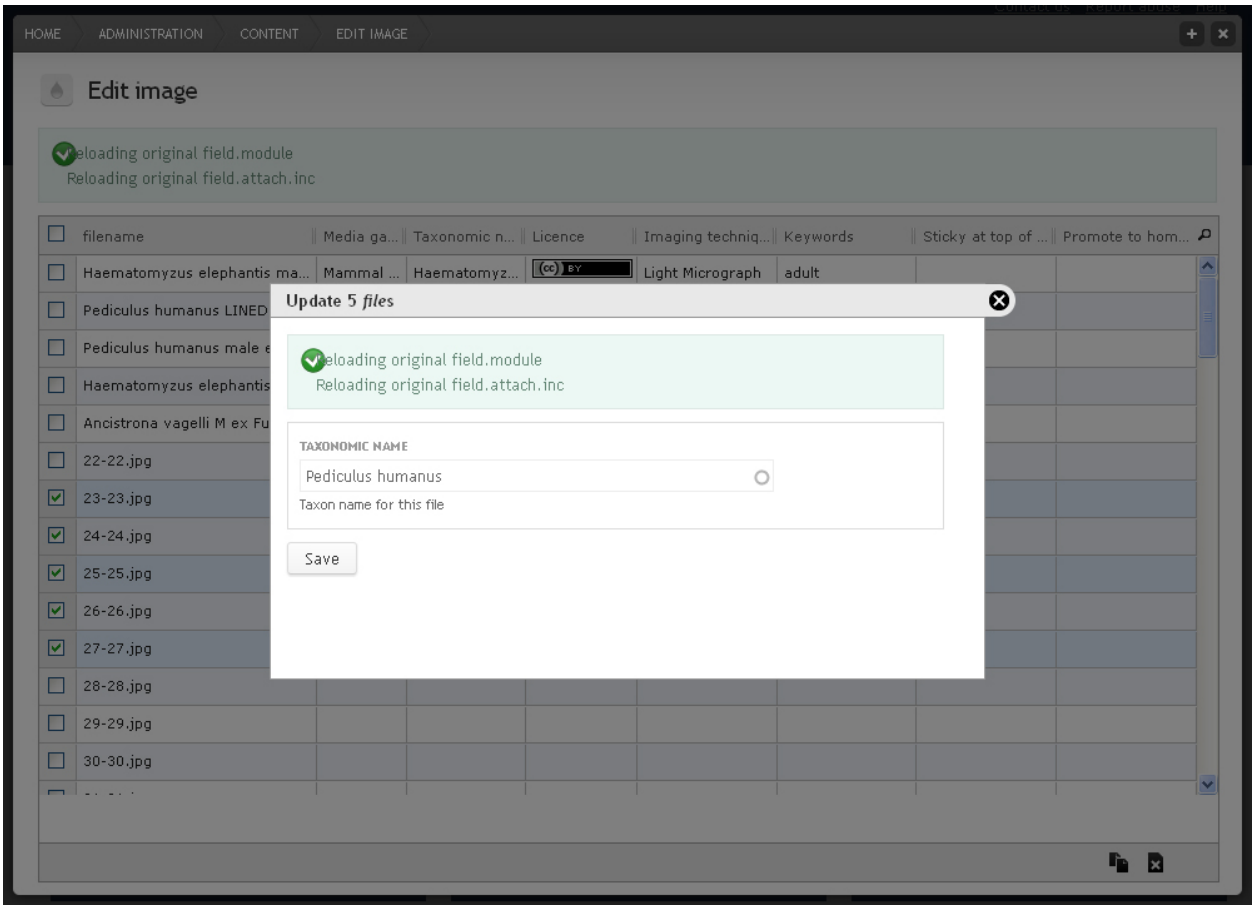
3. You will see a matrix with a row for each node and columns for selected fields of this content type. The rows are ordered chronologically, with the most recent nodes at the top



4. 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 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.
5. To edit contents of a single cell click into the cell, edit and click *Save*
6. 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 click *Save*. The content of this field will change for all selected nodes
7. 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.
8. At the bottom of the matrix there are icons for cloning (creating a duplicate entry), deleting and undoing.

1.30 Revisions

Scratchpads can keep track of the changes made to a node of a content type. These changes are stored as different versions of the node called revisions. Revisions can be very useful when data are updated by different authors.


HOME
ADMINISTRATION
CONTENT
EDIT IMAGE
Edit image
Reloading original field.module
Reloading original field.attach.inc
filename
Media ga...
Taxonomic n...
Licence
Imaging techniq...
Keywords
Sticky at top of ...
Promote to hom...
Haematomyzus elephantis ma...
Mammal ...
Haematomyz...
Light Micrograph
adult
Pediculus humanus LINED
Pediculus humanus male
Haematomyzus elephantis
Ancistrona vagelli M ex Fu
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
Update 5 files
Reloading original field.module
Reloading original field.attach.inc
TAXONOMIC NAME
Pediculus humanus
Taxon name for this file
Save

1.30.1 Enabling Revisions for content types

1. From the *Admin bar* go to *Structure* > *Content types*
2. Click *Edit* next to the content type you wish to enable or disable revisions for
3. Click on *Publishing options* and select *Create new revision*
4. Click *Save Content type*

If *Create new revision* is specified for a content type, every edit will, by default, create a new version of the page.

This can be overridden in the *Revision information* on a node - along with setting a more informative revision log message.

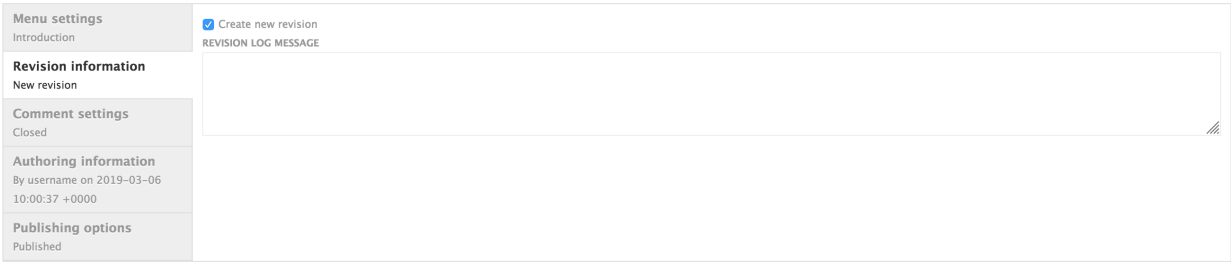
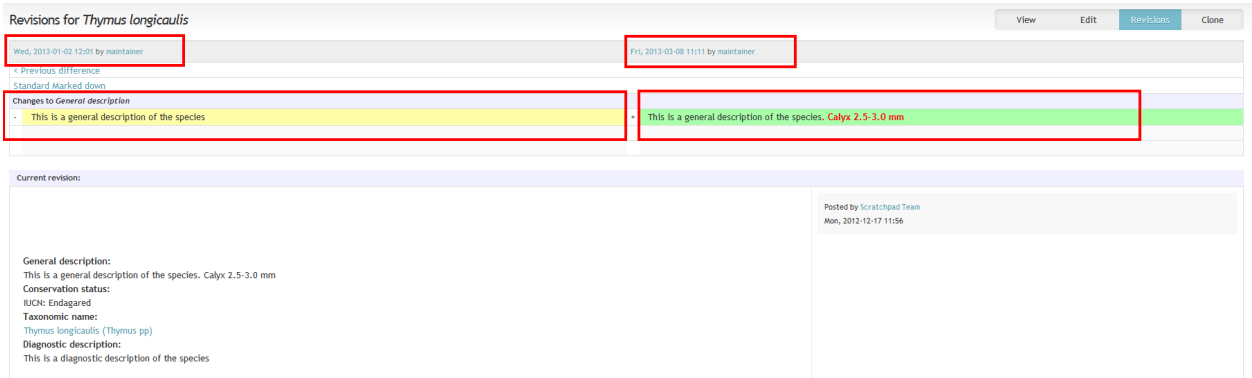


Fig. 7: Node form Revision information

1.30.2 Comparing Revisions

Once you have created a new revision of a node in the content type you can compare their differences:

1. Locate and view the node you wish to see the revisions for.
2. Click on *Revisions* tab
3. Select the revisions you wish to compare and click *Compare*



Note: If a field accepts HTML input, it might be easiest to view changed without HTML tags - to remove the HTML tags click on *Marked down*

1.31 Ordering content

There are two methods to control the order of nodes. *Weight* allows you to specify a weight for each node, so those with a lesser (lighter) weight float to the top of lists. The *Sticky at top of lists* setting is a simpler setting, where nodes can be 'promoted' to the top of a list*

1.31.1 Weight

Weight settings allow you to finely control the order of content. For example, if you have many taxon descriptions, you may want to control the order that they appear on the *Descriptions* tab on a taxon page.

Enable Weight

1. From the *Admin menu* go to *Structure* > *Content types*
2. Click *edit* next to the content type that you want to enable weight settings for (e.g. *Taxon Description*)
3. Click 'Weight Settings" from the bottom left menu
4. Select *YES* under *ENABLE* to activate weight settings for that content type
5. Click *Save content type*

Set weight

Either *Add* or *Edit* an item of content for the node type on which you have enabled setting weight.

A new weight option is available in the node additional options.

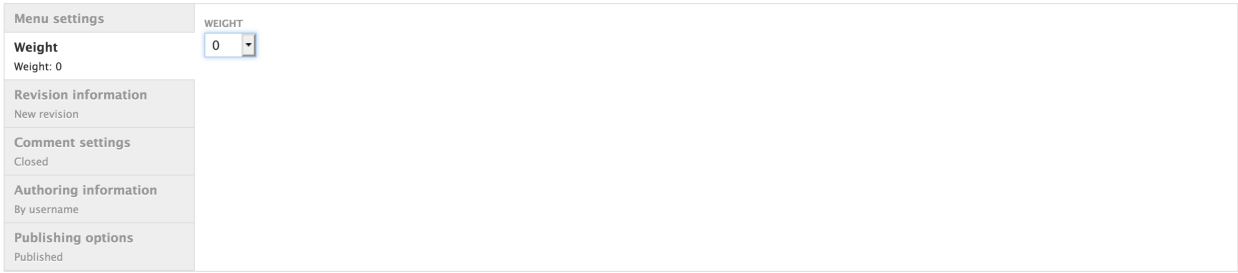


Fig. 8: Node edit form showing weight selection form

1.31.2 Sticky at top of lists

The *Sticky at top of lists* setting is a simpler setting to control node order. A node with *Sticky at top of lists* selected will appear at the top of all lists in which it appears.

For example, if you had multiple taxon descriptions for a single taxon and enabled *Sticky at top of lists* for one of these, it would be this one that appears on the taxon *Overview* page and would be first on the 'Descriptions" page.

Set stickiness

Stickiness is enabled by default on all node types, and is available under publishing options on the *Node* edit form.

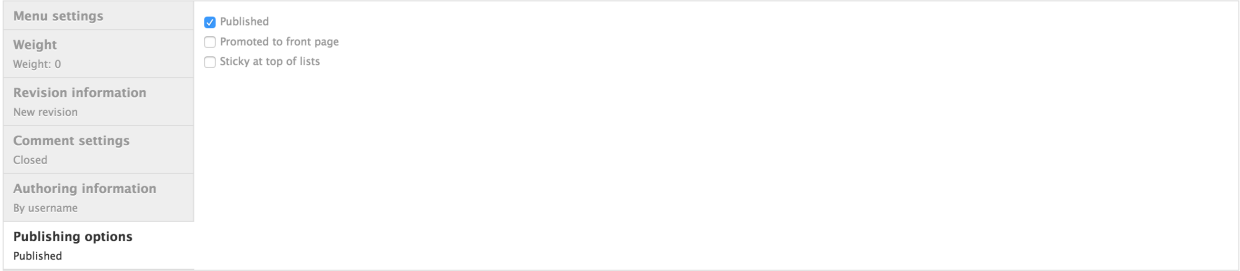
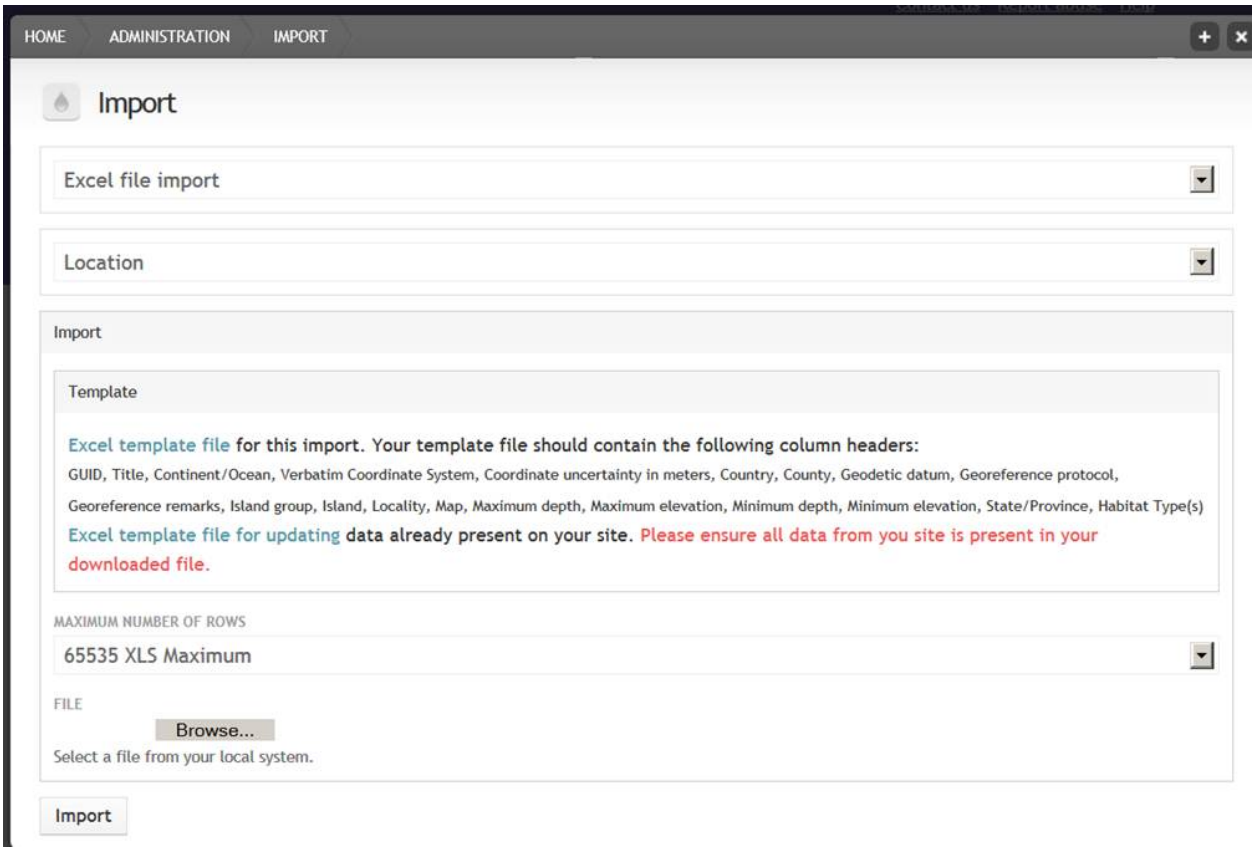


Fig. 9: Node edit form with "Sticky at top of lists" checkbox

1.32 Import content

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.

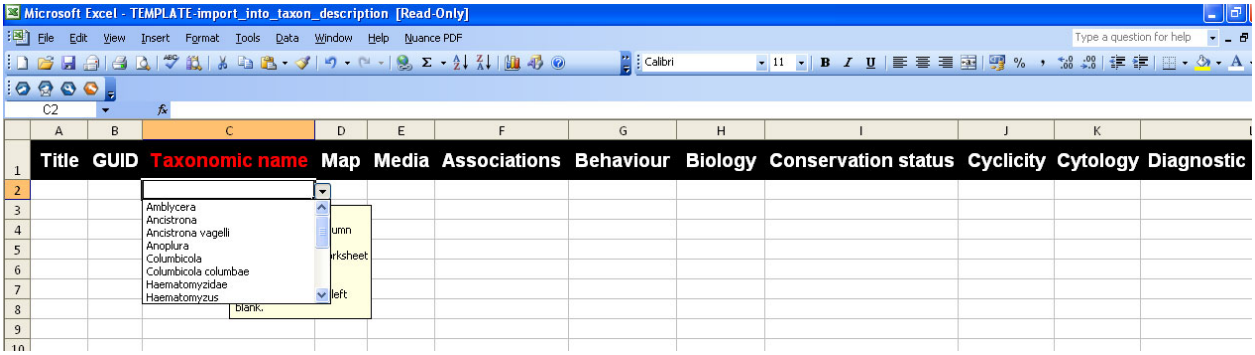
To help prepare your data in the correct format you can export a template Excel file that includes all the fields and any pre-defined field values for the respective content type. Populate this file with your data and import into the Scratchpad.



1.32.1 Creating the template file

1. From the *Admin menu* go to *Content*

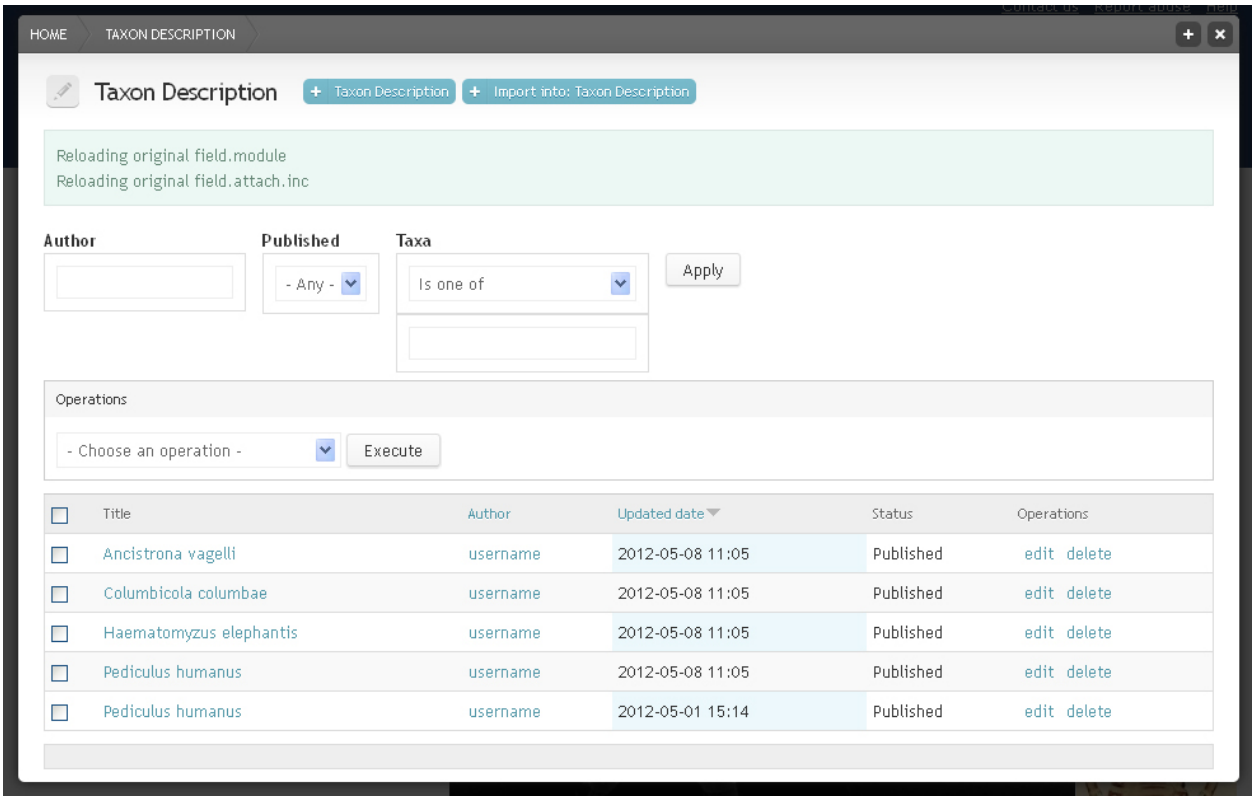
2. Click on *Import* next to the content type you want to create the template file for, e.g. Taxon description
3. Click on the *Download* link and open the file in Excel. You will see the different Scratchpad fields as column headers. Required fields are shown in Red



4. Fill the template file with your data and save

1.32.2 Create the pre-populated template file

1. From the *Admin menu* go to *Content*
2. Click *Import* next to the content type into which you want to import data, e.g. Taxon description.



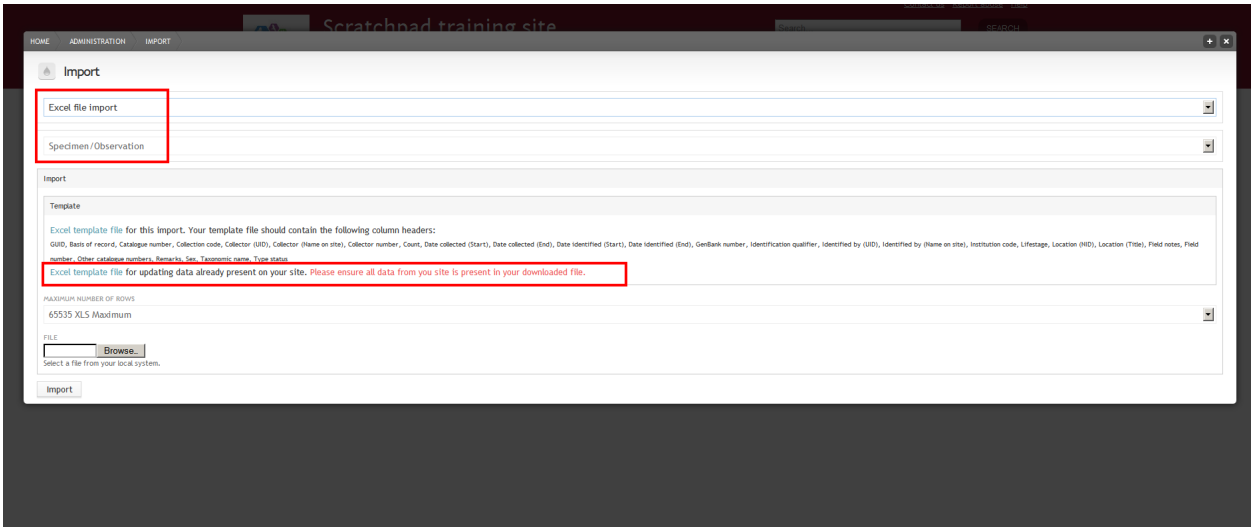
3. From the *Maximum number of rows* drop down menu select the option that best matches your file. (e.g. for a excel file with 3500 rows, choose 5000)
4. *Browse* for the file and click on the *Import* button

5. 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

1.32.3 Other Important 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".

1.33 Import specimens



1.33.1 Instructions

Excel file imports can be used either for creating new nodes or for updating existing. Please see the *Import content* page for more general info.

To download the template file (for new data or for updating your data)

- Go to Import > Nodes > Excel file import
- Choose specimen/observation from the second drop-down menu
- Choose the template file you wish to work on (choose the first for creating new data or the second for changing or amending existing scratchpad data)
- Open the downloaded excel file in your computer and edit it

Complete the columns as follows:

- **GUID**:

Use Global Unique Identifiers for each one of your localities. These identifiers will not show up to users. Use complex combinations like DK-2012-05-20-1001

- *'Basis of Record*:

This designates the type of record you enter. Please choose from: *Fossil Specimen, Human Observation, Living Specimen,Machine Observation, Moving Image,Other Specimen, Preserved Specimen, Sound Recording, Still Image*. Use *Preserved specimen* for herbarium or zoological museum specimens. This is a required field.

- **Catalogue number**:

Provide the institution number of the specimen (accession number). This is a required field.

- **Collection code**:

Provide the institution's code for the collection in which the specimen is kept. This field is not to be misinterpreted as the institution code which is entered in a different field. This is a required field.

- **Collector (UID)**:

The Unique identification number of the collector as stored in your Scratchpad. Please note that collectors should first have been registered as persons in your Scratchpad. Leave empty if you do not know this number

- **Collector (Name on Site)**:

The name of the collector as it is registered in your Scratchpad. If you filled in the Collector (UID) you do not have to enter anything here.

- **Collector number**:

The collector's number for this specific entry.

- **Count**:

The number of individuals present in the lot or container. Not to be used for observations

- **Date collected (Start)**:

The verbatim original representation of the starting date (and time) information for the collecting event. Enter dates as follows: for 25 January 1979 enter 1979-01-25

- **Date collected (End)**:

The verbatim original representation of the end date (and time) information for the collecting event. Enter dates as follows: for 25 January 1979 enter 1979-01-25

- **Date identified (End)**:

Date the specimen was taxonomically identified. Enter dates as follows: for 25 January 1979 enter 1979-01-25

- **GenBank number**:

GenBank Accession number(s) associated with the specimen referred to by the catalogued object.

- **Identification qualifier**:

A brief phrase or a standard term ("cf.", "aff.") to qualify the identification of the organism when doubts have arisen as to its taxonomic identity (determination). Example: 1) For the determination "Quercus aff. agrifolia var. oxyadenia", the entry in this field would be "aff. agrifolia var. oxyadenia"

- **Identified by (UID)**:

The Unique identification number of the identifier (det.) as stored in your Scratchpad. Please note that identifiers should first have been registered as persons in your Scratchpad. Leave empty if you do not know this number.

- **Identified by (Name on Site)**:

The name of the identifier (det.) as it is registered in your Scratchpad. If you filled in the Collector (UID) you do not have to enter anything here.

- **Institution code**:

The institution code that holds the specimen referred to by the catalogued object. This is a required field.

- **Lifestage**:

The age class or life stage of the specimen

- **Location (NID)**:

The identification number of the location the specimen was collected from or the observation made in. You can find this number by browsing through your location list in your Scratchpad. Please note that entering the locations used in this field is a pre-requirement. You can see the permitted values for this field on the *permittedValues* tab of the downloaded excel file.

- **Location (title)**:

The title of the location the specimen was collected from or the observation made in. If you entered data in the *Location (NID)* field you should not enter anything here. You can see the permitted values for this field on the *permittedValues* tab of the downloaded excel file.

- **Field Notes**:

Field notes associated with the specimen or observation

- **Field number**:

An identifier given to the event in the field. Often serves as a link between field notes and the Event.

- **Other catalogue numbers**:

A list (concatenated and separated) of previous or alternate fully qualified catalogue numbers or other human-used identifiers for the same Occurrence, whether in the current or any other data set or collection.

- **Remarks**:

Comments or notes about the Event.

- **Sex**:

The sex of the specimen. Permitted values:Female, Hermaphrodite, Indeterminate, Male, Multiple, Transitional, Undetermined, Unknown

- **Taxonomic names**:

The taxonomic name the specimen or observation was identified as. Use a term from your existing biological vocabularies. Check permitted values on the same column of the *PermittedValues* tab in the downloaded excel file.

- **Type status**:

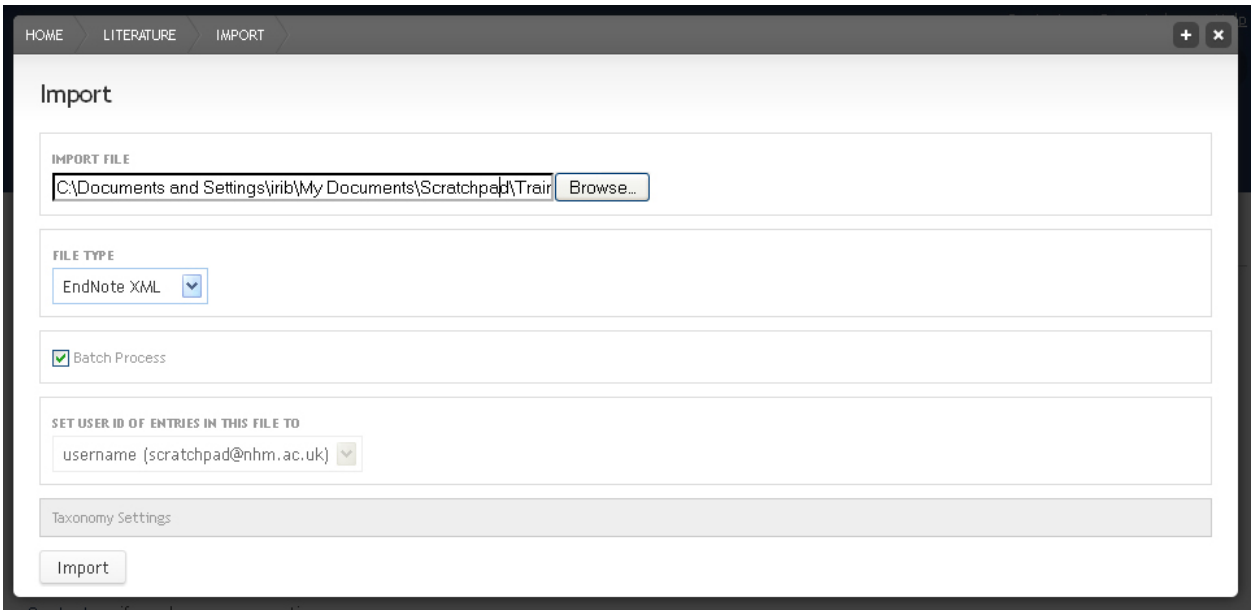
Indicates the kind of nomenclatural type that a specimen represents. Permitted values: Holotype, Isotype, Lectotype, Neotype, Nontype, Not Provided, Paralectotype, Paratype, Syntype

1.34 Import literature

You can import a variety of reference data into your Scratchpad, including:

- *BibTex*
- Endnote XML
- MARC
- Pubmed ID List
- Pubmed XML
- RIS

1. Click *Import* in the *Admin menu* and select "Nodes: Biblio file import".
2. Browse for the file and select the FILE TYPE.



3. Import.
4. Once the import has completed, a status message will show how many literature records have been created.
5. To view the literature references, in the *Admin menu* go to *Content* > *Biblio* > *View*

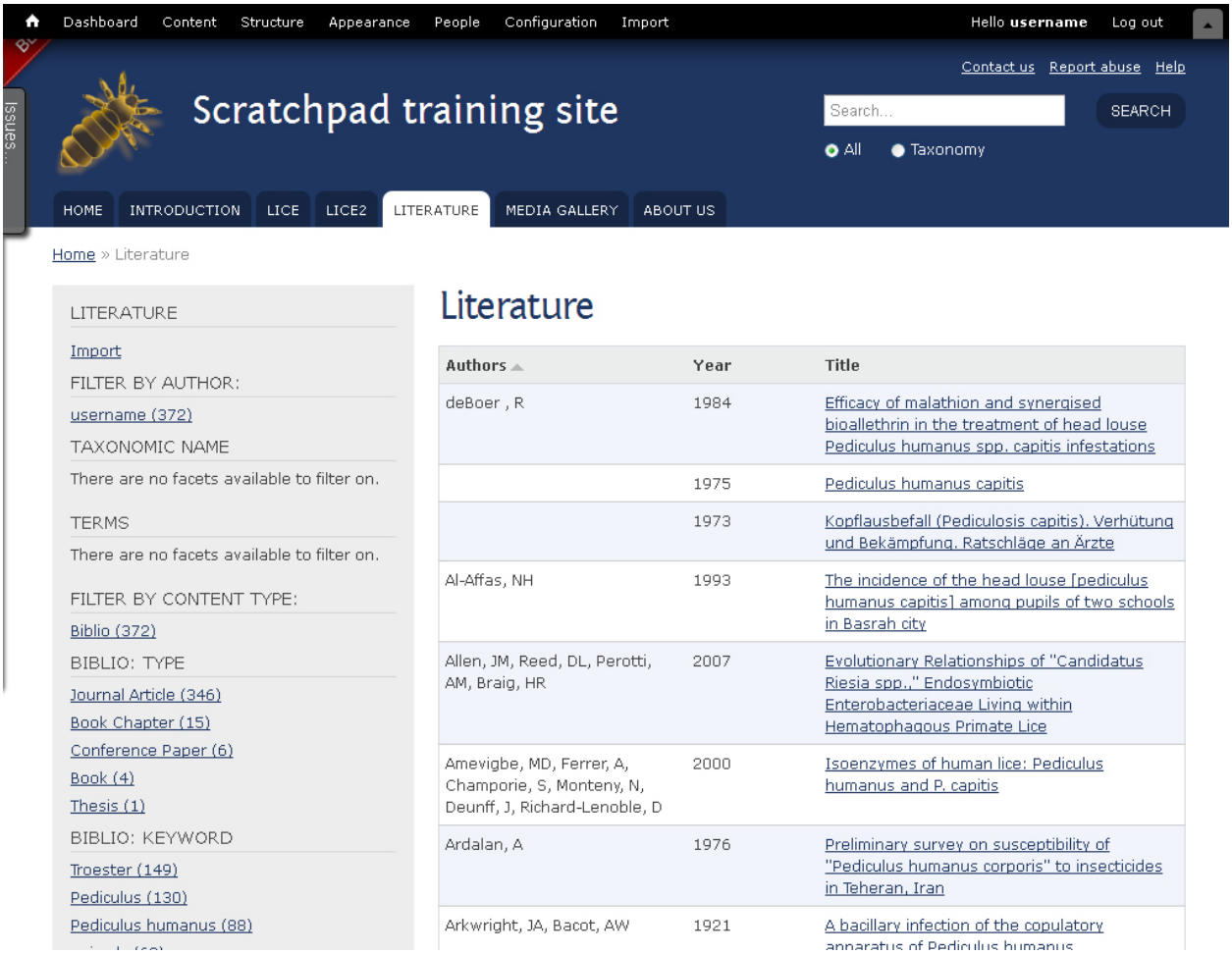
1.34.1 Troubleshooting

If the new records are missing when you click on *Literature* in the *Main menu* please give the system a few minuted to catch up. It needs to index all the new new references which can take a little time.

1.35 Import taxon descriptions

Excel file imports can be used either for creating new nodes or for updating existing. Please see the *Import content* page for more general info.

To download the template file (for new data or for updating your data)


Dashboard
Content
Structure
Appearance
People
Configuration
Import
Hello username
Log out
Contact us
Report abuse
Help
Scratchpad training site
Search...
SEARCH
All
Taxonomy
HOME
INTRODUCTION
LICE
LICE2
LITERATURE
MEDIA GALLERY
ABOUT US
Home » Literature
LITERATURE
Import
FILTER BY AUTHOR:
username (372)
TAXONOMIC NAME
There are no facets available to filter on.
TERMS
There are no facets available to filter on.
FILTER BY CONTENT TYPE:
Biblio (372)
BIBLIO: TYPE
Journal Article (346)
Book Chapter (15)
Conference Paper (6)
Book (4)
Thesis (1)
BIBLIO: KEYWORD
Troester (149)
Pediculus (130)
Pediculus humanus (88)
Literature
Authors
Year
Title
deBoer , R
1984
Efficacy of malathion and synergised bioallethrin 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
Amevigbe, MD, Ferrer, A, Champorie, S, Monteny, N, Deunff, 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

1. Go to Import > Nodes > Excel file import
2. Choose taxon description from the second drop-down menu
3. Choose the template file you wish to work on (choose the first for creating new data or the second for changing or amending existing scratchpad data)
4. Open the downloaded excel file in your computer and edit it

Complete the columns as follows:

- **GUID**:

Use Global Unique Identifiers for each one of your taxon descriptions. These identifiers will not be visible to users. Use complex combinations like TH-SIB-2012-001

- **Taxonomic name (Name)**:

Use the taxonomic name from your taxonomies the description refers to. The permitted values of this filed are located in column B of the PermittedValues tab of your downloaded Excel file. This is a required field.

- **Taxonomic name (TID)**:

Instead of typing the taxonomic name the corresponding Term ID (TID) can be used to identify a term in one of the taxonomies. TIDs are visible under the taxon name in the edit view of taxonomies.

- **Taxonomic name (GUID)**:

Instead of typing the taxonomic name the corresponding GUID can be used to identify a term in one of the taxonomies. Taxonomic names' GUIDs are visible under the taxon name in the edit view of taxonomies.

- **Map**:

You can set the geographic distribution of a taxon using specific values in this field.

1. To set distribution as predefined map polygon:
    1. Use the LAT/LONG set of coordinates of each of the points that constitute your polygon in WGS84. Separate LAT and LONG with a space and each set with a comma.
    2. Put your coordinates between the following strings *POLYGON:POLYGON((* set of coordinates *))*

For example to set a polygon distribution defined by the following points *27.42 44.65,17.66 39.36,20.30 36.80,24.25 34.45,27.33 36.31,29.79 37.85,27.42 44.65* you should put in the cell the following string *POLYGON:POLYGON((27.42 44.65,17.66 39.36,20.30 36.80,24.25 34.45,27.33 36.31,29.79 37.85,27.42 44.65))*

1. To set distribution as geographical or administrative units:
    1. Use the *REGION:* prefix followed by the number of geographical unit according to TDWG controlled vocabulary on geographic regions
    2. To select a Level 1 region use the *REGION:* prefix followed by the number of continent (e.g. REGION:2)
    3. To select a Level 2 region use the *REGION:* prefix followed by the number of continent and number of sub-continent (e.g. REGION:1:13)
    4. To select a Level 3 region use the *REGION:* prefix followed by the three letter alphabetical code of the country or state (e.g. for Spain REGION:SPA)
    5. To select a Level 4 region use the *REGION:* prefix followed by the hyphenated
    6. To set multiple regions of distribution for a taxon you must separate each *REGION:...* with a line break in the cell. To enter line breaks use Alt+Enter.

- **Associations**:

Descriptions and lists of taxa that interact with the subject taxon. Includes explicit reference to the kind of ecological interaction: Predator/prey; host/parasite, pollinators, symbiosis, mutualism, commensalism; hybridisation etc.

- **Behaviour**:

Description of behaviour and behaviour patterns of an organism, including actions and reactions of organism in relation to its biotic and abiotic environment. Includes communication, perception, modes and mechanisms of locomotion, as well as long term strategies (except mating and reproductive strategies, covered under reproduction).

- **Biology**:

. An account of the biology of the taxon. E.g. behavior, reproduction, dispersal

- **Conservation status**:

A description of the likelihood of the species becoming extinct in the present day or in the near future. Population size is treated under Population Biology, and trends in population sizes are treated under Trends. However, this is the preferred element if an object includes all of these things and details about conservation listings.

- **Cyclicity**:

Description of biorhythms, whether on the scale of seconds, hours, days, or seasons. Those states or conditions characterised by regular repetition in time. Could also cover phenomena such as chewing rates. Life cycles are treated in the Life Cycle term. Seasonal migration and reproduction are usually treated separately.

- **Cytology**:

Cell biology: formation, structure, organelles, and function of cells.

- **Diagnostic description**:

Lists the characters that distinguish this taxon from its closest relatives.

- **Diseases**:

Description of diseases that the organism is subject to. Disease-causing organisms can also be listed under associations.

- **Dispersal**:

Description of the methods, circumstances, and timing of dispersal.

- **Distribution**:

Covers ranges, e.g., a global range, or a narrower one; may be biogeographical, political or other (e.g., managed areas like conservencies); endemism; native or exotic; ref Darwin Core Geospatial extension. Does not include altitudinal distribution.

- **Ecology**:

An overview of ecological aspects of the taxon.

- **Evolution**:

Description of the evolution of the taxon.

- **General description**:

A comprehensive description of the characteristics of the taxon. To be used primarily when many of the subject categories are treated together in one object, but at length. Taxon biology is to be used if a brief summary.

- **Genetics**:

Information on the genetics of the taxon, including karyotypes, barcoding status, whole genome sequencing status, ploidy.

- **Growth**:

Description of growth rates, allometries, parameters known to be predictive, morphometrics. Can also include hypotheses of paedomorphy or neoteny, etc.

- **Habitat**:

Includes realm (e.g Terrestrial etc) and climatic information (e.g Boreal); also includes requirements and tolerances; horizontal and vertical (altitudinal) distribution.

- **Legislation**:

Legal regulations or statutes relating to the taxon.

- **Life cycle**:

Defines and describes obligatory developmental transformations. Includes metamorphosis, instars, gametophyte/embryophytes, transitions from sessile to mobile forms. Discusses timing. Morphology usually described in morphological descriptions.

- **Life expectancy**:

Any information on longevity, including The average period an organism can be expected to survive.

- **Look alikes**:

Other taxa that this taxon may be confused with. Useful for identification and comparison. Common in invasive species communities.

- **Management**:

Describes techniques and goals used in management of species. May include management relative to a piece of legislation, e.g., a CITES list.

- **Migration**:

Description of the periodic movement of organisms from one locality to another (e.g., for breeding). Usually includes locality, timing, and hypothesised purpose.

- **Molecular biology**:

Includes proteomic and biochemistry (e.g Toxicity). Genomic information is usually treated under genetics.

- **Morphology**:

Description of the appearance of the taxon; e.g body plan, shape and colour of external features, typical postures. May be referred to as or include habit, or anatomy.

- **Phylogeny**:

Description of phylogenetic and systematic treatments of the taxon.

- **Physiology**:

Description of physiological processes. Includes metabolic rates, and systems such as circulation, respiration, excretion, immunity, neurophysiology.

- **Population biology**:

Includes abundance information (population size, density) and demographics (e.g. age stratification).

- **Procedures**:

Deals with how you go about managing this taxon; what are the known threats to this taxon?

- **Reproduction**:

Description of reproductive physiology and behavior, including mating and life history variables. Includes cues, strategies, restraints, rates.

- **Risk statement**:

Negative impacts on humans, communities.

- **Size**:

Average size, max, range; type of size (perimeter, length, volume, weight . . .).

- **Taxon biology**:

Summary or overview of all aspects of an organism's biology.

- **Threats**:

The threats to which this taxon is subject.

- **Trends**:

An indication of whether a population is stable, or increasing or decreasing.

- **Trophic strategy**:

Summaries general nature of feeding interactions. For example, basic mode of nutrient uptake (autotrophy, heterotrophy, coprophagy, saprophagy), position in food network (top predator, primary producer, consumer), diet categorization (detritovore, omnivore, carnivore, herbivore). Specific lists of taxa are treated under associations (specifying predators or prey).

- **Uses**:

Benefits for humans (e.g. in the field of Economic Botany). Can include ecosystem services. However, benefits to ecosystems not specific to humans are best treated under Risk statement.

1.36 Import locations

Excel file imports can be used either for creating new nodes or for updating existing ones. Please see the *Import content* page for more general info.

To download the template file (for new data or for updating your data)

- Go to Import > Nodes > Excel file import
- Choose locations from the second drop-down menu
- Choose the template file you wish to work on (choose the first for creating new data or the second for changing or amending existing scratchpad data)
- Open the downloaded excel file in your computer and edit it

	A	B	C	D	E	F
1	GUID	Title	Continent/Ocean	Verbatim Coordinate System	Coordinate uncertainty in meters	Country
2	EU-GR-NE-CHALK-DK0019	EU-GR-NE-CHALK-DK0019	Europe	Decimal degrees	5	GR
3						
4						

Complete the columns as follows:

- **GUID**:

Use Global Unique Identifiers for each one of your localities. These identifiers will not show up to users. Use complex combinations like EU-GB-S-DK-000-001

- **Title**:

The title is the location identifier and will be used to refer to each specific location in your scratchpad. Make it human readable.

- **Continent/Ocean**:

Select the continent or Ocean of your locality. Choose one from the following: *Africa, Antarctic, Asia-Temperate, Asia-Tropical, Atlantic Ocean, Australasia, Europe, Indian Ocean, North-Central Pacific, Northern America, Northwestern Pacific, Pacific, South-Central Pacific, Southern America, Southwestern Pacific*

- **Verbatim Coordinate System**:

Provide the name of the system the coordinates of the locality were recorded. Choose one from the following: *decimal degrees, degrees decimal minutes, degrees minutes seconds, UTM, CRTM*.

- **Coordinate uncertainty in meters**:

The upper limit of the distance (in meters) from the given latitude and longitude describing a circle within which the whole of the described locality lies. Leave the value empty if the uncertainty is unknown, cannot be estimated, or is not applicable (because there are no coordinates). The value should be greater than zero.

- **Country (ISO alpha-2)**:

Choose the administrative region (Country) the locality is in. Please fill in the the official ISO 3166-1-alpha-2 country code. An exhaustive list can be found here.

	G	H	I	J	K	L	M	N	O
1	County	Geodetic datum	Georeference protocol	Georeference remarks	Island group	Island	Locality	Map	Maximum d
2	Municipality of Aristotle	WGS84					1,5 Km SW of Arnaia	POINT:(40.5028,23.512691)	
3									
4									
5									
6									

- **County**:

Provide the the name of a second-level administrative subdivision of a country.

- **Geodetic datum**:

Provide the geodetic datum of the locality coordinates. e.g. WGS84, NAD83, NAD27 etc.

- **Georeference protocol**:

Give a citation (publication or URL) to the resource describing the methods used to determine the georeference (coordinates AND uncertainty, or footprint)

- **Georeference remarks**:

Comments about the spatial description determination, explaining assumptions made in addition or opposition to the those formalized in the method referred to in Georeference Protocol.

1.37 Import users

1.37.1 Instructions

Excel file imports can be used either for creating new Users or for updating existing ones. Please see the *Import content* page for more general info.

To download the template file (for new data or for updating your data)

- Go to Import > Users > Excel file import

- Choose the template file you wish to work on (choose the first for creating new data or the second for changing or amending existing Scratchpad data)
- Open the downloaded excel file in your computer and edit it

Complete the columns as follows:

- **Title**: The title of the individual, either Mr, Mrs, Ms, Miss, Dr, Prof., or leave blank for no title.
- **Other/given name(s)**:
- **Family name**:
- **Country (ISO alpha-2)**:
- **Homepage (URL)**:
- **Institution**:
- **Area of Taxonomic Interest**:
- **Mail**:
- **Username**:
- **Password**:

1.38 Exporting data

Scratchpads support multiple ways of exporting your data. You can export data in specific content types as an .xls file or generate a standard compliant Darwin Core Archive file that includes all of your Scratchpads data.

1.38.1 Exporting as .xls

1. From the *Admin menu* go to *Import*
2. From the *Select Import* drop-down menu select accordingly
   - Select *Excel file Import* under *Files* to export metadata of uploaded media files
   - Select *Excel file Import* under *Nodes* to export data present of a specific content type
   - Select *Excel file Import* under *Taxonomy* to export one of the existing classifications in your Scratchpad
3. From the second drop-down menu select the media type or content type you wish to export as .xls file
4. Click on *Excel template file* to populate and download the file

The .xls file will include all your data in rows under columns that represent the fields in the corresponding media type, content type or taxonomy

1.38.2 Exporting as DwC-A

Darwin Core archive files can be used to automatically feed your data to other web-services (e.g. EOL, GBIF).

Enabling the DwC-A module

1. From the *Admin menu* got to *Structure* > *Tools*
2. Browse through the page and locate *Export*
3. For both *DarwinCore Archive (DwC-A) export* and *DarwinCore Archive (DwC-A)* click the switch to the *On* position
4. Click *Save*.

NOTE: Creating the DarwinCore Archive is resource intensive, and the task is processed in the background by *Cron*. The DarwinCore Archive will not be immediately available, so you might need to give it a few minutes before proceeding to *Downloading the file*.

Configuring DwC-A module

From the *Admin menu* got to *Configuration* > *DwC-Archive settings*

Here you can change the primary author used in the DwC-Archive file (if you have multiple maintainers on a site)

Downloading the file

1. Open a new browser tab and enter the address of your scratchpad site adding gbif-dwca.zip

   For example, http://phthiraptera.info/gbif-dwca.zip
2. You will be prompted to download a .zip file. Accept and save to your computer.

Please note that DwC-A files are not human readable, they are built to allow the sharing and re-use of biodiversity related information between machines over the web. You can use this archive file to contribute your scratchpad data to other Biodiversity information services like EOL or GBIF.

1.38.3 Exporting references

Scratchpads can export references in several formats (incl. BibTex RTF XML RIS)

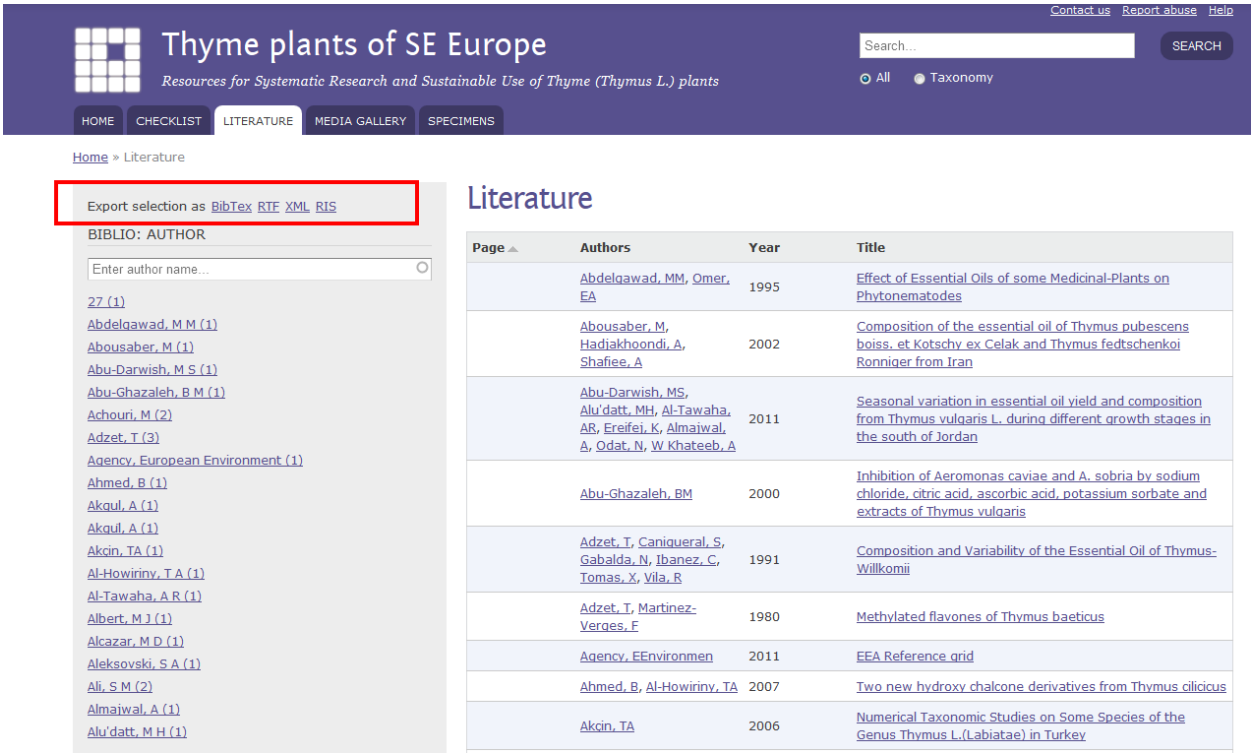
1. From the *Main menu*, go to the literature page of your Scratchpad
2. Select the references you want to export through the available facets. If no filtering is used all references will be exported
3. Click on the export format file you want to populate and download next to *Export selection as*
4. You will be prompted to download a file, save the file in your local or network disk

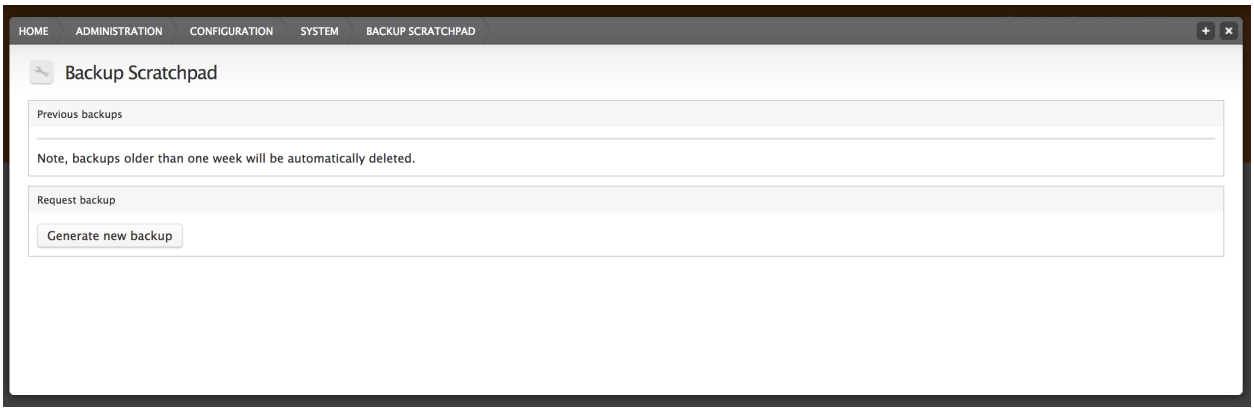
1.39 Create backup

You can create a backup of all the content on your Scratchpad.

1.39.1 Creating the backup

1. From the *Admin menu* go to *Configuration* > *Backup Scratchpad*


Contact us Report abuse Help
Thyme plants of SE Europe
Resources for Systematic Research and Sustainable Use of Thyme (Thymus L.) plants
Search...
SEARCH
All
Taxonomy
HOME
CHECKLIST
LITERATURE
MEDIA GALLERY
SPECIMENS
Home » Literature
Export selection as BibTex RTF XML RIS
BIBLIO: AUTHOR
Enter author name...
27 (1)
Abdelgawad, M M (1)
Abousaber, M (1)
Abu-Darwish, M S (1)
Abu-Ghazaleh, B M (1)
Achouri, M (2)
Adzet, T (3)
Agency, European Environment (1)
Ahmed, B (1)
Akgul, A (1)
Akgul, A (1)
Akcin, TA (1)
Al-Howiriny, T A (1)
Al-Tawaha, A R (1)
Albert, M J (1)
Alcazar, M D (1)
Aleksovski, S A (1)
Ali, S M (2)
Almajwal, A (1)
Alu'datt, M H (1)
Literature
Page
Authors
Year
Title
Abdelgawad, MM, Omer, EA
1995
Effect of Essential Oils of some Medicinal-Plants on Phytonematodes
Abousaber, M, Hadjakhoondi, A, Shafiee, A
2002
Composition of the essential oil of Thymus pubescens boiss. et Kotschy ex Celak and Thymus fedtschenkoi Ronniger from Iran
Abu-Darwish, MS, Alu'datt, MH, Al-Tawaha, AR, Ereifej, K, Almajwal, A, Odat, N, W Khateeb, A
2011
Seasonal variation in essential oil yield and composition from Thymus vulgaris L. during different growth stages in the south of Jordan
Abu-Ghazaleh, BM
2000
Inhibition of Aeromonas caviae and A. sobria by sodium chloride, citric acid, ascorbic acid, potassium sorbate and extracts of Thymus vulgaris
Adzet, T, Canigueral, S, Gabalda, N, Ibanez, C, Tomas, X, Vila, R
1991
Composition and Variability of the Essential Oil of Thymus-Willkomii
Adzet, T, Martinez-Verges, F
1980
Methylated flavones of Thymus baeticus
Agency, EEnvironmen
2011
EEA Reference grid
Ahmed, B, Al-Howiriny, TA
2007
Two new hydroxy chalcone derivatives from Thymus cilicicus
Akcin, TA
2006
Numerical Taxonomic Studies on Some Species of the Genus Thymus L.(Labiatae) in Turkey


HOME
ADMINISTRATION
CONFIGURATION
SYSTEM
BACKUP SCRATCHPAD
Backup Scratchpad
Previous backups
Note, backups older than one week will be automatically deleted.
Request backup
Generate new backup

2. Select *Generate new backup*

NOTE: Creating the backups is a resource intensive task, and are processed in the background by *Cron*. The backup will not be immediately available, so please check back later.

1.40 Download a taxonomic dictionary

Microsoft Word can use multiple custom dictionaries to check the spelling of your documents.

You can export your Scratchpads taxonomy as a word-compatible dictionary file.

1.40.1 Exporting custom dictionary

1. Go to *Admin menu* got to *Structure* > *Taxonomy*
2. Next to the vocabulary you'd like to use in the dictionary, click *Settings*
3. Select *Download Dictionary* tab to start the download of the .dic file.

1.40.2 Using dictionary

Instructions for installing the custom dictionary can be found at https://support.microsoft.com/en-gb/help/322198/how-to-add-a-custom-dictionary-in-word.

1.41 Exporting to geocat

GeoCAT is designed to produce rapid species level conservation assessments based on IUCN Red List Categories and Criteria (IUCN 2001).

You can use Scratchpads to import the occurrence data for the specimens of a taxon directly to GeoCAT. This will allow you to directly run a rapid species level conservation assessment.

Through an easy to use interface with a familiar Google Map underlay, you can upload primary occurrence data for a species and at the click of a button, calculate values relating to the geographic range of a species.

1. Go to the species overview page for the selected species
2. Click on the *specimens* tab
3. Click on the *Import into GeoCAT* link at the bottom of the specimens table

1.41.1 Short screencast

Watch on youtube

1.42 Adding & editing users

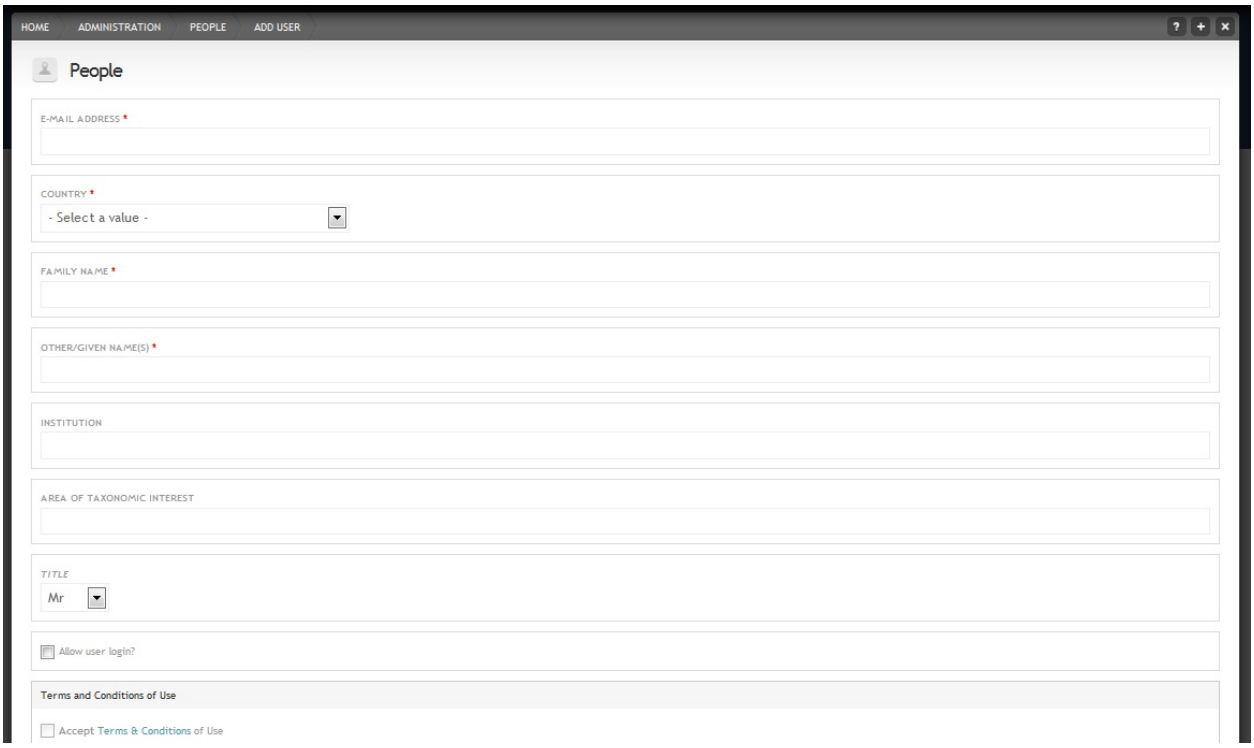
You can control user access under *People* in the *Admin menu*. The *People* page allows you to list all users of your site and perform actions (upgrade, delete, edit) on them.

There are five user *roles*:

- **Anonymous** A non-logged in user.
- **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

1.42.1 Adding a new user

1. Go to *People* in the *Admin menu*
2. Click *Add user* at the top of the overlay
3. For users that are allowed to log in, you need to check the *Allow user to login?* box at the bottom
4. Complete all the relevant boxes with example data (compulsory fields are marked with a red asterix)



1.42.2 Authorising new user accounts

All users of your Scratchpad have to be authorised by a site maintainer. When a new user creates an account the site maintainer will receive an email and will have to unblock them and add a user role before they can use the site.

1. Go to *People* in the *Admin menu*
2. Check the status and role of the user(s) you want to edit. Newly signed up users will have a status of "blocked"
3. Click the check box to the left of their username and select "Unblock the selected users" then click *Update*

1.42.3 Changing existing user roles

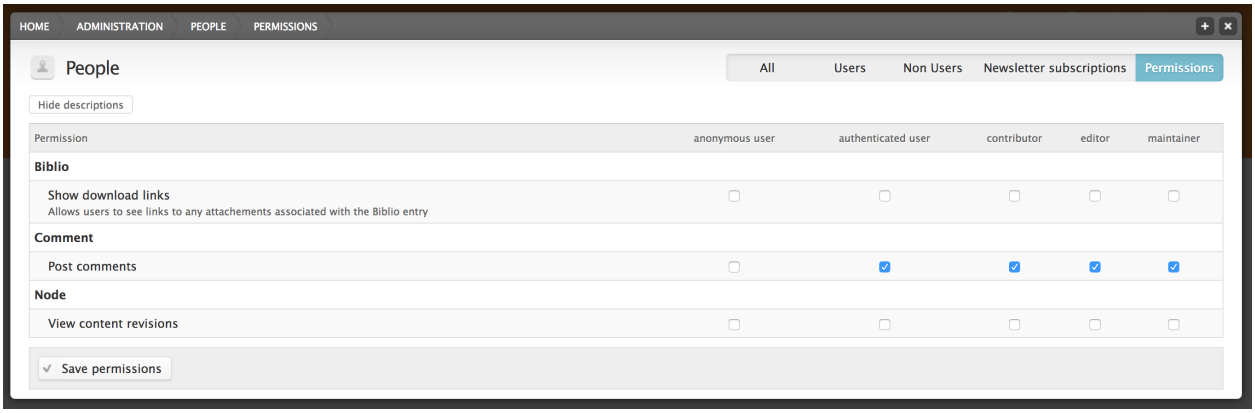
1. Go to *People* in the *Admin menu*
2. Check the role of the user(s) you want to edit
3. Click the check box to the left of their username and add or remove the required role then click *Update*

1.43 Permissions

Scratchpads let you control what features people can access on your site.

You can access the permissions from *Admin menu* go to *People* > *permissions*. Permissions can be set for each of the five user *roles*:

- **Anonymous** A non-logged in user.
- **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



1.43.1 Biblio

If you do not want people to download files attached to *Biblio* references you can update the permissions:

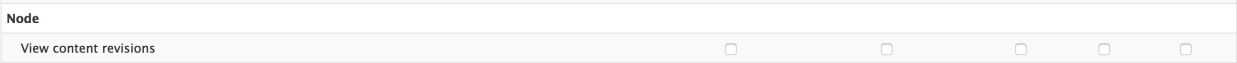
1.43.2 Comments

By default, only users with an account (non-Anonymous) can create comments.

You can change this by checking the *anonymous user* option in the *Post comments* permission.

1.43.3 Node revisions

Node revisions are only viewable by the content authors, but you can grant other roles access to view the changes.

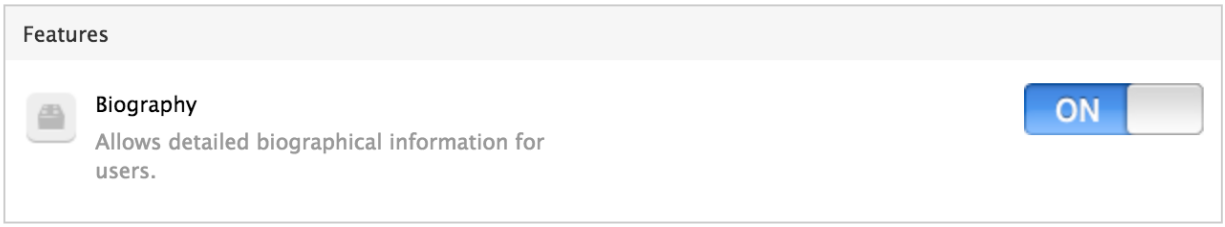


1.44 User biographies

The biographies module allows maintainers to add biographical information for existing people/users in a Scratchpad (e.g. date of birth, professional interests, example of handwriting etc). The module adds these fields to the editing environment of users and once enabled it also provides a direct link to a page with all the included biographies.

1.44.1 Enabling the module

1. From the *Admin menu* go to *Structure* > *Tools*
2. Enable *Biography* under the section called *Features*
3. Click *Save*



1.44.2 Adding a biography

1. From the *Admin menu* go to *People*
2. If the user to be updated exists already click *Edit* next to the name, otherwise select + *Add user* to add a new user. See more on how to add users at *Adding & editing users* page.
3. Fill in the fields accordingly and click *Save*

1.44.3 Viewing biographies

1. From the main menu select the new *Biographies* tab
2. All people that have biographies will be displayed in this page

1.45 Groups

Let's assume you want to prepare data for a publication online, but you don't want anybody to see these data, yet, except for yourself and maybe some co-authors. The best way to do this is by using a "Group".

Groups are private areas on a Scratchpad which are only accessible to group members. A user can have a higher user role within a group. For example someone who is contributor to the main Scratchpad can be administrator for a group and edit group content created by other group members.

Content generated within a group can be publicly visible or hidden. The creator of a group is usually responsible for managing the group and its users, but he/she can give other users administrative rights.

1.45.1 Enabling the Group module

Before you can add a group you need to enable the Group module.

1. From the *Admin menu* go to *Structure* > *Tools*
2. In the *Groups* section turn the Group module *On*
3. Click *Save*
4. If a message appears that you need to rebuild the content access permissions, click on the *Rebuild permissions* link and rebuild.
5. Go to the front page. A new menu item called *Group content* will appear in the Main menu. As long as there are no groups, the *Group content* page will show all the content on the site. In addition to the new menu item, new fields related to groups will appear when you add or edit content.

1.45.2 Adding a new group

1. From the *Admin menu* click *Content* and then *Add* link for Group
2. Enter a *GROUP NAME*
3. In the *BODY* field you can enter a short description of the group that will be visible to users on general group pages
4. Select *Group visibility* - Public or private
5. Click *Save*

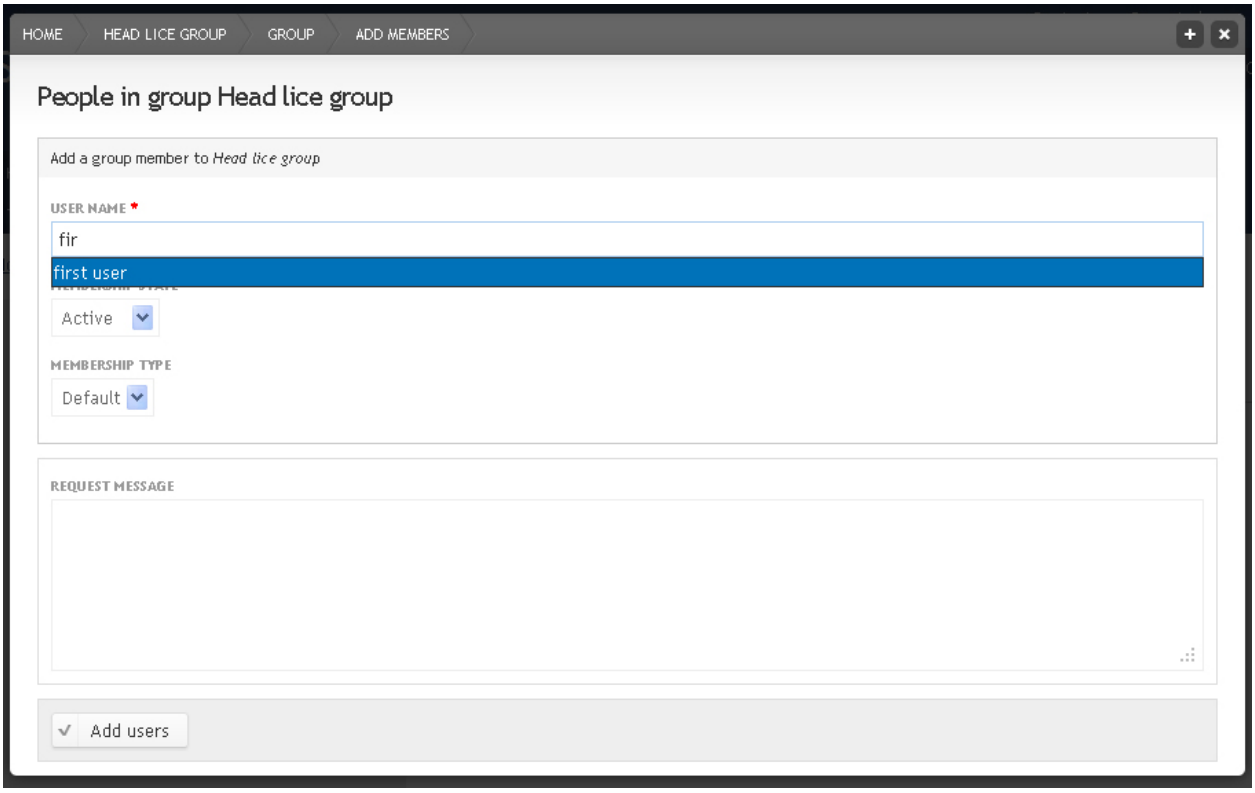
After saving you will see the main groups page which will show content linked to this group. It takes up to an hour for the Group name to actually show on this page and you will need to refresh the page to actually see it. However, you can already link content to the group or add members.

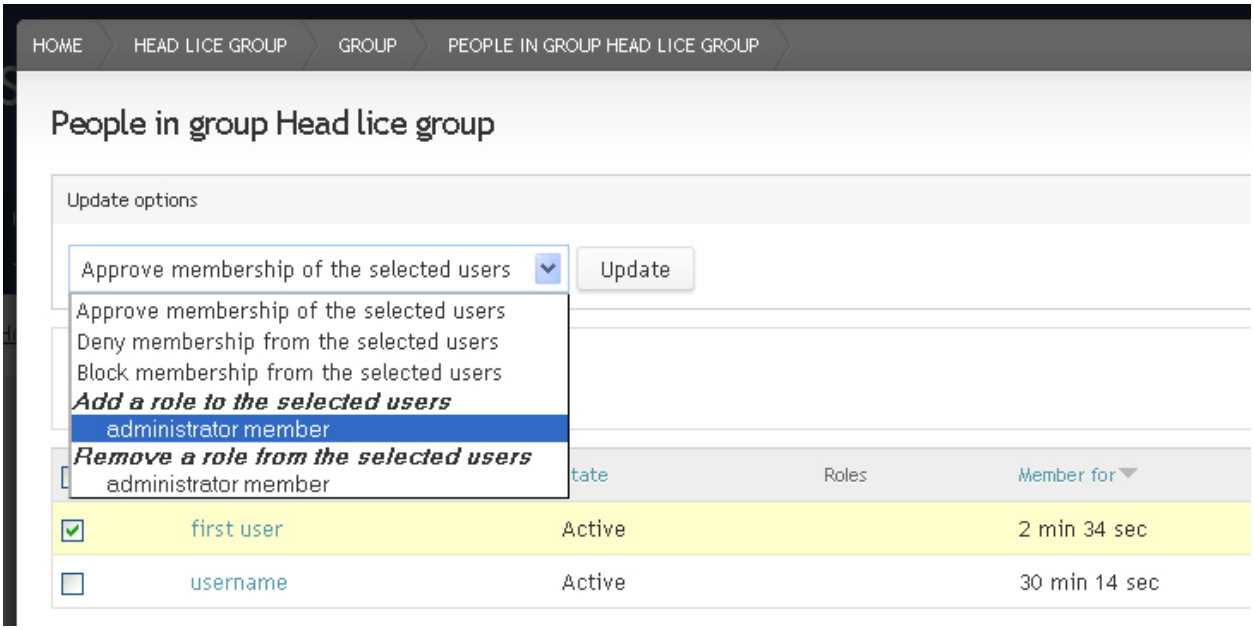
1.45.3 Add group members

1. *Edit* the group
2. Select the *Members* tab.
3. Click the *Add people* link.

2. Enter the USER NAME and click the button.

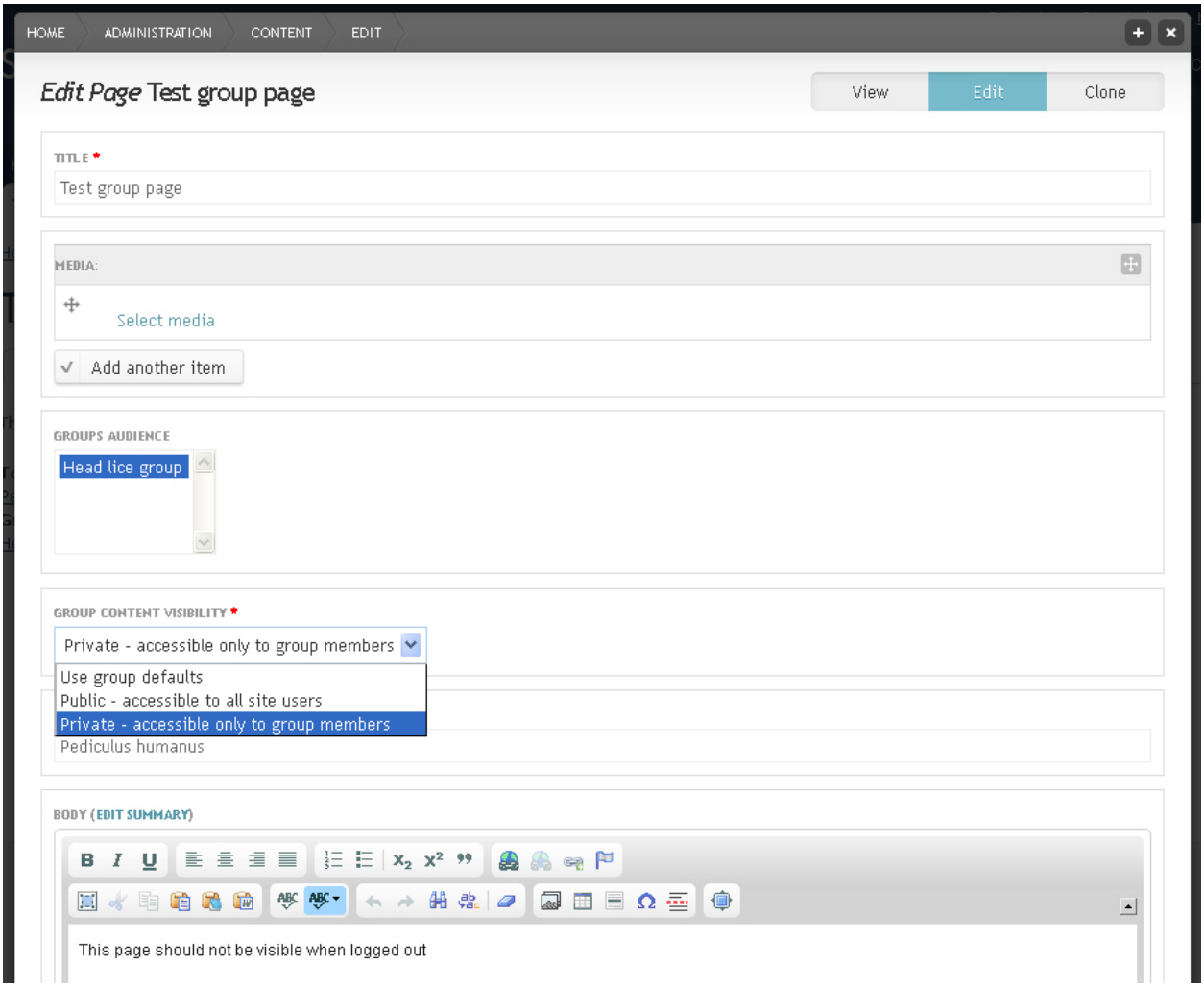
A user's role is the same within a group as it is on the rest of the Scratchpad and the only option is to give a member the "administrator member" role, which can be done on the page. Administrator members can edit the group and manage the subscriptions.


HOME
HEAD LICE GROUP
GROUP
ADD MEMBERS
People in group Head lice group
Add a group member to Head lice group
USER NAME *
fir
first user
Active
MEMBERSHIP TYPE
Default
REQUEST MESSAGE
Add users


HOME
HEAD LICE GROUP
GROUP
PEOPLE IN GROUP HEAD LICE GROUP
People in group Head lice group
Update options
Approve membership of the selected users
Update
Approve membership of the selected users
Deny membership from the selected users
Block membership from the selected users
Add a role to the selected users
administrator member
Remove a role from the selected users
administrator member
tate
Roles
Member for
first user
Active
2 min 34 sec
username
Active
30 min 14 sec

1.45.4 Adding content to the group

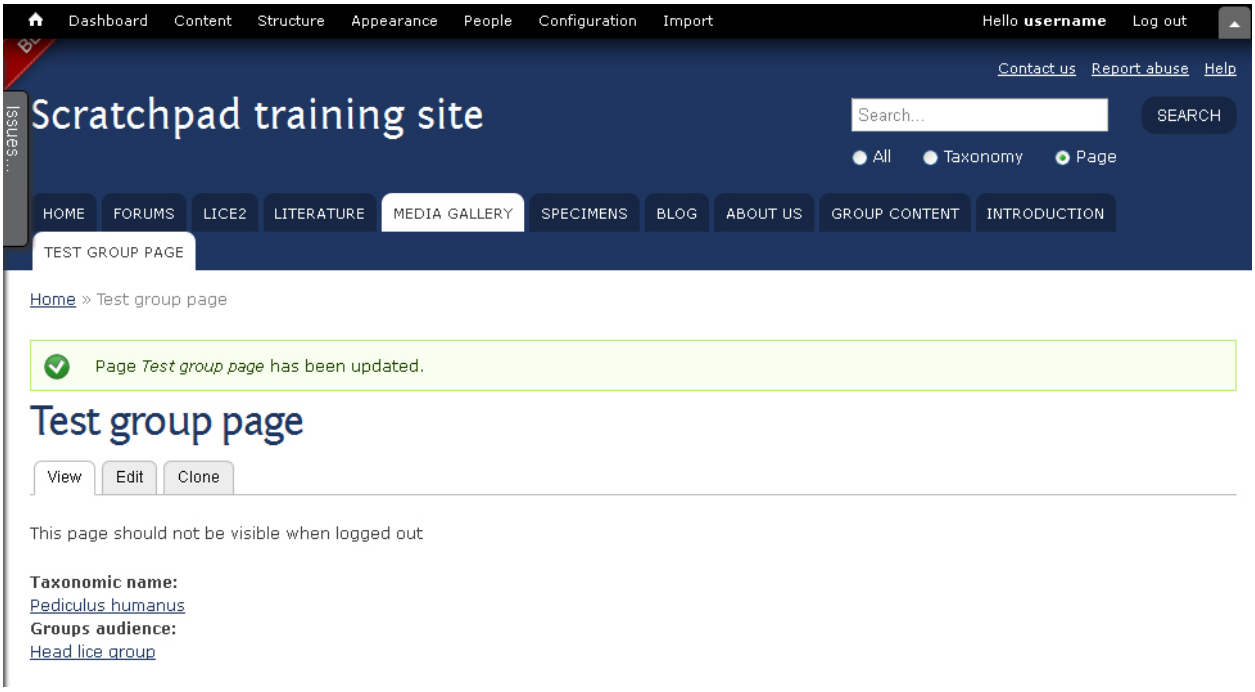
Add a new page



1. In the *GROUPS AUDIENCE* box select the new group
2. In the *GROUP CONTENT VISIBILITY* drop down menu select *Private - accessible only to group members*. Group content can also be public or use the default. The default is on public and this can only be changed by members of the Scratchpad team.
3. Click *Save*

You are now viewing your private group page. Note that the menu item linking to this page is visible and the page also pops up in the *Recent pages* block on the front page.

When logged out the menu item disappears and the page is not cited in the *Recent pages* block on the front page any more. The page itself gives an "Access denied" message (after refreshing the browser window with Control+F5).



1.46 Adding and editing views

The views module allows you to create, manage, and display lists of content.

Each list managed by the views module is known as a "view", and the output of a view is known as a "display".

Displays are provided in either block or page form, and a single view may have multiple displays.

1.46.1 Enable views interface

To enable views go to *Structure* in the *Admin menu*, click on *Tools*, enable 'Views' and save.

1.46.2 Table view

We will create a table view for the custom *literature mining* content type we created in *Custom content*.

Views can modify how lists of content are displayed on your site. The default display format for a new content type is an HTML list, but this can be changed to a table, grid or for example a map to display your data in an optimal way.

For the Literature mining content type a table would be best, so that is what we are going to do:

1. Click on the *LITERATURE MININGS* tab in the *Main menu* and then on the cog icon to the right of the node title. Click on *Edit view*.

Tip: Can't see the cog icon? Have you *Enable views interface*?

2. This will open the edit view administration interface.

Edit view administration page

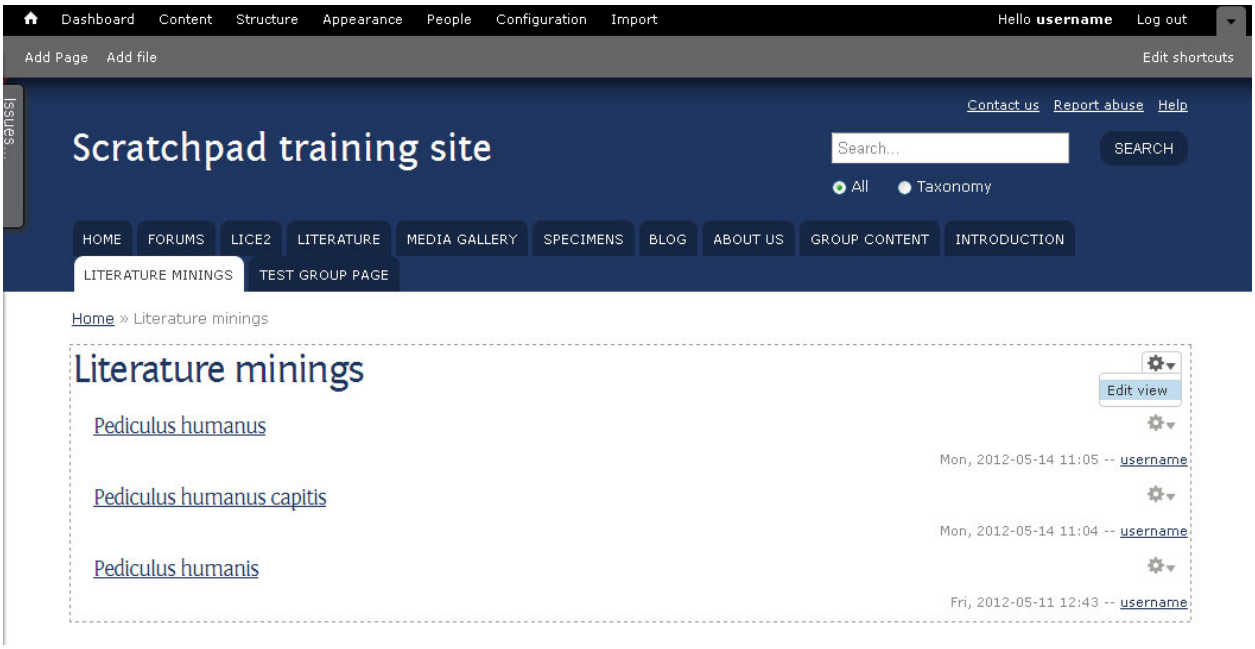
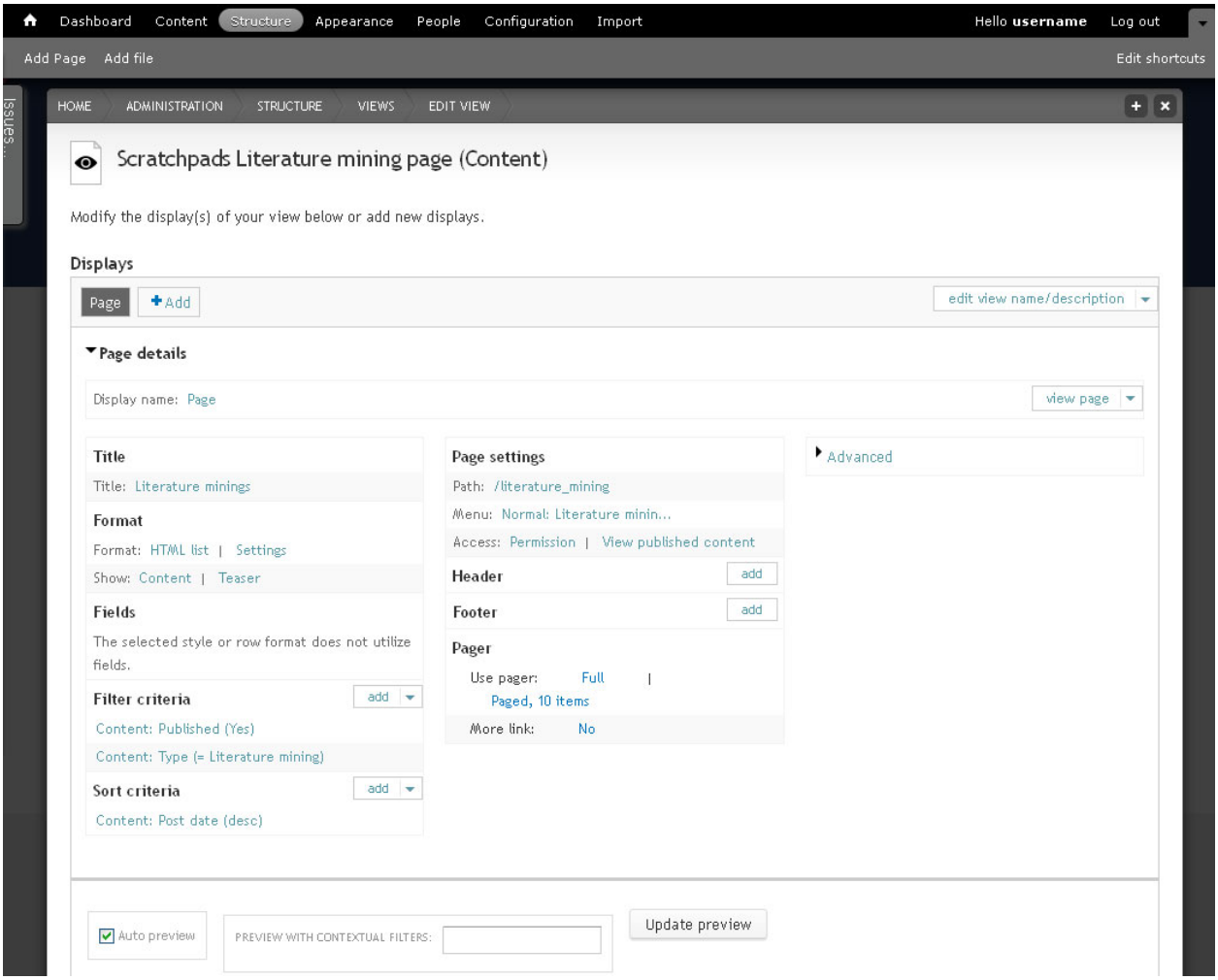


Fig. 10: Literature mining page with default HTML list display, showing edit link (top right)



Change Title

The system automatically added an "s" to the view title as well as the menu item. We will start by correcting this.

1. In the edit view interface, click *Literature minings* link in the 'Title' section.
2. Delete the "s" from the title.
3. Usually, when you edit any part of the view, you can decide whether you want to edit all displays and thereby change the default, or just the current page and thereby override the default settings only for this case. In our case we want to change the title for all displays, so click on the Apply (all displays) button.
4. A yellow message ("All changes are stored temporarily…") appears at the top of the page to make you aware that your changes are not permanent yet.
5. Click on the Save button in the upper right corner to make your changes permanent. This will automatically bring you back to the page view where you can check the changes.

You will notice that the menu item in the Main menu is still with an extra "s", so we need to change this, too.

Page settings: Menu

1. In the 'Page settings' section click on the link next to "Menu".
2. Remove the "s" from the TITLE. If needed you can add a description or change the parent menu item.
3. Click *Apply*.
4. Click *Save* to make your changes permanent.

Display Format

We want to change the default *HTML list* view to a table.

1. click on "HTML list" in the 'Format' section.
2. Select *Table*.
3. *Apply*.

At the bottom of the 'Edit view' page you can now see an example of what our new view is going to look like. As you can see, only the title field is showing, so we need to add more fields. Before we do this however, save the view and edit again.

Fields

The table view display requires you to chose which fields to include - you can see a new section called *Fields* has appeared below the *Format* section.

1. Click on the *Add* link to add more fields.
2. Select *Content: Literature mining category*, and then select the fields:
    - Content: Page
    - Content: Text
    - Field: Reference
    - Field: Taxonomic name

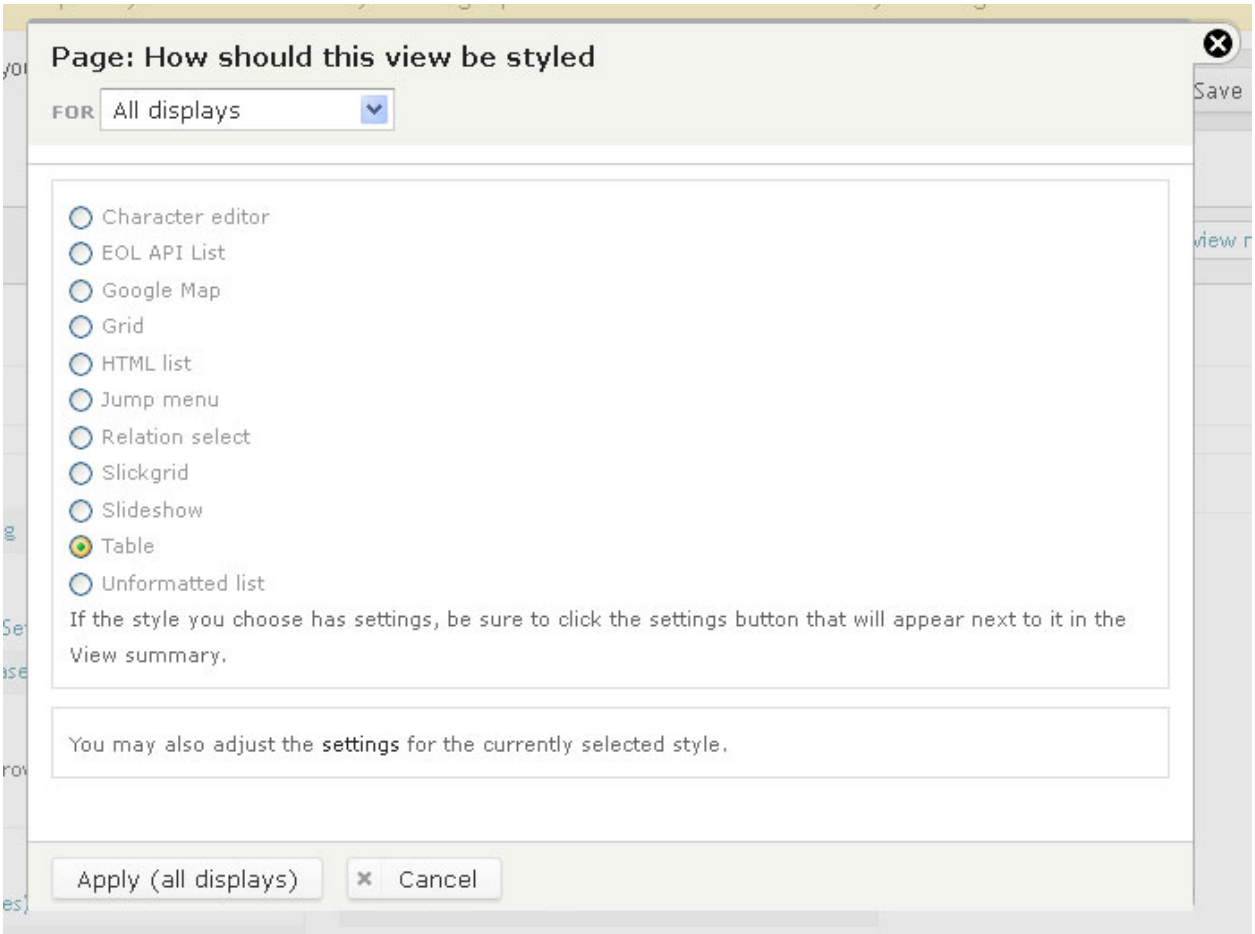


Fig. 11: Edit view: Change format

Note that below each field name is a list of the content types in which it appears, so you can find fields by searching for the literature mining content type.

3. Click *Apply*
4. Now you can configure the fields you selected one by one. The default is usually fine, so you don't need to change anything. However, you could for example make the column header (label) bold by clicking on Style settings , selecting 'Customize label HTML' and choosing "STRONG" from the 'Label HTML element' dropdown menu.

Fig. 12: Table view

5. Change the field order by clicking on the arrow down icon next to the add link in the 'Fields' section. Click on the rearrange link. Drag and drop the fields into a better order. Apply.
6. Select *Save* to make the changes permanent.

Filter criteria

Filters restrict a view to a certain set of data. Filters can be hidden or exposed. Exposed filters can be used by the users to search for certain data.

Two filters are already present for this view. The "Published (Yes)" filter that ensures that only published content will be shown in this view and the "Type (= Literature mining)" filter that ensures that only literature mining content is shown.

To help users in finding certain literature mining content we are now going to add a few filters that are exposed to the users.

1. Click on the *Add* link in the 'Filter criteria' section.
2. Select the fields:
   - Content: Literature mining category (field_literature_mining_category)
   - Field: Taxonomic name (field_taxonomic_name)
   - Field: Reference (field_reference)
3. Select *Apply*
4. Next configure each of the fields in turn. Adapt the labels and select "Expose this filter to visitors…" for all of them. For the taxonomic name filter also select "Expose operator" and "Allow multiple selections".
5. Save the view.

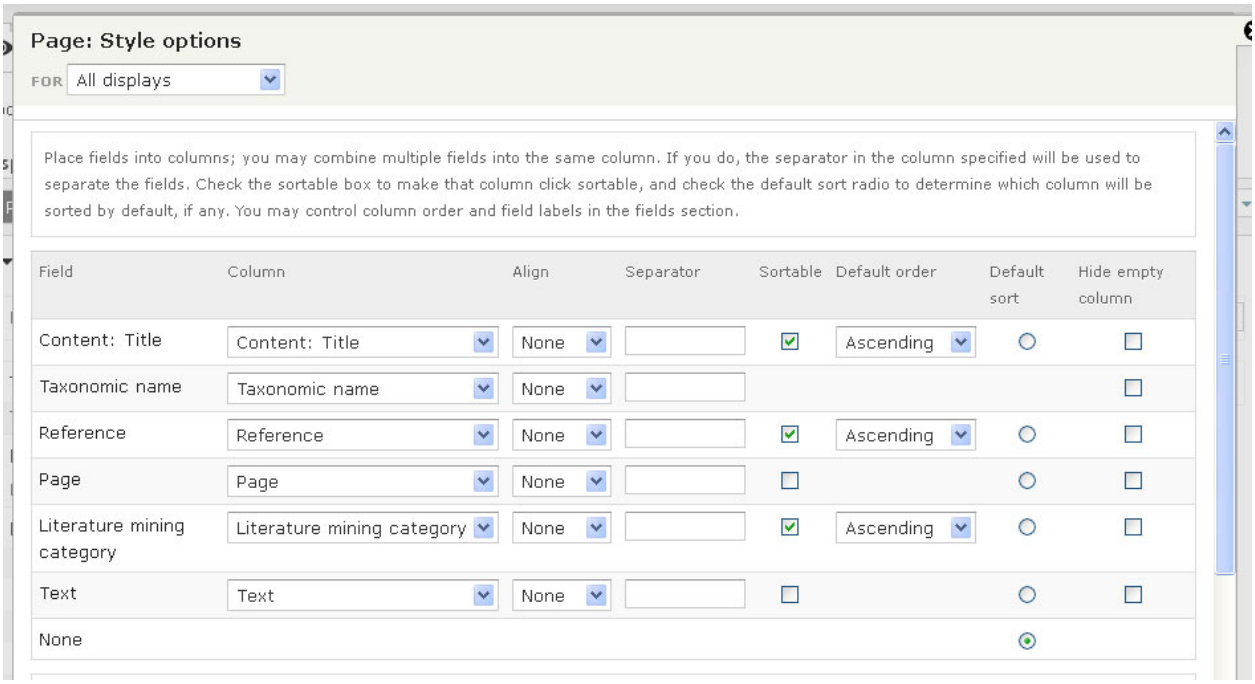
Header

It would be nice to add some introductory text above the table. The area above the table is called "Header" and the one below is the "Footer". So we'll need to add a header:

1. Edit the view again and click on add for the 'Header'.
2. Select "Global: Result summary" to get a summary of the number of items on the page and select "Global: Text area" for our introductory text. Next you can configure both fields. Add some introductory field in the text area field.

Table settings

With the right settings, the table rows (items) can be sorted by clicking on the header of the respective column.



1. Edit view
2. Click on the *Settings* link next to *Table* in the *Format* section.
3. Check *Sortable* for the title, reference and category fields.
4. Click *Apply*
5. *Save* changes

Pager

The default for tables is to use a pager that shows 10 items per page. To view more items the user has to click to the next page(s).

Views with pagination are quicker to load because only the first page needs to be uploaded. However, one problem with using pagers is that the sorting only works within a page not across all items. If we want to be able sort all items, we need to disable the pager.

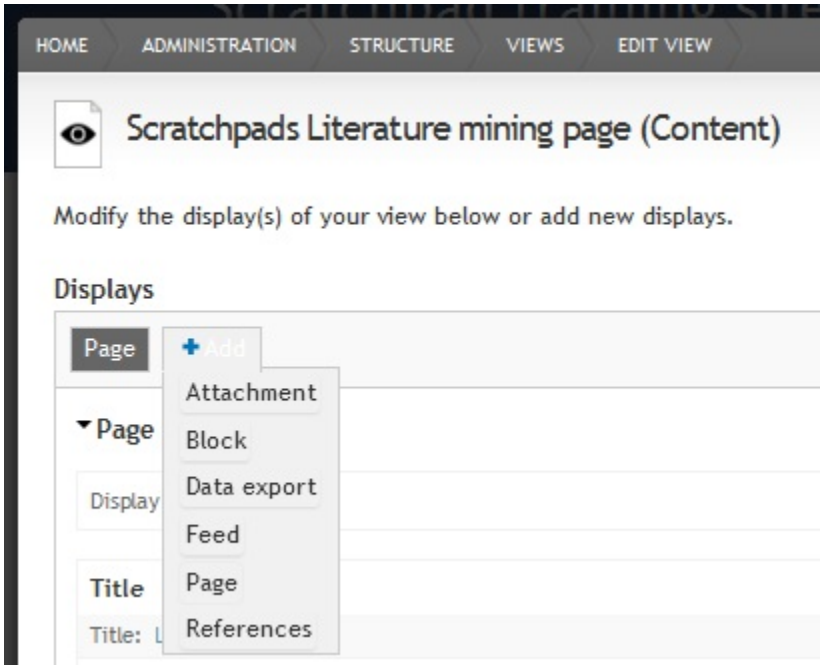
1. Click on the Full link next to *Use pager* in the *Pager* section.
2. Select *Display all terms*.
3. Click *Apply*.
4. Leave the offset as 0. Click *Apply* again.
5. Click *Save* to make changes permanent.

Sort criteria

The default sort criterion is the creation date of the items, with the most recent nodes at the top. You can change the sort criteria or add criteria in the 'Sort criteria' section.

Additional displays

In addition to changing the existing display, you can add new displays.



1. Click on the Add button in the 'Displays' section near the top of the views administration page.
2. Select one of the display options:
   - Attachment: With this display, you can attach one display of a view to another display. This allows you to group different views together.
   - Block: Creates a block display.
   - Data export: Creates a file.
   - Feed: Creates a feed.
   - Page: Creates a page display.
   - References: Creates a references view that can be added for example as a field (e.g. node references view) to custom content types.

TIP: Take care when changing the settings of your new display that you only change the current display (override) and not all displays.

We will learn more about adding one of these displays in the next section - *View blocks*

1.47 View blocks

As we learnt in *Adding and editing views* the views module allows you to create, manage, and display lists of content.*

These views of content can be a *Block* - a small lists of information that can be embedded on other pages.

We will create a block to display the subordinate taxa of a classification term, and display it on species page.

1.47.1 Enable views interface

If you haven't already, enable the views interface:

1. Go to *Structure* in the *Admin menu*, click on *Tools*, enable 'Views' and save.

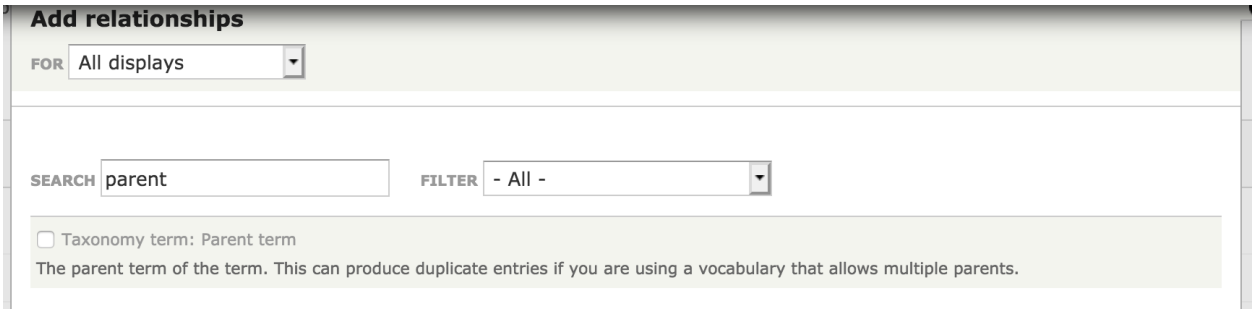
1.47.2 Create block view

1. Within the *Admin menu*, go to *Structure* > *Views*
2. Select + *Add new view*
3. Enter the view name - for example "Species subordinate taxa"
4. In the *Show* section, select *Taxonomy terms*, and under *Of type* select the vocabulary you want to use.
5. Deselect *Create a page*
6. Select *Create a block*
7. Enter a block title - for example "Subordinate taxa"
8. Under display format, select *Table*
9. Select *Continue & edit*
10. Click *Save* to make changes permanent

Add relationship and contextual filter

We want to show taxa which are subordinate to the currently viewed taxon. To do this we need to add a relationship and contextual filter, so we can display terms based on their parent term.

1. On the edit view form, in the *Relationships* section click *Add*.
2. Filter the relationship types by 'parent', and select *Taxonomy term: Parent term*.
3. Select *Apply*.
4. On the next screen leave the defaults (Identifier=Parent), and click *Apply*.
5. In the *Contextual filters* click *Add*.
6. Filter the contextual filters by 'parent', and select *Taxonomy term: Parent term*.



7. Under *Relationship*, select "Parent" (or the identifier value from *Step. 6* if you did not keep the defaults)
8. Select *Provide default value*
9. Select *Taxonomy term ID from URL*
10. Select *Apply*
11. Select *Save* to store your changes permanently.

The view is now ready to use, but we still need to add the block to the page. We'll see how to do this in the next section - *Enabling blocks*

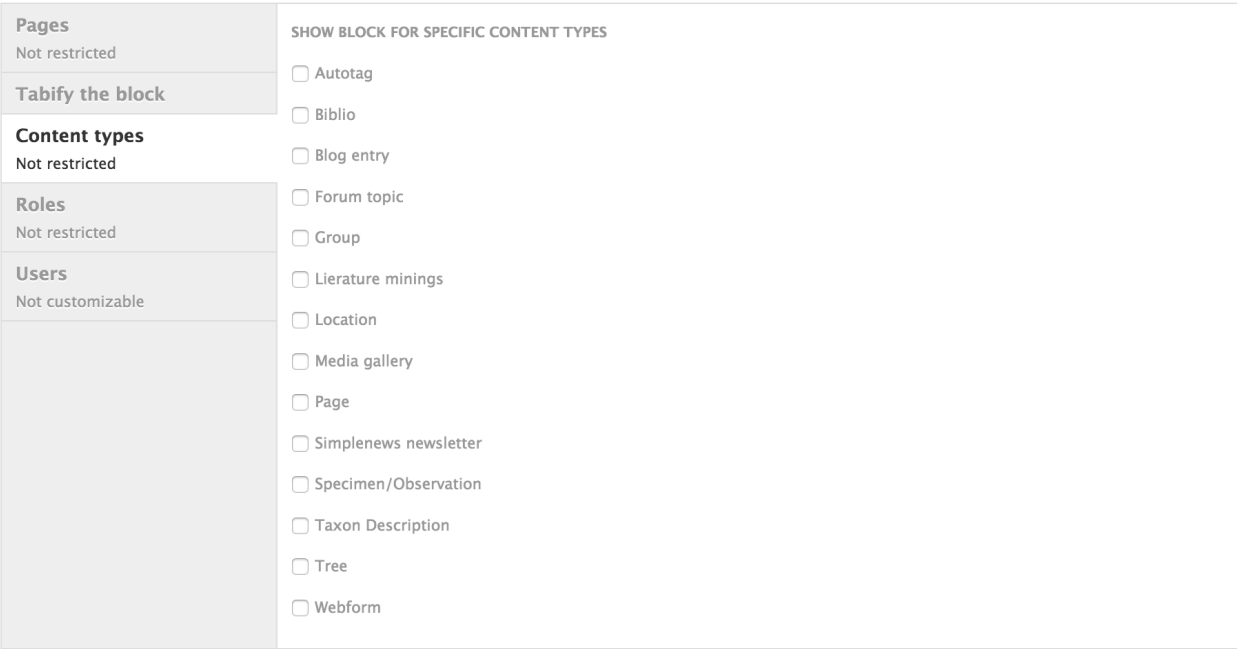
1.48 Enabling blocks

1. In the *Admin menu* go to *Structure* > *Blocks*
2. Scroll the page to find the Block you wish to enable.
3. Click on the *Configure* link
4. If needed, you can give a title for your block. This will replace the default title.
5. In the region settings select where you wish your block to appear:
   - Select *Sidebar* if you wish the block to be visible as a right sidebar in one or more of your pages
   - Select *Footer* if you wish the block to be visible in the footer area in one or more of your pages
   - Select *Menu* if you wish the block to be visible in menu in one or more of your pages. Note: this option will not work with all Blocks.
   - Select *Main content* if you wish the block to be visible in the main content section of the page.
6. From the *Pages* tab select on which pages you wish the block to appear/be excluded from.

   You can target the pages by writing the paths, with multiple paths per line.
7. Click *Save block*

1.48.1 Additional options

- Rather than specifying page paths to display the block on, you can set the block to be visible on certain content type pages.
- Under *Roles* you can also restrict viewing the block to uses with a specific role.
- Select *Display as Tab* in the *Tabify the Block* tab if you wish the content of the block to appear as a sidescreen tab (like the issues queue tab)



1.49 Create webform

Webform is the module for making forms and surveys in Drupal. After a submission customizable e-mails can be sent to administrators and/or submitters. Results can be exported into Excel or other spreadsheet applications.

In this example, we will create a webform for a conference registration. People can fill in the form without having to register or log in to the Scratchpad site.

1.49.1 Enable the webform module

1. In the *Admin menu* go to *Structure* > *Tools*
2. In the 'Webform' section turn Webforms on and save.

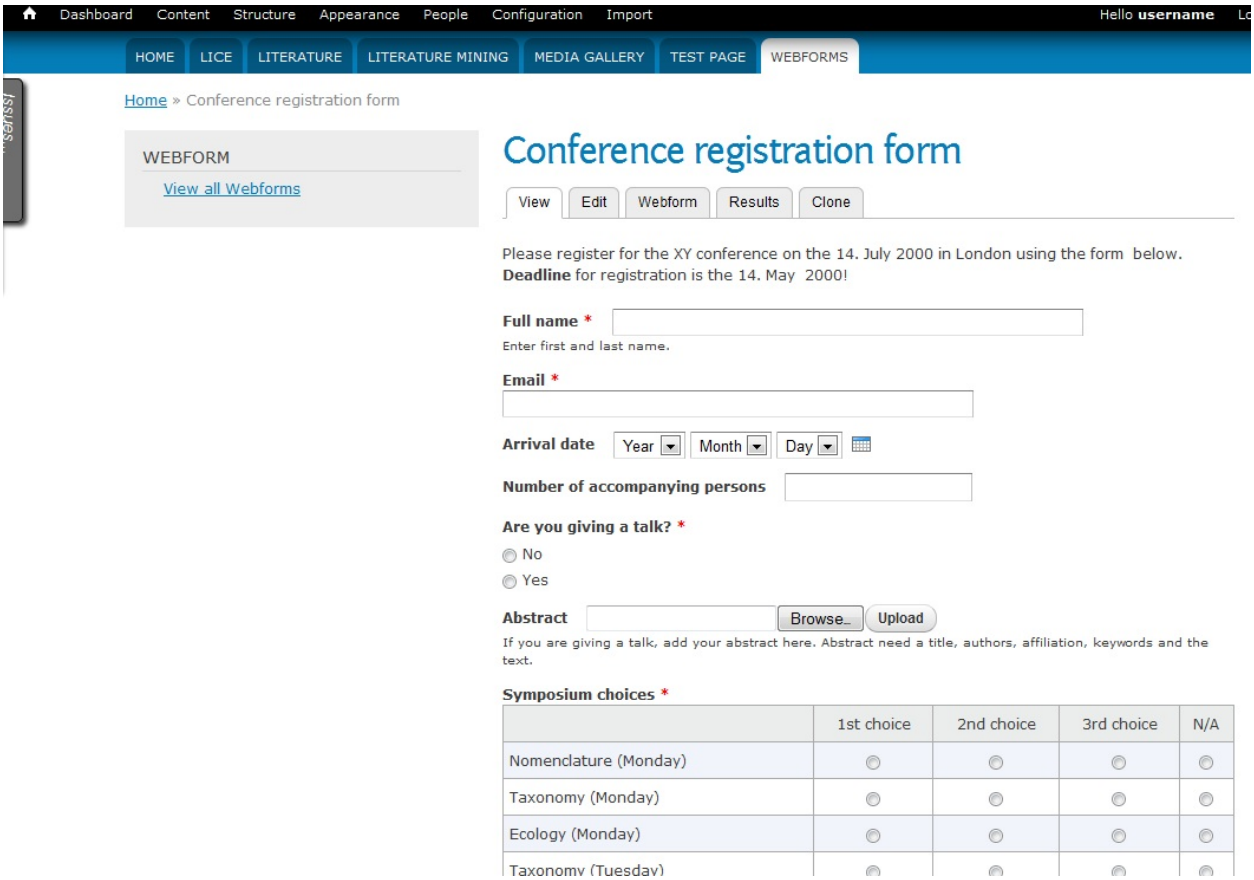
1.49.2 Create a webform

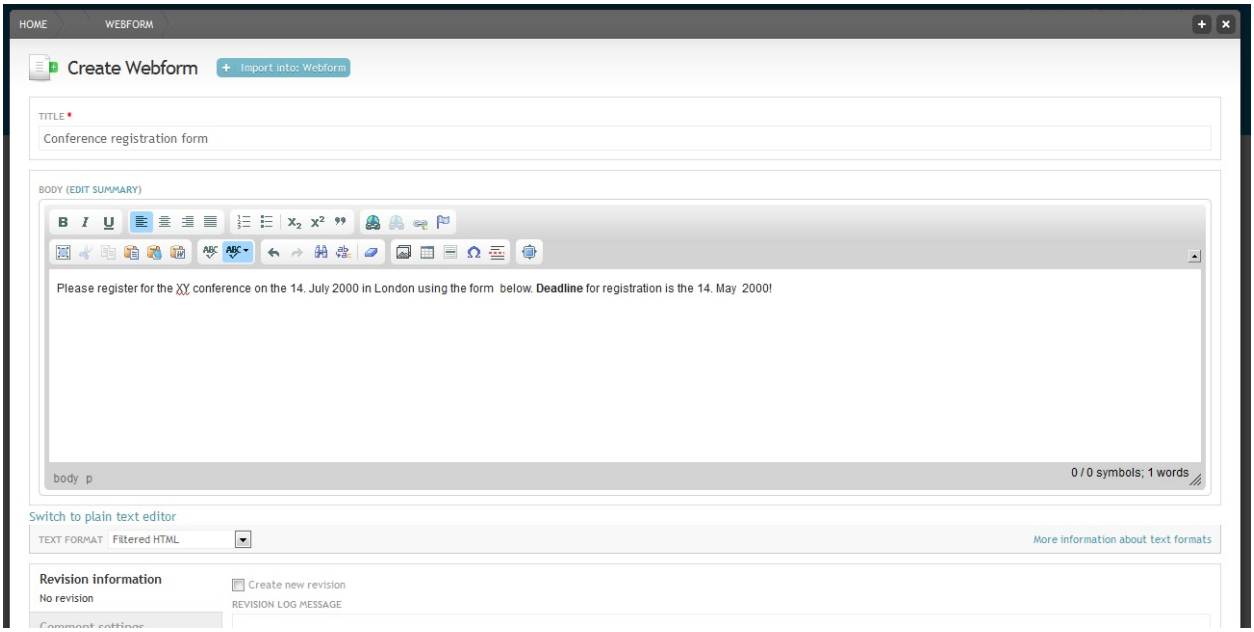
1. In the *Admin menu* go to *Content*
2. Next to *Webform*, click *Add*

   Create a webform
3. Enter a TITLE and some BODY text. The body text will appear at the top of the form and can be used for an introduction.
4. *Save*. Now we can enter fields to your form.

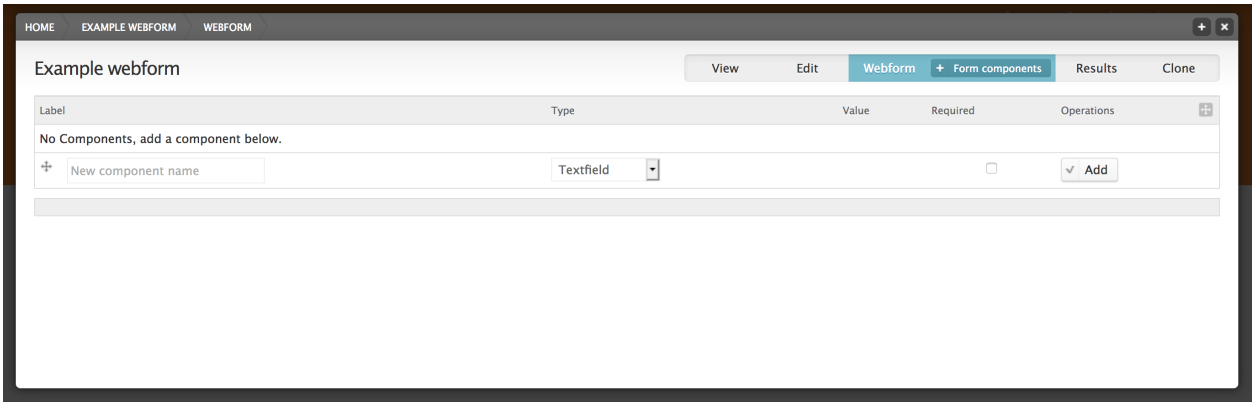
1.49.3 Add webform components

Components is the webform terminology for fields. To start adding components start editing a webform, and select the *Webform* tab.


Dashboard
Content
Structure
Appearance
People
Configuration
Import
Hello username
HOME
LICE
LITERATURE
LITERATURE MINING
MEDIA GALLERY
TEST PAGE
WEBFORMS
Home » Conference registration form
WEBFORM
View all Webforms
Conference registration form
View
Edit
Webform
Results
Clone
Please register for the XY conference on the 14. July 2000 in London using the form below.
Deadline for registration is the 14. May 2000!
Full name *
Enter first and last name.
Email *
Arrival date
Year
Month
Day
Number of accompanying persons
Are you giving a talk? *
No
Yes
Abstract
Browse...
Upload
If you are giving a talk, add your abstract here. Abstract need a title, authors, affiliation, keywords and the text.
Symposium choices *
1st choice
2nd choice
3rd choice
N/A
Nomenclature (Monday)
Taxonomy (Monday)
Ecology (Monday)


HOME
WEBFORM
Create Webform
Import into: Webform
TITLE *
Conference registration form
BODY (EDIT SUMMARY)
Please register for the XY conference on the 14. July 2000 in London using the form below. Deadline for registration is the 14. May 2000!
body p
0 / 0 symbols; 1 words
Switch to plain text editor
TEXT FORMAT
Filtered HTML
More information about text formats
Revision information
No revision
Create new revision
REVISION LOG MESSAGE

This opens the webform components interface:

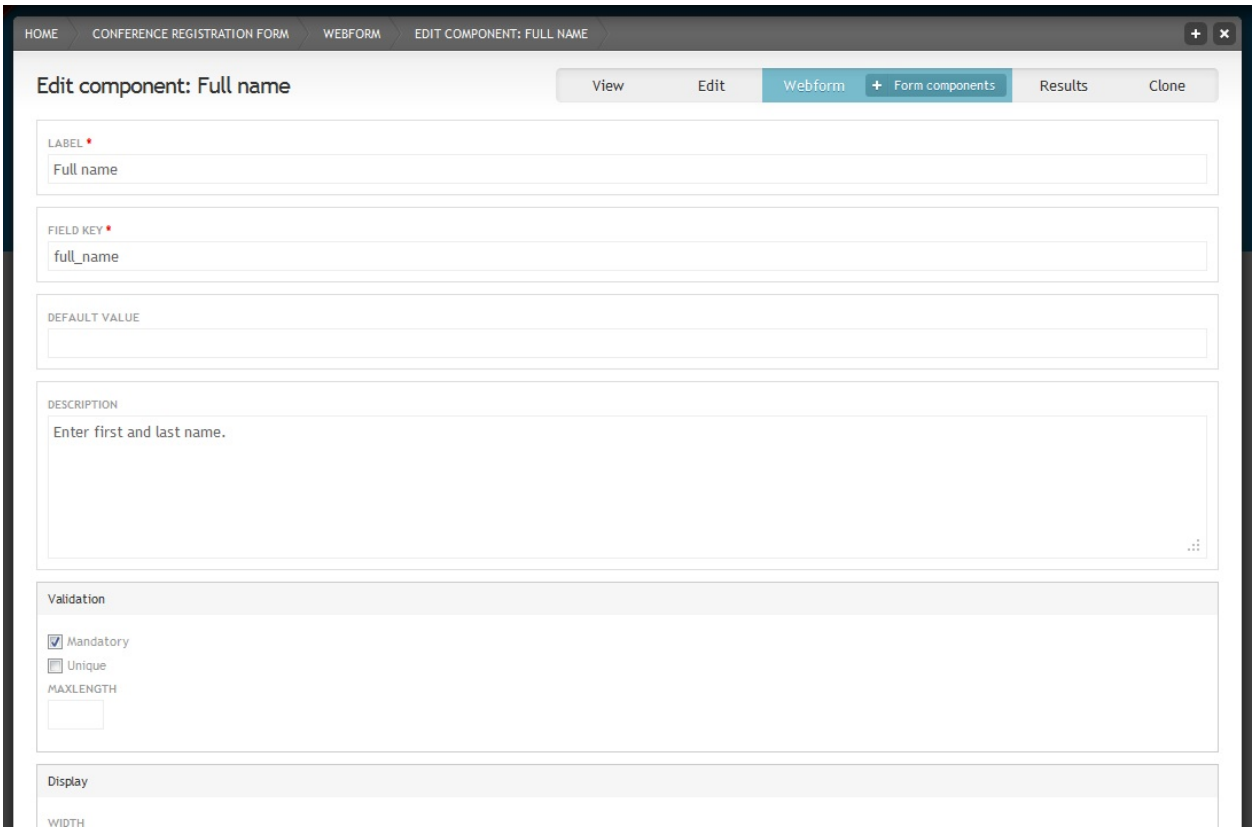


Select the type of field you want (*Text field*, *Date field*, *Number field*, *Select option field*, *File field*, *Grid field*, *Text area field*, *Private field*) and click *Add*

Text field

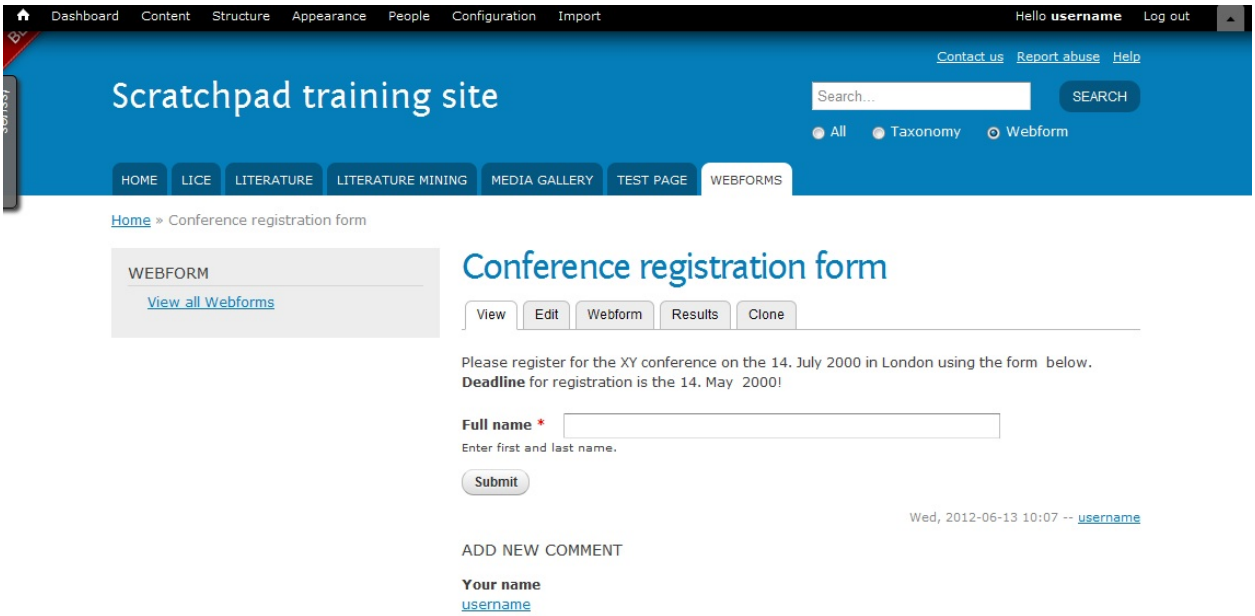
Components of the type "Textfield" are for entering short text that is up to 255 characters long. Add a component for entering the full name.

- Add "Full name" as the new component name and select the "Textfield" type. Check "Mandatory". Mandatory means that the user has to fill in this field before he can submit the form. Click the button.



Webform component settings

- Under 'DESCRIPTION' add a short instructions that help users in filling in this field.
- In the 'Display' section you have several options for changing the display. For example if you add a field asking for the size of a poster, you could add "cm" in the 'LABEL PLACED TO THE RIGHT OF THE TEXTFIELD' field, so that users know to give the size in centimetres. By default the label is placed above the field. To save space select "Inline" as 'LABEL DISPLAY'. For our "Full name" example component just select "Inline" display and none of the other display options. Save component.



Webform with introduction and one component

- Click on the tab to check how your webform looks so far. Then click on the tab to add more components.

Email field

- Add "Email" as the new component name and select the "E-mail" type. Check "Mandatory". Click the button. Save.

Date field

- Add "Arrival date" as the new component name and select the "Date" type. Enter "2000-05-29" as 'START DATE'. Enable the pop-up calendar and choose "inline" for the label display. Save.

Number field

- Add "Number of accompanying persons" as the new component name and select the "Number" type. Add. Check "Integer" in the 'Validation' section. Choose "inline" for the label display. Save.

Select option field

- Add "Are you giving a talk?" as the new component name and select the "Select options" type. Check "Mandatory". Add. Enter "1|No" and "2|Yes" in the 'OPTIONS' field in two lines. The 'OPTIONS' field uses safe keys. Safe keys ensure that each options is saved individually. For example if you publish a webform and at a

later stage decide to change the wording of one of the options, you would only change the readable option, not the save key. That way the system recognises that this is still the same option and this will help you later when you evaluate the results. The safe key is always on the left side and separated from the readable option by a pipe character. Save.

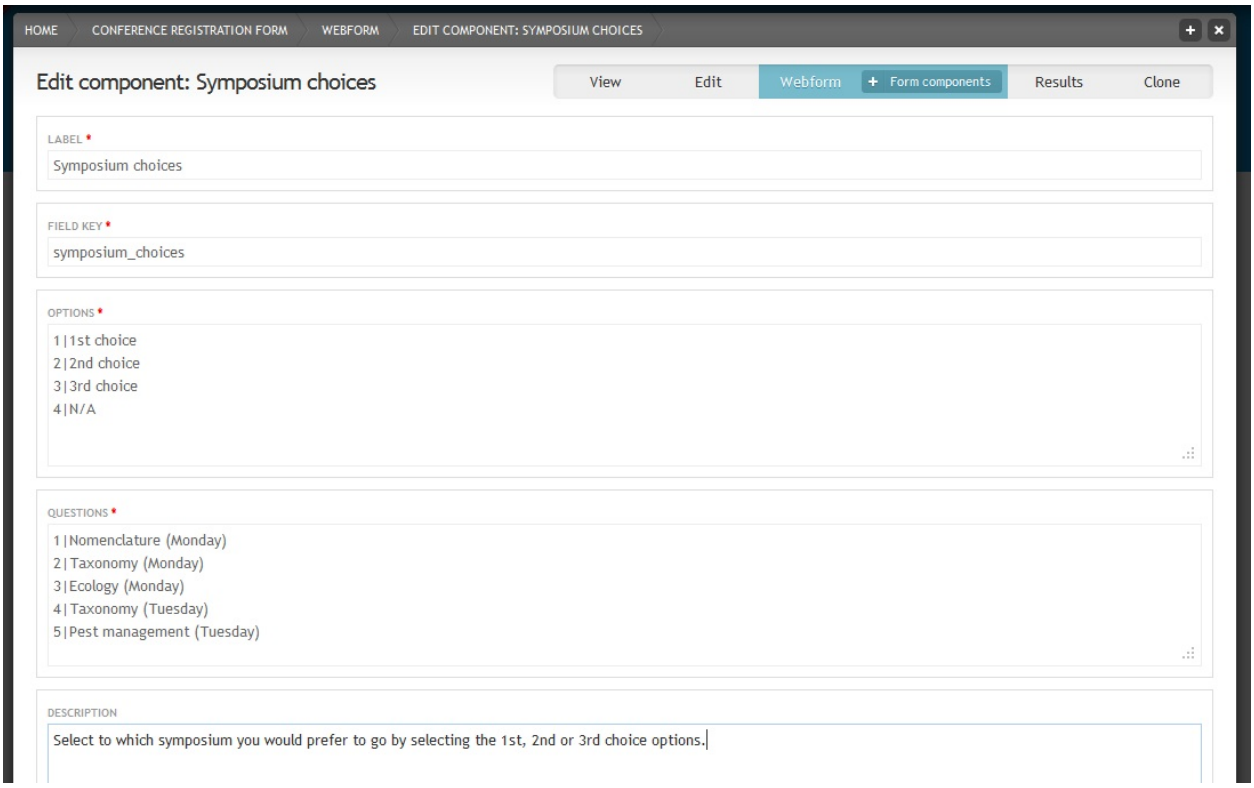
File field

- Add "Abstract" as the new component name and select the "File" type. Click the button. Add some instructions on what the abstract should contain in the 'DESCRIPTION' field. In the 'UPLOAD DESTINATION' section check "Private files" so that only user that have the right to view submissions can view the abstracts. Under 'ALLOWED FILE EXTENTIONS' unselect the web images extensions and choose several documents extensions instead. Save.

Grid field

Grid fields allow the user to select different choices for a set of questions. Grids are often used in questionnaires to for example state how good something is on a scale from 1 to 5. For our conference registration webform we will assume that participants numbers for symposia are restricted add a grid in which users can state how important the attendance at specific symposia is for them.

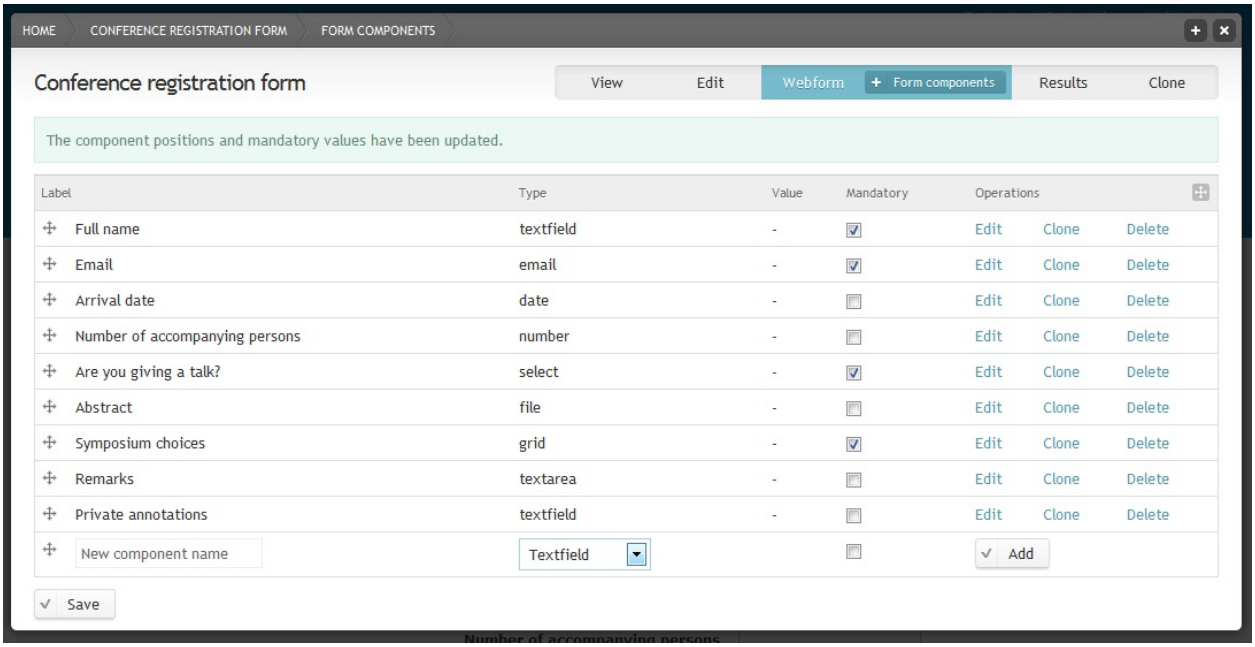
- Add "Symposium choices" as the new component name and select the "Grid" type. Check "Mandatory". Click the button.



Webform component settings for Grid fields

- Add some options as well as the questions (both with safe keys) and a description. Save.

Webform administration page with various form components



Text area field

Text area fields are for longer text.

- Add "Remarks" as the new component name and select the "Textarea" type. Click the button.

Private field

If you want to annotate the forms that users have submitted without having the annotation field showing up in the webform, check "Private" at the bottom of the component settings page.

- Add "Private annotations" as the new component name and select the "Textfield" type. Click the button. Check "Private". Save.
- Click on the tab to have a look at your webform. For long forms you can add page breaks if needed. Log out of your Scratchpad and go to the webform page. You will notice that the "Private annotations" field is now hidden.

The webform is ready to to be used so lets setup a way to monitor responses and analyse the results - see *Administer webforms*.

1.50 Administer webforms

After *Create webform* we want to monitor responses and analyse the results.

1.50.1 Email settings

Notifications

Receive a notification every time the webform is submitted.

1. Locate the webform you wish to administer.

2. Select *Edit*
3. Select *Webform* tab.
4. Select +*Emails*
5. Enter the email address you wish to send notifications to.

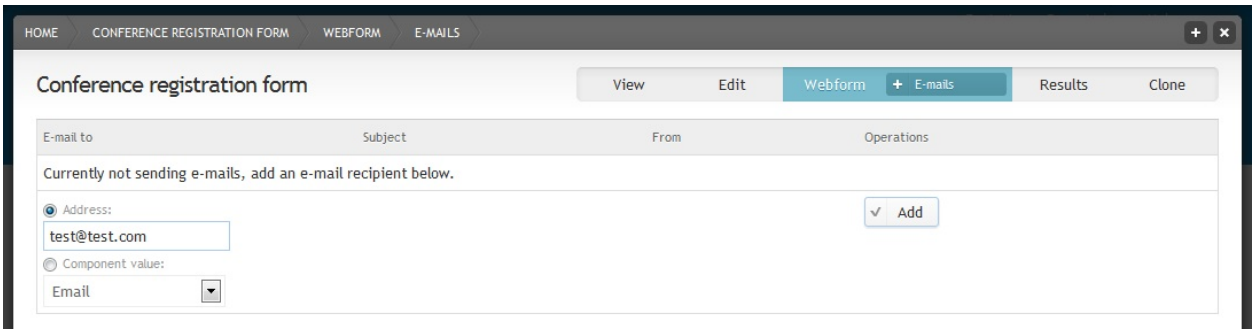


Fig. 13: Add an email address for webform notifications

6. Click *Save configuration*

Confirmation

Send a confirmation message to the user who submitted the form

1. Locate the webform you wish to administer.
2. Select *Edit*
3. Select *Webform* tab.
4. Select +*Emails*
5. Select *Component value*
6. Select the field that contains the email of the user and click on the button. This will only work if you have used an email type field in our webform.
7. In the 'E-mail template' section select "Custom template" in the drop down menu and enter some custom text in the field below, e.g. "Thank you for registering…"

8. Click *Save configuration*

Form settings

The form settings page allows you to add a confirmation message to the website and limit submissions.

1. Locate the webform you wish to administer.
2. Select *Edit*
3. Select *Webform* tab.
4. Select +*Form settings*
5. Add a confirmation message. This message will appear on the screen after the user has submitted the form.

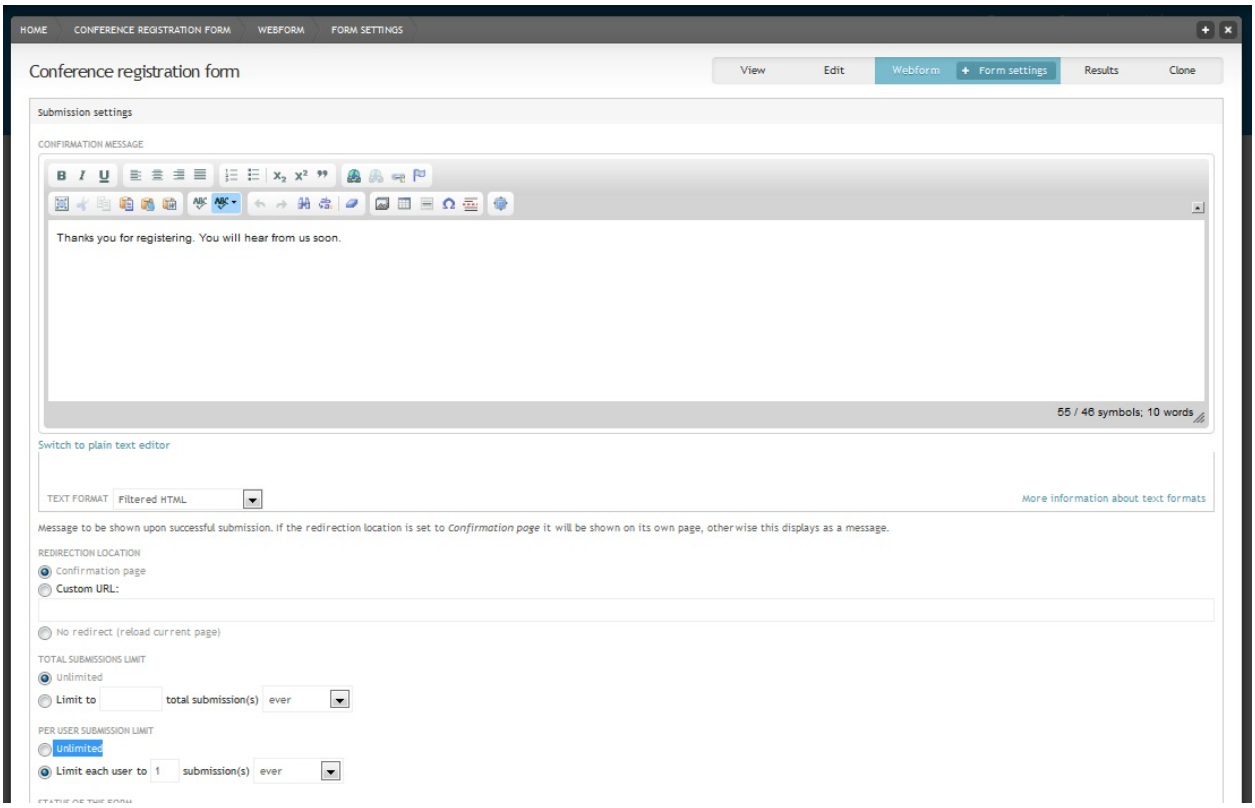


Fig. 14: Webform form settings page

6. Under PER USER SUBMISSION LIMIT limit each user to 1 submission ever.
7. Click *Save configuration*

Results

Submit the form a couple of times to test the confirmation message and notification emails.

1. On the webform, Select *Edit* > *Results*
2. On the + *Submissions* page you see a list of all submissions and can view, edit or delete single submissions.

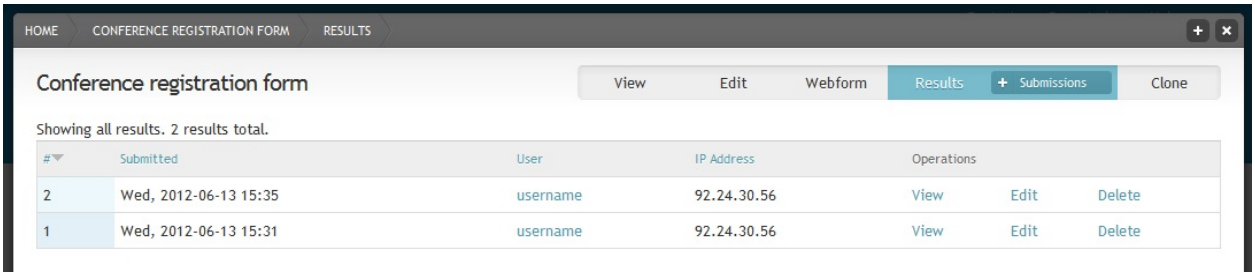


Fig. 15: List of webform submissions

3. Click on + *Submissions* and select the + *Analysis* option. You will be presented with statistics for each field.
4. Click on + *Analysis* and select the + *Table* option to view all submissions in a table format.

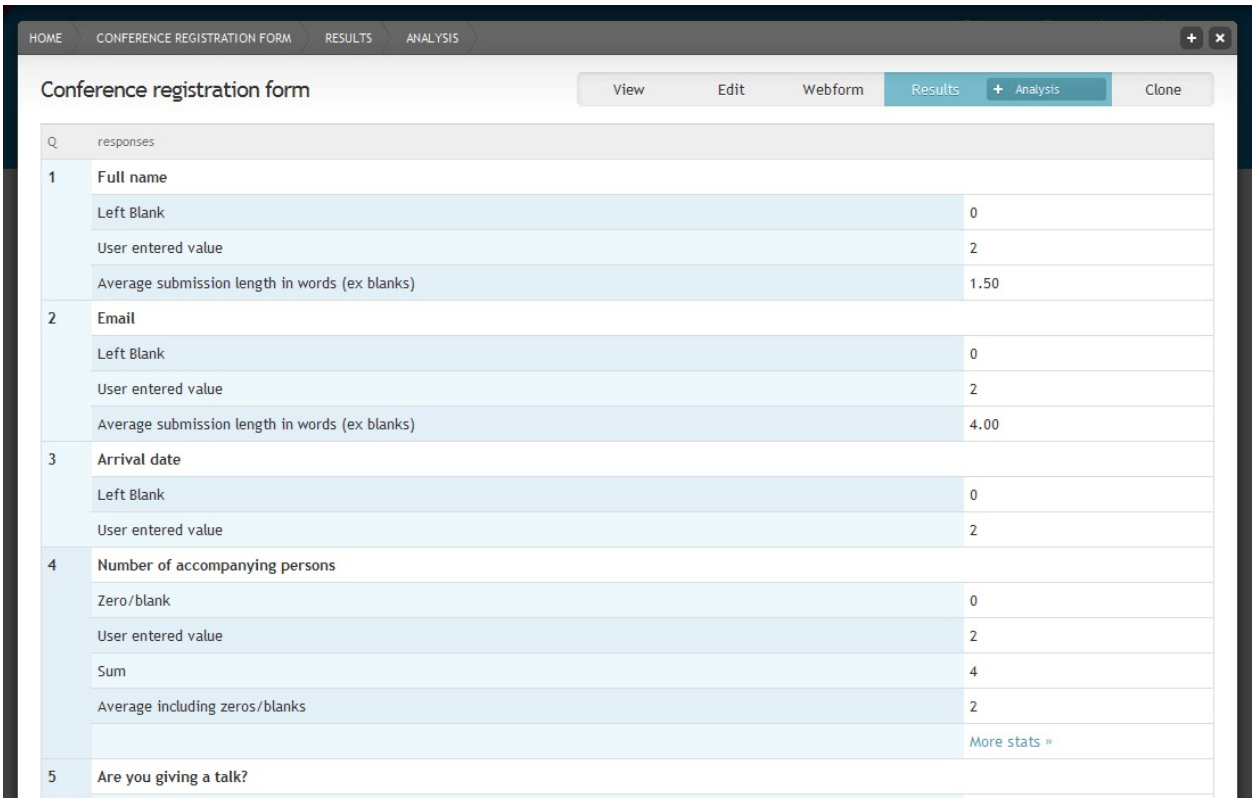


Fig. 16: Analysis of webform results

5. Click on + *Table* and select the + *Download* option to download the results as a delimited text or Excel file. There are various option for selecting the fields and format for the download.
6. The last results option is + *Clear*. This will delete all submission, so be careful before you clear the form.

1.51 Managing comments

The commenting functionality in Scratchpads is a valuable system that enables registered and/or anonymous users to comment on a piece of content (usually a *node*). Maintainers and editors of a site can control the comment functionality per content type and per user role. This means that a Scratchpad site might have comments enabled for a content type (e.g. taxon descriptions) but not for another content type (e.g. specimens/observations).

1.51.1 Comments permissions

Maintainers can change the roles that are permitted to submit comments to a site.

1. From the *Admin menu* go to *People*
2. Under *Comment* select the user groups, according to their roles, that you wish to be able to post comments
3. If *anonymous users* are selected. Visitors of the site will be able to submit comments to be published. By default comments by anonymous users need the maintainer's approval before published in the site
4. Click *Save permissions*

1.51.2 Enable comments for specific content types

Enabling comments for specific content types will not override the access level settings described in the previous section.

1. From the *Admin menu* go to *Structure* > *Content types*
2. Click *edit* next to the content type you wish to modify comment settings
3. Select *Comment settings* from the vertical tab menu
4. Set specific properties for the comments of this content type
   - Closed: No comments can be submitted
   - Open: Anyone can submit a comment provided they have given access, as described in the previous section
   - Hidden: Comments can be submitted, but they are not published

1.51.3 Comment notifications

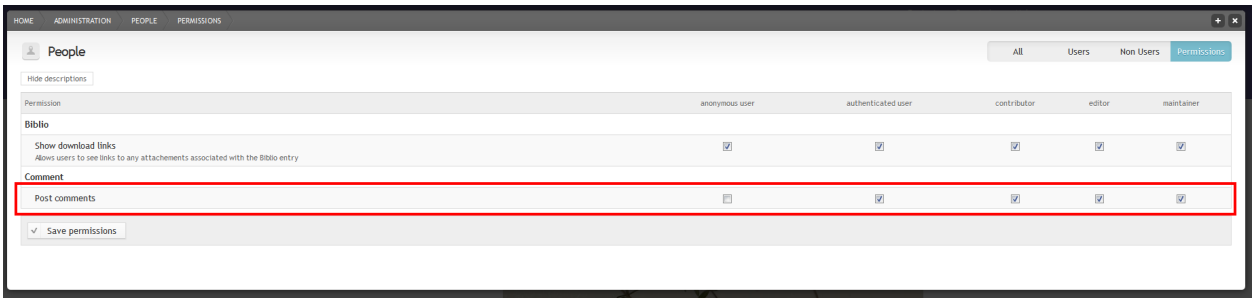
You can modify the settings that define when someone should be notified, via email, when a new comment is posted and also how the notification email is drafted.

1. From the *Admin menu* go to *Configuration* > *Comment notify*
2. Change settings accordingly and click *Save configuration*

1.51.4 Managing comments

Comments submitted by anonymous users are marked as unapproved by default and do not get published until a maintainer has approved them. To approve or delete comments go to

1. On *Admin menu* go to *Content* > *Comments*
2. All published comments are located and can be managed under *Published comments*



3. All unapproved comments can be managed (approved or deleted) under the *Unpublished comments* section
4. Numbers in brackets indicate the total number of comments under these two sections

1.52 Google analytics

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

1. 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 while you enable the Google Analytics module on your Scratchpad.
2. In the *Admin menu* go to *Structure* > *Tools*.
3. Under the *Statistics* section enable Google Analytics and save.
4. 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*.
5. In the WEB PROPERTY ID field enter the enter the UA number given by Google when you signed up.
6. *Save configuration*
7. 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.

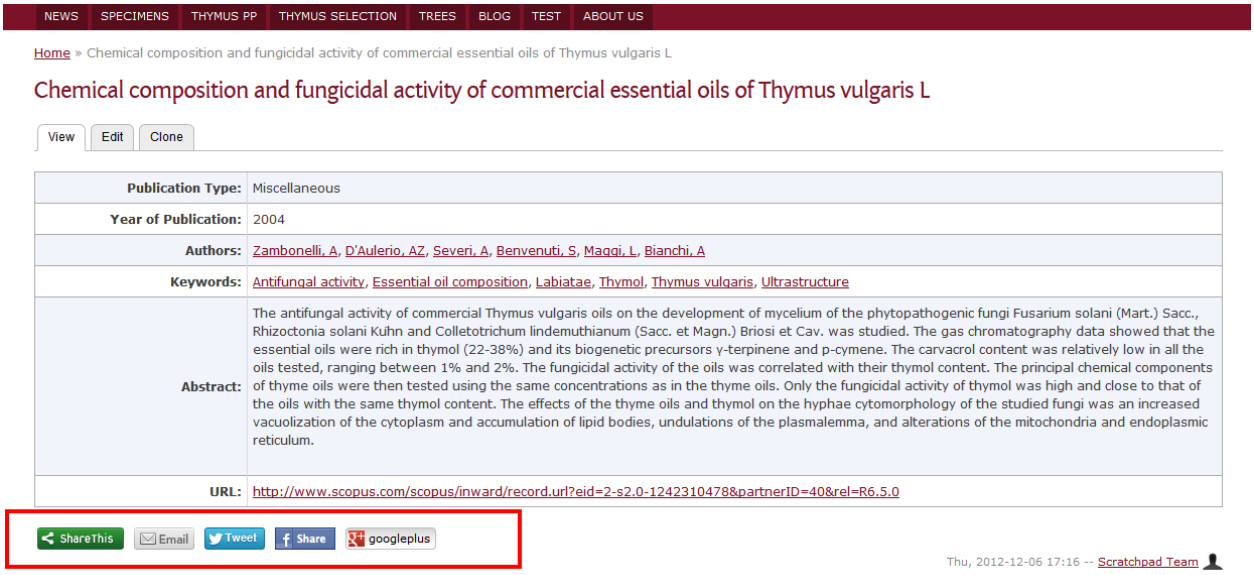
1.53 Share this

The *Share This* buttons can be used by your Scratchpad visitors to easily share content via email and major social media networks (incl. Facebook, twitter)

To activate the *Share this* functionality:

1. From the *Admin menu* go to *Structure* > *Tools*

2. Locate the *Sharing* section in the page
3. Turn the *ShareThis* module on
4. Click Save



1.54 Citing Scratchpads

Scratchpads are a dynamic environment. Site maintainers, editors and contributors can modify the contents of a page at any point. However, as Scratchpads are being used as a source for information in scientific journals and other online resources it is necessary for a visitor to be able to capture the information provided in a page and be able to access this page at any point in time, even when the contents of the page have been modified at a later date.

The *Cite this page* functionality allows visitors to generate a snapshot of the page they visit that is being deposited in a separate secure Scratchpad server with a unique and stable URL. The stored snapshots will remain accessible even if the original source is no longer available.

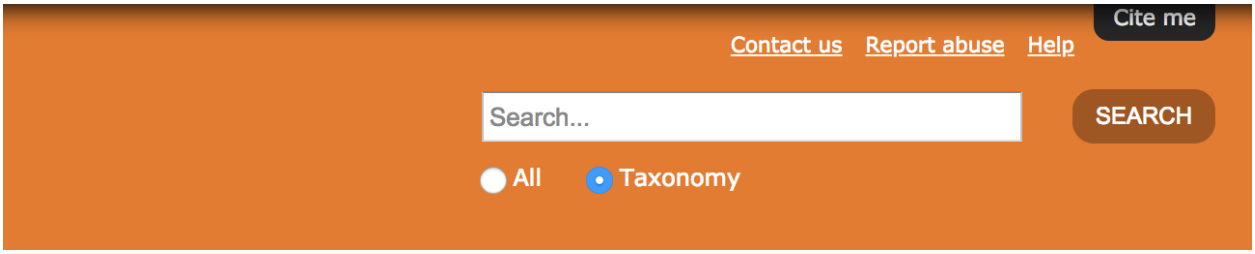
1.54.1 Enabling the module

1. From the *Admin menu* go to *Structure* > *Tools*
2. Enable the *Scratchpads Cite this page* tool under the *Sharing* section
3. Click *Save*

1.54.2 Using the tool

This functionality, once enabled, is available to all registered and anonymous users of the site. Once enabled a *Cite me* button will be available to all pages in a site that have content that can be cited.

- To create a permanent snapshot of a page click *Cite me* on the page you wish to store in our servers.
- The original author as well as the subsequent editors of a node/page are included as authors of the node/page
- The title of the node/page will be used as the title of the created snapshot



- All snapshots are stored as PDF files with relevant annotation embedded

1.55 Customise front page

Click on the *Home* icon to go to the front page.

1.55.1 Welcome title & message

As part of the set-up workflow you will already have produced a welcome message for your front page.

1. To change this, click *Edit*.
2. In *Welcome message* enter the text you want to display
3. By default, the title will be *Welcome to Scratchpad training site*. You can change this by selecting *Override welcome title* and entering your new title.

1.55.2 Images

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 *Images & media*). The image block consists of four thumbnails and one larger image. The larger image changes to the image the mouse hovers over.

You can select which images to display on the home page by:

1. Under *Admin menu* go to *Content* > *Image*
2. Locate the image you wish to use, and click *Edit*
3. Select the option *Promote to home page*

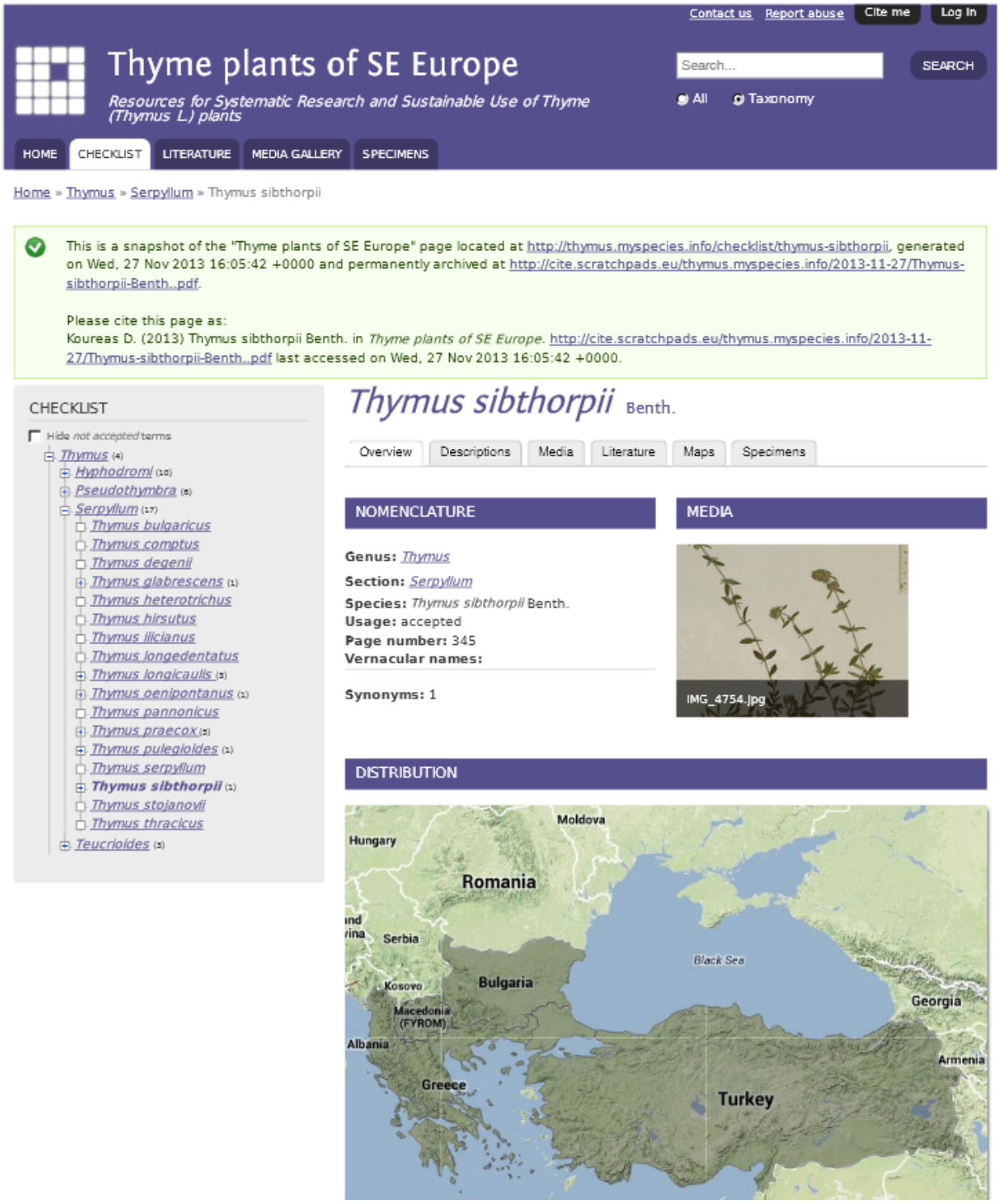
If you would prefer to display a list of content rather than images:

1. On the home page select *Edit*.
2. In the *Main block* section, select *Content*
3. Select the content type to display
4. Select *Save configuration*

1.55.3 Content blocks

The home page also display three blocks of recent content - by default these blocks will show *Page*, *Biblio*, and *Taxon description*.

You can choose different content to display in these blocks.

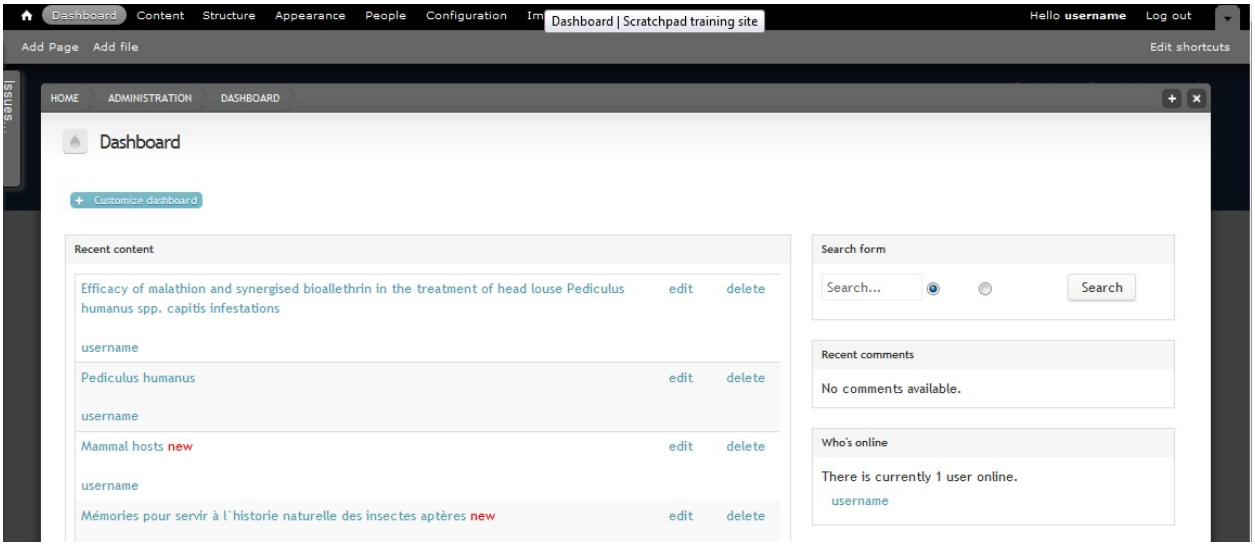

Contact us
Report abuse
Cite me
Log in
Thyme plants of SE Europe
Resources for Systematic Research and Sustainable Use of Thyme (Thymus L.) plants
Search...
SEARCH
All
Taxonomy
HOME
CHECKLIST
LITERATURE
MEDIA GALLERY
SPECIMENS
Home » Thymus » Serpyllum » Thymus sibthorpii
This is a snapshot of the "Thyme plants of SE Europe" page located at http://thymus.myspecies.info/checklist/thymus-sibthorpii, generated on Wed, 27 Nov 2013 16:05:42 +0000 and permanently archived at http://cite.scratchpads.eu/thymus.myspecies.info/2013-11-27/Thymus-sibthorpii-Benth..pdf.
Please cite this page as:
Koureas D. (2013) Thymus sibthorpii Benth. in Thyme plants of SE Europe. http://cite.scratchpads.eu/thymus.myspecies.info/2013-11-27/Thymus-sibthorpii-Benth..pdf last accessed on Wed, 27 Nov 2013 16:05:42 +0000.
CHECKLIST
Hide not accepted terms
Thymus (4)
Hyphodromi (10)
Pseudothymbra (6)
Serpyllum (17)
Thymus bulgaricus
Thymus comptus
Thymus degenii
Thymus glabrescens (1)
Thymus heterotrichus
Thymus hirsutus
Thymus ilicianus
Thymus longedentatus
Thymus longicaulis (3)
Thymus oenipontanus (1)
Thymus pannonicus
Thymus praecox (3)
Thymus pulegioides (1)
Thymus serpyllum
Thymus sibthorpii (1)
Thymus stojanovii
Thymus thracicus
Teucrioides (3)
Thymus sibthorpii Benth.
Overview
Descriptions
Media
Literature
Maps
Specimens
NOMENCLATURE
Genus: Thymus
Section: Serpyllum
Species: Thymus sibthorpii Benth.
Usage: accepted
Page number: 345
Vernacular names:
Synonyms: 1
MEDIA
IMG_4754.jpg
DISTRIBUTION
Moldova
Hungary
Romania
Serbia
Black Sea
Kosovo
Bulgaria
Georgia
Macedonia (FYROM)
Albania
Armenia
Greece
Turkey

1. On the home page select *Edit*.
2. In the *Small blocks* section, select which content type to show in each of the three blocks.

1.56 Customise dashboard

1.56.1 Instructions

1. In the *Admin menu* go to *Dashboard*.
2. By default the Dashboard shows the *Recent content* block. You can add more blocks by clicking on the *Customise dashboard* link at the top.



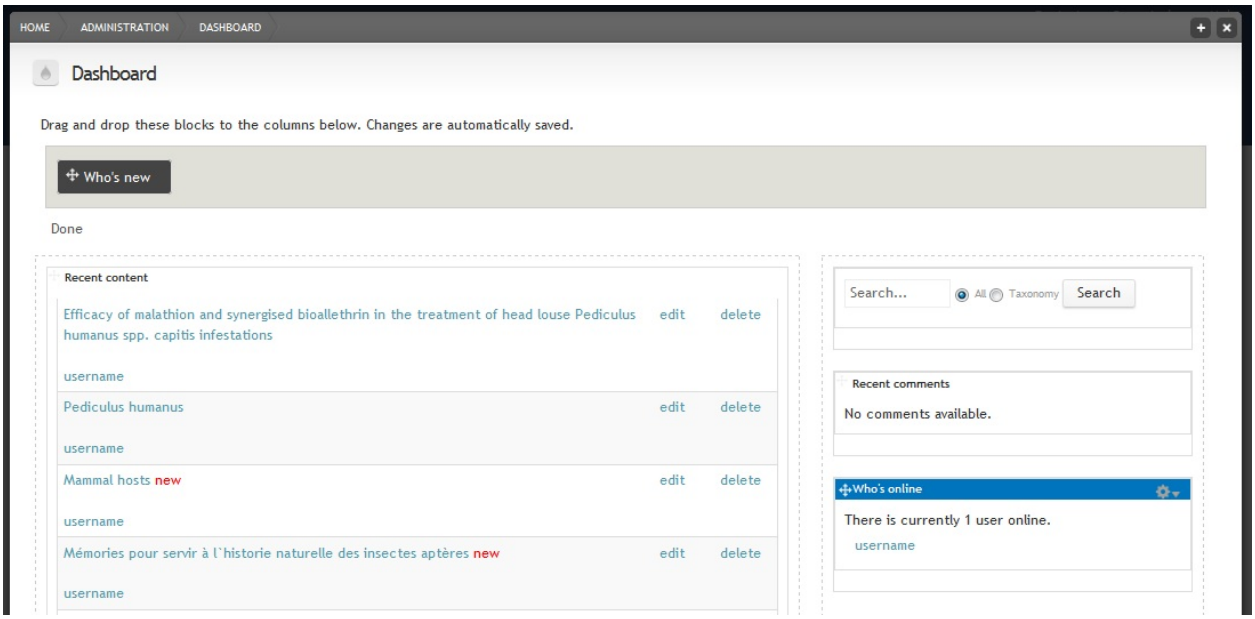
2. A selection of inactive blocks is shown in black at the top. Drag and drop these blocks into the columns below. The wider column to the left is the main dashboard area, the smaller column to the right is called the sidebar area.
3. Click the *Done* link to go back to view the dashboard.

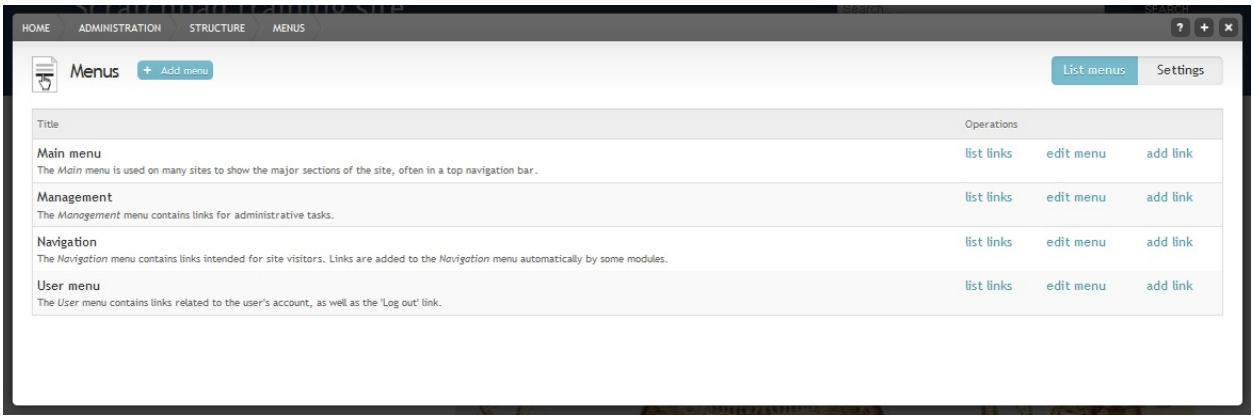
1.57 Customise menus

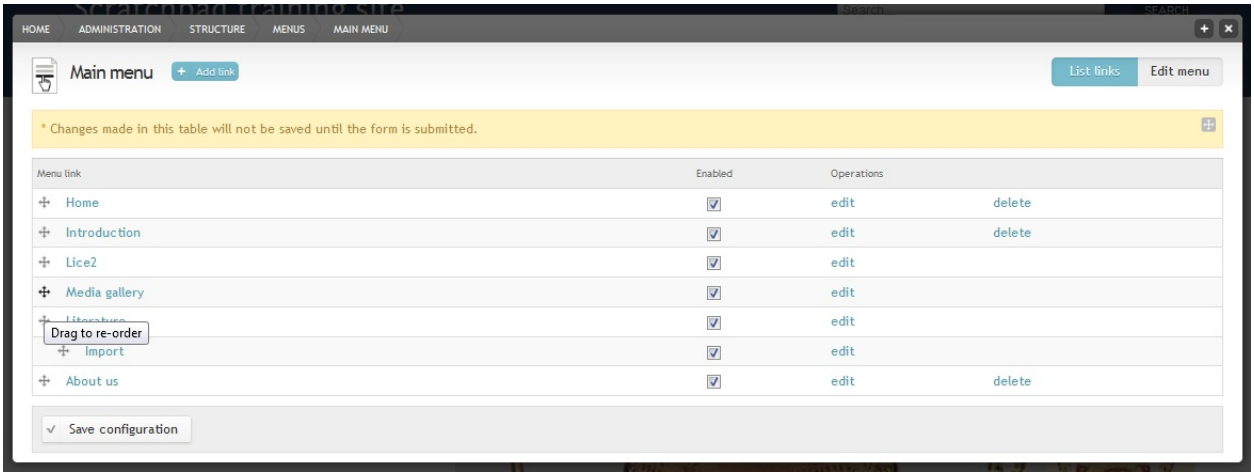
1. In *Admin menu* go to *Structure* > *Menus*.
2. Next to *Main menu* click *List links*.
3. Drop and drag the menu items to rearrange into the preferred order
4. Click *Save configuration*.

1.58 Customise shortcut menu

The shortcut menu is the light grey bar beneath the *Admin menu*. If you use a particular administration page frequently, it can save time to add a shortcut link here.


HOME
ADMINISTRATION
DASHBOARD
Dashboard
Drag and drop these blocks to the columns below. Changes are automatically saved.
Who's new
Done
Recent content
Efficacy of malathion and synergised bioallethrin in the treatment of head louse Pediculus humanus spp. capitis infestations
edit
delete
username
Pediculus humanus
edit
delete
username
Mammal hosts new
edit
delete
username
Mémories pour servir à l'historie naturelle des insectes aptères new
edit
delete
username
Search...
All
Taxonomy
Search
Recent comments
No comments available.
Who's online
There is currently 1 user online.
username

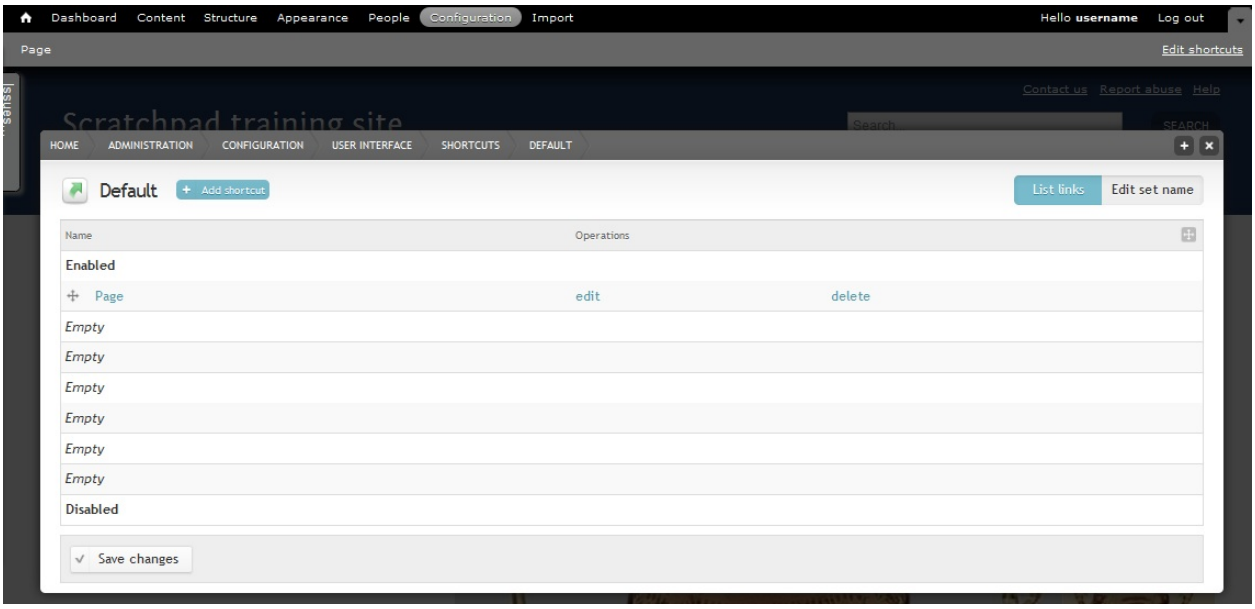

HOME
ADMINISTRATION
STRUCTURE
MENUS
Menus
Add menu
List menus
Settings
Title
Operations
Main menu
The Main menu is used on many sites to show the major sections of the site, often in a top navigation bar.
list links
edit menu
add link
Management
The Management menu contains links for administrative tasks.
list links
edit menu
add link
Navigation
The Navigation menu contains links intended for site visitors. Links are added to the Navigation menu automatically by some modules.
list links
edit menu
add link
User menu
The User menu contains links related to the user's account, as well as the 'Log out' link.
list links
edit menu
add link


HOME
ADMINISTRATION
STRUCTURE
MENUS
MAIN MENU
Main menu
Add link
List links
Edit menu
* Changes made in this table will not be saved until the form is submitted.
Menu link
Enabled
Operations
Home
edit
delete
Introduction
edit
delete
Lice2
edit
Media gallery
edit
edit
Drag to re-order
Import
edit
About us
edit
delete
Save configuration

Dashboard
Content
Structure
Appearance
People
Configuration
Import
Hello username
Log out
Add Page
Add file
Edit shortcuts

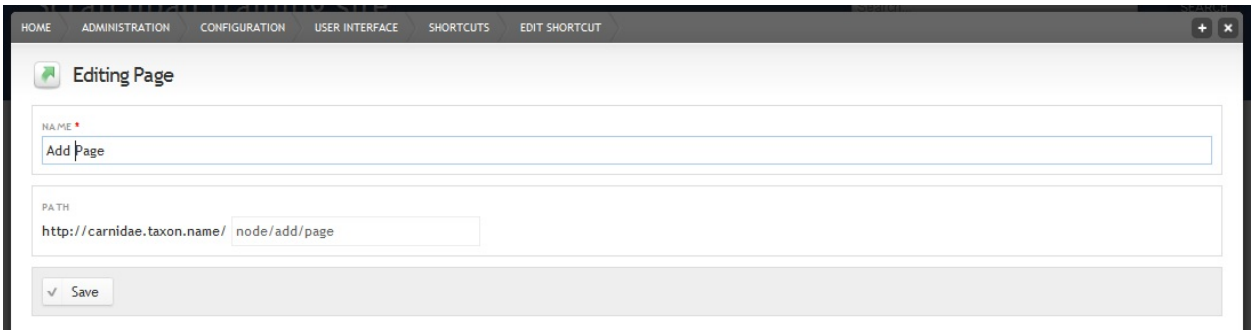
1.58.1 Add a shortcut

1. To add a shortcut simply go to the administrative page you want to link to
2. Click on the plus icon in the upper right corner. This creates a link in the shortcut menu.



1.58.2 Edit shortcuts

1. 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.



3. Click on *Edit* to change a name. Click *Save*.
4. Drag and drop menu items to change the order. Click *Save changes*.
5. 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". Click *Save*.

The default shortcut set is customised by the site maintainer but each user can create and customise 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.

1.59 Custom content type on taxon page

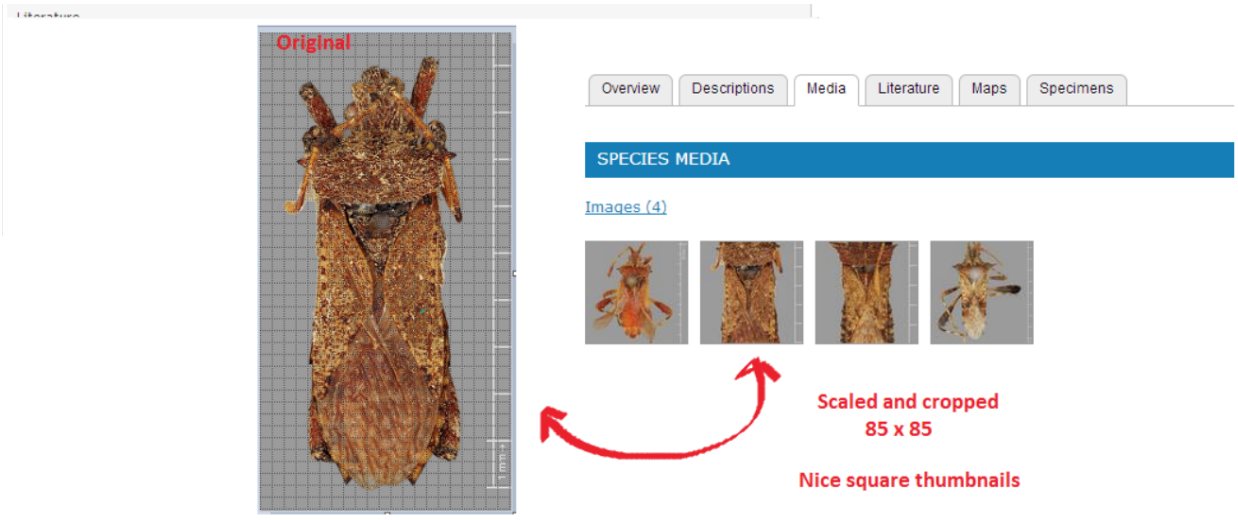
If you have a new content type you'd like displayed on the classification taxon page:

1. In the *Admin menu* go to *Structure* > *Content types*
2. Click *Edit* for the content type you want to display
3. Click on the *Display settings* tab near the bottom of the page and check *Display on species page*.
4. A new set of options appear in which you can check where the block is supposed to appear. It can either appear on its own tab or under one of the existing tabs. Select one option.
5. Click *Save*

TIP: The content type must have a taxonomic name field corresponding to the classification species page.

1.60 Formatting thumbnails

By default, thumbnail images on a Scratchpad are resized and cropped to fit an 85x85 pixel frame.

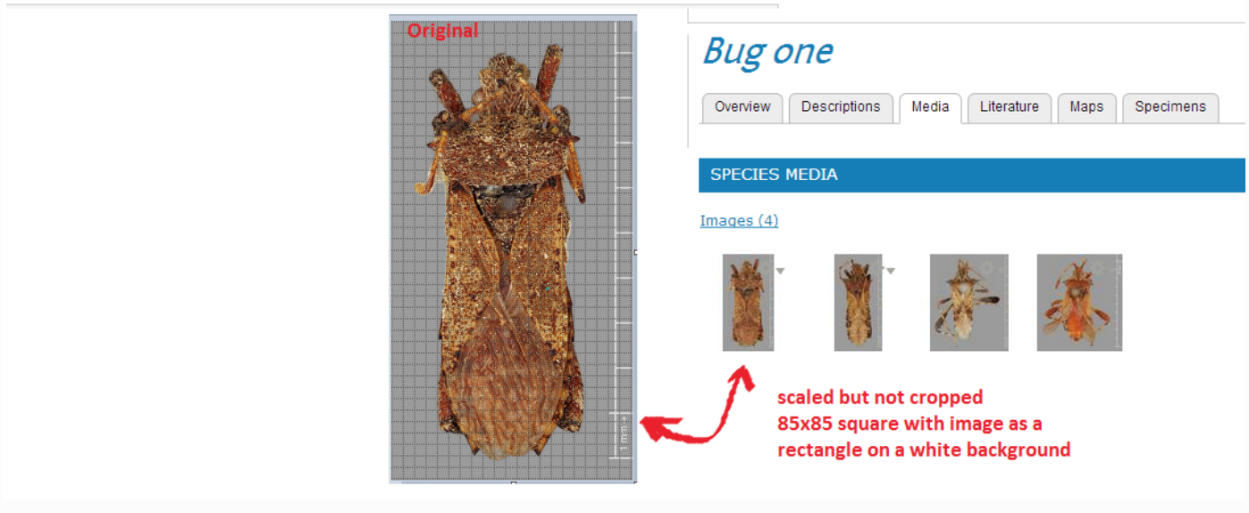


This provides a clean and easy way to browse thumbnail gallery - but does have the drawback that some image content will be missing from the thumbnail.

If this is a problem for your Scratchpad you can enable the *Full thumbnails* option which will display a miniature version of the entire image without cropping.

To enable *Full thumbnails*:

1. From the *Admin menu* go to *Structure* > *Tools*
2. Go to section *Images*
3. Turn the *Full thumbnails* on
4. Click *Save*



1.61 Nomenclatural status

Scratchpads follow the ITIS scheme (see *Itis standard fields*). When setting a term of a biological taxonomy as not accepted you are also expected to provide the unacceptability reason for it.

To accommodate the different nomenclature common practices followed by both IBN and ICZN, we provide adjusted lists of unacceptability reasons.

The following table illustrates how terms will be designated in the classification tree when a specific unacceptability reason has been selected.

Unaccepability reason	Mark in classification	Position in relation to term
database artifact	artifact	suffix
heterotypic (taxonomic) synonym	=	prefix
homonym (illegitimate)	nom. illeg.	suffix
homonym & junior synonym	= & nom. illeg.	prefix & suffix
homotypic (nomenclatural) synonym		prefix
horticultural	horticultural	suffix
invalidly published, nomen nudum	nom. inval.	suffix
invalidly published, other	nom. inval.	suffix
junior homonym	homonym	suffix
junior synonym	=	prefix
misapplied	misapplied	suffix
nomen dubium	nom. dubium	suffix
nomen oblitum	nom. oblitum	suffix
objective synonym		prefix
original name/combination	basionym	suffix
orthographic variant (misspelling)	nom. inval.	suffix
other	unplaced	suffix
pro parte	= & p.p.	prefix & suffix
rejected name	nom. rej.	suffix
subjective synonym	=	prefix
subsequent name/combination	n. comb.	suffix
superfluous renaming (illegitimate)	nom. illeg.	suffix
synonym	=	prefix
unavailable, database artifact	artifact	suffix
unavailable, incorrect original spelling	nom. inval.	suffix
unavailable, literature misspelling	nom. inval.	suffix
unavailable, nomen nudum	nom. illeg.	suffix
unavailable, other		

1.62 Enable pretty URLs

Enabling *Pretty URLs* generates user-friendly URL aliases, based on the title of the content being edited/created.

For example, a page titled "About this site" will be accessible under the URL *about-this-site*, not just *node/x*. This also might help your pages rank high in search engine results.

To enable *Pretty URLs* on your Scratchpad:

1. In the *Admin menu* go to *Structure* > *Tools*.
2. In the *Other* section enable *Pretty URLs*
3. Click *Save*.

1.62.1 Bulk update existing content

If you have already created content, you can bulk update the URLs.

1. Under *Admin menu* go to *Configuration*
2. In the *Search and metadata* section, select "URL aliases"
3. Select the *Bulk update* tab.
4. Select the content types you want to to generate URLs for.
5. Select *Update*

1.63 Sitemap

The sitemap provides a way for people to more early find and navigate content on your Scratchpad.

1. Under *Admin menu* go to *Structure* > *Tools*
2. In the *Other* section turn the Sitemap on
3. Click save

You can view the sitemap at SCRATCHPAD_URL/sitemap

1.63.1 Add menu item

For members of the public to find and use your sitemap, you need to create a menu entry for it.

1. Under *Admin menu* go to *Structure* > *Menu*
2. The Sitemap module creates a disabled menu item. Click *List links* within the *Navigation* menu.
3. Find the sitemap menu item and click "Edit"
4. Check the *Enabled* option.
5. Change the *Parent link* to *Main menu*.
6. Click *Save*

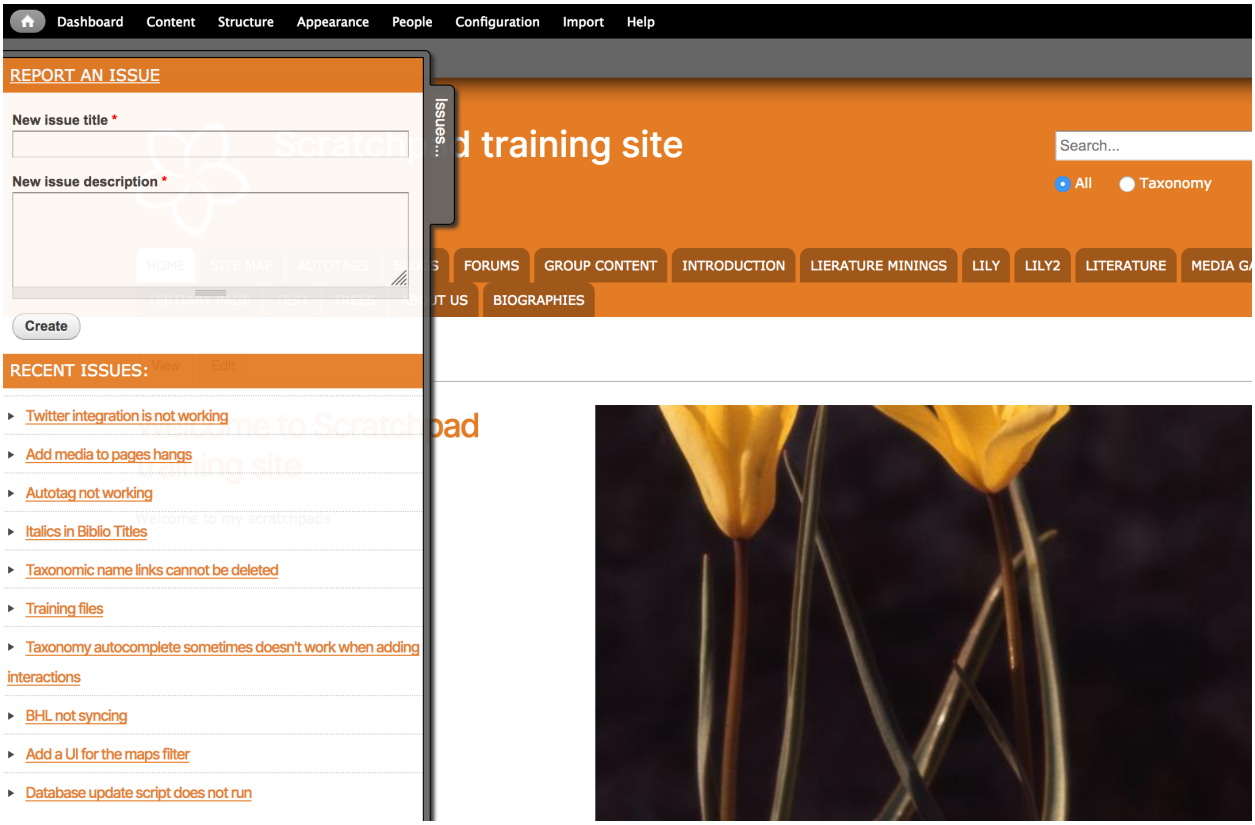
1.64 Help and support

If you have any issues with your Scratchpad, require any assistance, or would like to request a new feature, please use our Issue Queue. You will need to sign up for a user account on Github.

To make it easier to view and post new issues, you can do so from within your Scratchpad using the issue tab (no Github account required). This 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. If you are having an issue it's very likely others will have the same issue. By asking the question you're helping the community and it will often lead to us fixing a bug or improving our documentation.



1.64.1 Service updates

For downtime or performance alerts, please see our Blog or Twitter.

Our blog is also a useful source of information on Scratchpad Releases and future plans for the platform.

1.65 Glossary

Admin menu Menu line at top of Scratchpad that gives access to administrative pages. The Admin menu is only visible to authenticated users who have logged in.

Anonymous A visitor to a Scratchpad who is not logged in. Scratchpads consider any such visitor as being an anonymous user and belonging to the anonymous user role.

Authenticated A visitor to a Scratchpad who is logged in. An authenticated user is able to access non-public content and create and edit own forum posts but no other content if he doesn't have an additional user role (see *Roles*).

Autotagging An automated process that adds tags to content by analysing the text of content and searching for terms in a taxonomy.

Basic page A standard content type in Scratchpads. Typically basic pages are used for static content that can (but are not required to) be linked into the sites' menus. An example might be a general introduction to a taxonomic group or information about the contributors to a Scratchpad.

Biblio The Scratchpad bibliography management module, used to add, organise and browse bibliographic content such as journal articles, books and monographs. Biblio nodes are a type of content and can be exported in different formats (*BibTeX*, *RTF*, *Tagged* and *XML*).

BibTeX Pronounced Bib-Tech. One of several reference managers, notable because it is open source and freeware. Biblio can export references in BibTex format (*.bib)

Biodiversity Information Standards A non-profit organisation (previously Taxonomic Databases Working Group) formed to establish international collaboration among biological database projects including the development of standards for the exchange of biological/biodiversity data. Scratchpads use TDWG standards for specimen, taxon descriptions and locality records (Darwin Core and the World Geographical Scheme for recording plant distributions). See http://www.tdwg.org

Block The 'boxes' visible in the sidebar of a Scratchpad and on taxon pages. Most blocks (e.g., taxonomies) are generated by various Scratchpad modules, but they can be created in the administer blocks area of a Scratchpad. See the documentation for more information on blocks.

Blogs Blogs (contraction of "web" + "log") are used to create and manage a series of regular content entries, like general status updates, a travel diary or a running commentary (e.g. http://iphylo.blogspot.com. Readers can optionally comment on blog entries. They are a good way of communicating with the users of a Scratchpad.

Breadcrumbs The section, usually near the top of the page and below the *Main menu*, that shows where you are in the sites' navigation system. For example, it might show Home > Biology > Life Cycle > Mating, meaning that you are at the page on Mating, which is part of the Life Cycle section, which is in turn part of the Biology section. The term breadcrumbs is borrowed from Hansel and Gretel, who left crumbs of bread along their path so they could find their way back out of the forest.

Browser See *Web browser*

Character project A module for managing taxonomic characters that can be exported in different standards. Data are managed in a matrix structure, comparable to a spreadsheet.

Child For objects that can have hierarchical relationships, (such as taxonomies and menu items). A "child" menu item, for example, is nested under another menu item, which is referred to as the "parent" menu item.

CMS Content Management System: a collection of tools designed to allow the creation, modification, organisation and removal of information. Drupal is the CMS used by Scratchpads.

Content The text, images, and other information on a web site. Besides *nodes* a typical Scratchpad will contain other material, such as comments and files. Collectively these are content and are the intellectual property of the Scratchpad community that created them.

Content type Every node belongs to a single "content type" (sometimes called "node-type") that defines various settings such as the node's fields, whether comments are permitted, who can see the node (see permissions) etc.

Controlled characters Controlled characters can be used for phylogenetic analyses or interactive keys. The character is separated into two or more character states. Each characters state is attributed a number, starting with zero.

Countries map The countries map content type can be used to produce shaded presence/absence maps for taxa. The map regions are based on the TDWG distribution standards.

Cron An automated command that is to be executed at a specified time.

CSV Comma-separated values, a file where tabular data are separated with commas.

Darwin Core Darwin Core (DwC) is a standard for sharing biodiversity information. Scratchpads use the DwC standard for location and specimen information. Read the introduction to the Darwin Core standard.

Dashboard An easy to read user interface that gives an overview of important site information. You can access the Dashboard from the Admin Menu.

Drupal A free and open-source content management system (CMS), used by Scratchpads. About Drupal

Editor This term has two meanings in Scratchpads: - One of the categories of user permissions (see *roles*) - A program used for editing data. The most frequently encountered editors in Scratchpads are the WYSIWYG editor and the taxonomic editor.

EndNote 8+ XML An EndNote file format used for exporting references from the bibliographic software, EndNote.

Entity Any defined chunk of data in a Scratchpad. This includes things like terms in a taxonomy, users, files, etc.

Encyclopedia of Life (EOL) A project to provide global access to knowledge about life on Earth. EOL is a partner of the Scratchpad project. See http://www.eol.org.

Faceted browsing Narrow down search results by applying multiple filters based on faceted classification of the items.

Favicon See *Shortcut icon*

Field Elements of data that can be attached to a node or other Scratchpad entity. Fields commonly contain text, image, or numerical values, but there are many other data types. It is possible to create and customise fields in CCK.

Forum A place in a Scratchpad where people can have online discussions by posting messages to each other. Forums (fora) are hierarchical and can contain subforums (subfora) with different discussion topics.

GBIF The Global Biodiversity Information Facility (GBIF) promotes and facilitates the mobilization, access, discovery and use of information about the occurrence of organisms over time and across the planet. See http://gbif.org.

Git A version control system used by Scratchpad developers to coordinate their individual code changes. Git records everyone's changes to a given project in a directory tree called a git repository. The Scratchpad source code is downloadable from our Git repository https://github.com/NaturalHistoryMuseum/scratchpads2.

Google Maps API key A free key code that allows a Scratchpad to generate unique Google maps from its data.

Grid editor An Excel-like matrix editor (Slickgrid) for bulk updating content.

Groups Groups can be used to organise and control access to content. Groups can be visible and open for all users to join or hidden with membership controlled by the site maintainer.

GUID GUID stands for Global Unique Identifier. GUIDs can be assigned by users for each term used in Scratchpad. GUIDs must be unique in the Scratchpad environment. If a user does not assign GUIDs to terms the system will generate them automatically. GUIDs of taxonomic terms are also displayed in the taxonomic editor on the left of the taxon name being edited.

HTML Hypertext Markup Language, used for writing the basic parts of a webpage. Web browsers read and interpret HTML to compose web pages for a user.

Image Individual or multiple images can be uploaded to a Scratchpad using the image module. Images can be classified using a taxonomy, linked to a specimen record or a publication and categorised by subject. Allowed file formats are GIF, JPEG, PNG and the default size limit is 50MB.

Integrated Taxonomic Information System (ITIS) A partnership that maintains an online database of species names and their higher classification. ITIS is a member of the Catalogue of Life consortium. They have developed a data standard which is used by Scratchpads. See http://www.itis.gov.

Issue Issues are used to report problems with the Scratchpads (e.g. a bug report, missing documentation) or to request a feature. Site maintainers have access to an issues tab on the right of their browser window through which they can examine issues already raised, their status and solution, or raise a new issue.

Javascript A programming language used to perform actions on the user's computer, most commonly the mechanism by which web pages become 'dynamic' or interactive. JavaScript is a setting in your browser preferences and should be turned on for best performance of these pages.

Location A location node stores information about a named locality. Location data may be linked to specimen data or other content types you create. Scratchpad location data conform to Darwin Core (version 1.2.1) and GBIF standards.

Main menu The menu line below the header that gives access to Scratchpad content.

Maintainer The site owner, responsible for moderating and maintaining the site (see *roles*).

Matrix editor (Slickgrid) See *grid editor*.

Media gallery Media galleries are used to sort media into meaningful categories. The images in a media gallery can be viewed through a kind of slide show.

Menu Refers to grouped clickable navigational elements on a page. They are often found in the sidebars or at the top of a page. Two default menus are displayed on a site and are referred to as *Admin menu* and *Main menu*. Menus are controlled by site maintainers.

Module Software that extends Drupal functionality to do a particular, well-defined task. Many modules exist in public libraries (http://www.drupal.org) and are known as 'contributed modules'. Scratchpads have developed many modules unique to the project. (see 'Git' above).

Newsletter Newsletters can be used to keep a Scratchpad community informed about site-related matters. Newsletters can be distributed via email using a list of subscribers.

Nexus or Newick data Phylogenetic data formats for constructing phylogenetic trees.

Node A piece of content in a Scratchpad, typically corresponding to a single page on the site, that has a title, an optional body, and usually additional fields. Every node is of a single content type, and can additionally be classified using the taxonomy system. Examples of nodes are basic pages, bibliographic entries (Biblio nodes), localities, polls, specimens and images.

Node type See content type.

Overlay Editing as well as any administrative functions are done in an area superimposed over the page where this function was accessed from.

Page See *Basic Page*

Parent See *child*

Patch A small piece of software designed to update or fix problems with a computer program or its supporting data. This includes fixing bugs, replacing graphics and improving the usability or performance. Patches are applied by the team maintaining a Scratchpad installation.

Path In Scratchpad terms, a unique, last part of the URL for a specific function or piece of content. For instance, for a page whose full URL is http://example.com/node/7 the path would be "node/7". N.B. This is a slightly different usage to that normal in IT, see 'breadcrumbs' above.

Permission In Scratchpads, a method for controlling access to content creation, modification and site administration. Many tasks (e.g. creating a node) require the user to have a certain permission in order for them to perform that task. Permissions are used to make pages invisible to certain groups, e.g. anonymous users, amongst other things.

Phylogenetic tree A content type that displays relationships of taxa in a branching tree diagram.

Poll The Poll module allows you to create multiple choice polls/questionnaires.

Profile A set of fields containing information about each user. The minimum profile information is username and e-mail address and maintainers can set additional fields, either optional or required from everyone during registration. Additional information typically will include name and institutional address. Profiles are usually kept confidential to maintainers, but can be summarised for others (see Permissions). Profiles can also be used to contain bibliographic/historical information about non-users.

Published A published node can be viewed by visitors to the website. An easy way to hide nodes from the public (i.e. anonymous role) is to make the node unpublished by unchecking "Published" in the node add/edit form.

Region Defined areas of a page where content can be placed. Basic regions include: Header, Footer, Content, Left sidebar and Right sidebar. Content is assigned to regions via blocks. They can be ordered by weight within regions to define the order in which they display.

Regular expressions Regular expressions are sequences of characters that form search patterns, mainly for use in pattern matching with strings, or string matching. To enable Scratchpads to read regular expressions (wherever applicable) append the character "/" at the start **and** at the end of your regular expression string.

Rich text editor A tool to easily format text similar to a word processor. See *WYSIWYG*.

Roles Sets of permissions that can be applied to individual users. Every user is assigned to at least one role that defines their rights to access and change areas of the site. The default roles are **Maintainer** (site owner), **Editor** (able to create, edit and delete content), **Contributor** (able to edit content), **Authenticated user** (able to access non-public content) and **anonymous user**.

RSS Really Simple Syndication. A family of Web feed formats used to publish frequently updated content such as blog entries, news headlines or podcasts. An RSS document (which is called a "feed", "web feed" or "channel") contains either a summary of pages (see "teasers", below) from an associated web site, or the full articles. RSS is one of the many ways of connecting a Scratchpad with other sites, systems and data.

RTF Rich Text Format – A file format for text documents that can be opened by most word processors. It allows a limited amount of text formatting (e.g. bold, italic, font colours). Biblio can export references as RTF files.

Sandbox A test Scratchpad site where any user can experiment. Any content you put in the sandbox will be not be permanent as we automatically delete Sandbox content every 6 hours. Sandbox content can also be edited by other users. Scratchpads Sandbox site

Shortcut icon A small icon representing the site that is shown in your browser or as the shortcut icon when you bookmark/favourite a page.

Shortcut menu A customizable menu, located below the Admin menu, containing links to administrative pages that are frequently used.

Sidebar A region to the left or the right of a page where blocks and/or content (often menus or links) are displayed.

Specimen Specimen data that, usually together with a Location, is used in the creation of specimen records. Scratchpad specimen data conform to Darwin Core (version 1.2.1).

SPM Species Profile Model (SPM) is a standard developed by Biodiversity Information Standards (TDWG) for information about taxa. It is used by Scratchpads for descriptive information about taxa. http://rs.tdwg.org/ontology/voc/

Tabs Tabs refer to buttons that change the display of information on a page, without navigating away from it, in the same sense as most browsers. An example is the taxonomy editor interface, which has four tabs (Scientific Name, Usage, Reference and Vernacular Names) which display different data entry forms. Tabs are a specific type of menu.

Tag A tag is a term used to classify content. Tags usually come from a taxonomy and can be added to content manually or automatically.

Tagged

Tagged may refer to:

- (Endnote) Tagged files are used by the reference management program EndNote. Biblio can be export references as Tagged files.

- The classification of content using terms, see Taxonomy. Some tags are added automatically, see autotagging.

Taxon Description Content that provides descriptive data about taxa (not specimens). Scratchpads use the TDWG SPM standard for taxon descriptions.

Taxonomy This term has two meanings in Scratchpads:

- In IT, a taxonomy is a hierarchical organisation of "terms", i.e. organisational keywords known in other systems as categories, tags, or metadata. These terms are gathered within lists called "vocabularies".
- The biological use of 'taxonomy' is a special application of this general term.

In Scratchpads the Taxonomy module has been modified to accommodate the biological use of the term 'taxonomy', while also providing the facility to create and manage these vocabularies. Most importantly, the terms in the vocabulary lists are attached to individual content elements as tags, allowing content to be assembled on a single page. There is an automatic process (autotagging) that adds tags to content by analysis of the content. Tags can also be added manually for enhanced linkage.

Taxon page A page that can display multiple widgets that contain various data about a taxon. Users can control which widgets are displayed, their size and position.

TDWG See *Biodiversity Information Standards*

TDWG regions A standard for biogeographic regions defined by *Biodiversity Information Standards* (formerly TDWG). See https://github.com/tdwg/ontology/blob/master/ontology/voc/GeographicRegion.rdf.

Teaser A short introductory sentence or paragraph about a piece of content that informs readers about the subject of the content. By default, the first paragraph or two of the content is used (there is a setting for how much), usually with a link to the complete node. The intention is that teasers provide an expanded index to pages over a simple list of page titles.

Theme A graphical package that changes the look and feel of a Scratchpad.

TID TIDs (Term ID) is a unique sequential number given to each of the terms in the Scratchpads taxonomies. TIDs can be used in Excel templates to refer to taxonomic terms instead of the term name or the GUID. TIDs are being displayed in the taxonomic editor on the left of the term name being edited.

TinyMCE A WYSIWYG editor.

Tinytax A block which displays a classification in a graphical interface.

Unpublished See *published*

URL Uniform Resource Locator. Also known as a web address, a URL is a human readable address for content (like a page) on an Internet server e.g. http://www.scratchpads.eu/node/937

User roles See *Roles*

Views A module for controlling the presentation of lists and tables of content.

Vocabulary See *taxonomy*

Web browser Software for navigating, retrieving and displaying data on the World Wide Web. The major web browsers are Internet Explorer, Firefox, Google Chrome, Safari and Opera. Browsers vary in their capacities and facilities and not all pages will display or behave properly in all browsers. Scratchpads are developed in Firefox, which is the recommended browser for these pages.

Webform Webforms are used to collect information from users. The completed form, when submitted, can be sent for processing, for example a survey, or processed locally, for example content creation.

Weight A term used by Scratchpads to define the order of display in a block or node. For blocks the weight field is adjusted using a drag-and-drop interface. Note: A lower weight value (-10) will float to the top of lists, while heavier (+10) weights will sink lower in lists.

WYSIWYG What You See Is What You Get. An acronym used in computing to describe a method in which content is displayed while editing in a format that closely resembles the final result. Most word processors are WYSIWYG.

XML eXtensible Markup Language (XML) is a common standard for encoding data in a way that can be easily interpreted by computers and people. Scratchpads export data in XML for processing by external services, e.g. in the publication module.

CHAPTER 2

Useful links

Scratchpads platform Find information about Scratchpads, browse through sites and apply for a new Scratchpad site http://scratchpads.eu

Issues queue Report an issue, ask your questions or find answers or to request a new feature https://github.com/NaturalHistoryMuseum/scratchpads2/issues

Sandbox Experiment with all Scratchpads features through this fully functional test site that resets every 6 hours. http://sandbox.scratchpads.eu

For any other questions or queries, please contact as at scratchpads@nhm.ac.uk.

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