

ADVANCED ADMINISTRATION

Course Notes

Objectives

At the completion of this course the Student should:

- Increase overall understanding of BDRS role & capabilities
 - Theming for target audiences
 - Enhanced Species Page
 - Enhanced Surveys – including non-taxonomic
- Develop greater understanding of BDRS components
 - Importing & managing Taxonomy
 - Importing records
 - Preferences
 - User Management
 - Editing Content
- be able to apply this understanding to their own sites and information

Who the course is aimed at

This course is aimed at people who will be performing day to day administration of their BDRS implementation.

They will probably be an amateur scientist/naturalist with a good understanding of core data capture concepts to meet scientific quality and accuracy requirements for their areas and species of interest.

They will most probably be involved in the initial implementation stages of their BDRS project.

They will be competent PC/Mac users familiar with the usual office, web, and email applications.

They will most probably not have any software programming skills.

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ALA Field Data Capture – the BDRS

Quick review of Basic Admin course

- reference on line materials
- summary of basic course
 - o focused on 2 key components
 - taxonomy
 - survey
 - o where BDRS fits in
 - o shaping the BDRS to target user requirements

Advanced Admin course

- further develop understanding of BDRS scope and capabilities
- help stimulate ideas on how you can use it, and use it better
- the interface is the key
 - o themed
 - o taxonomy and its role in your site
 - o surveys and your target users
- look at other parts of the system we haven't met before

Talk about futures and working together

Approach

Start by going through the Admin Menus and closing the gaps with the 'easy' bits

There are quite a few bits to look at but most are conceptually simple.

We haven't written all of the documentation for them yet but working on it!

Why not?

- It's a slow process and involved interactive software and documentation change processes.
- Our users haven't been ready for it and we have been looking after the shop (or not using as appropriate)

USER ADMINISTRATION

Revisiting and extending on the registration process

User Registration process

- Approving new users (preference setting)

User Management			
Portal settings for user management.		Enlarge Table	Add User Management Preference
Description	Key	Value	Delete
Set this value to 'true' if an admin must approve user accounts they become active.	user.account.approvalRequired	<input type="text" value="false"/>	N/A

- still in development - controlling who is allowed to sign in

Managing Users

- Search
- Resetting passwords
- Roles
- Known issues
 - o can't delete
 - o search wild card is empty

Managing Groups

- Creating & editing groups
- Known issues (V1.0 nested groups)

Emails

- Sending emails (Bryans Subject Point; junk mail)
- Editing email messages
- Editing and saving as your own template
- Expose list of email templates: many of them have no use in current builds (legacy)

MANAGING PROJECTS/SURVEYS

Revisiting and extending on the surveys

Focus on form types; taxonomic vs. non-taxonomic surveys; moderation with comments; further usability enhancements - maps

Workflow

Options

- Form types
- Default, atlas, calendar, multi- and all- species
 - o Atlas - need to supply a taxa id on the URL
 - o eg <http://sh-birds.ala.org.au/bdrs-core/bdrs/user/tracker.htm?surveyId=11&taxonSearch=Malurus%20cyaneus>
- Record visibility

Taxonomy

- questions

Form Builder

- Field Scope Options
- questions

Locations

- questions

Access controls

- questions

Extending basic surveys

Formatting surveys - revisit

Adding on screen Help text

Mapping enhancements – S2S

- Simple map zoom
- Adding layers to maps
 - o Concepts
 - o Cut & paste code – in themes

Non-Taxonomic

Peter Brenton

Using Census Methods

Specific examples

Moderation

- Review How it works
 - o Survey form – field scope
 - o Thresholds – catch all
 - o Email – editing content

- Access controls – role based
- Demonstrate previous hand coded model – with issues
- Describe the plans
 - created & edited by etc;
 - adding the comments capability and using it in moderation

Reference

This section covers Project/Survey components of the Basic Administration Course and uses the BDRS Managing Surveys 2012.docx Manual for all detail

<http://www.ala.org.au/tools-services/citizen-science/training-materials-2012/>

Table of Contents from BDRS Managing Surveys 2012.docx

CREATING & MANAGING SURVEYS

1. CREATING A BASIC SURVEY USING DEFAULT OPTIONS

Survey Form – Form Builder

Survey Form – Preview

Survey Form – Locations

Survey Form – Access Control

Survey Form – Final Workflow Step: Publishing

2. SIMPLE ENHANCEMENTS & EXTENSIONS TO THE DEFAULT SURVEY

Simple Field Types

Horizontal Rule

HTML – On Screen Help

Field Types Reference

3. EXPLORING SURVEY CONFIGURATION OPTIONS

OPTIONS: FORM TYPE

OPTION: DEFAULT RECORD VISIBILITY

OPTIONS: TAXONOMY

OPTION: FIELDS – THE SCOPE ATTRIBUTE

OPTION: LOCATIONS

OPTION: ACCESS CONTROL

4. DEVELOPING MORE COMPLEX SURVEYS

1. Non-Taxonomic Surveys

2. Census Methods

2. RECORDS MODERATION – THE DETAILS

5. IMPORTING RECORDS

Pre-requisites:

How To instructions:

Troubleshooting - What can go wrong?

6. REPORTING

BULK TAXONOMY

Importing species pages in bulk

BUT thinking about the whole business first: the field guide; the surveys; the taxon groups; the users

Theming & formatting the taxonomy space including species pages - demonstrating the before and after

Discuss single vs. multi BDRS vs. select from plus mobile/field guide

Creating and Managing **Taxon Group** Pages

Formatting the Field Guide

- 3 levels
 - o Field Guide - grouplisting.vm
 - o Taxon Group - taxalisting.vm
 - o Species Page - taxonview.vm
- editing the theme HTML

Tips

- naming & content
- Sorting order is created = plan ahead
- No search
- New Record now option

Plans

- Adding search
- Look at sorting
- Alternative presentation e.g. as image gallery

Creating and Managing **Species Pages**

Options

Basic taxon/species page

Enhanced & standardised species page

- Standardising - taxon.profile.template
- Presentation - taxonview.vm
- User view of species pages
 - o Formatted (default of full theme)
 - o Unformatted (no theme)

Importing Species Pages

Importing ALA species pages

Options

- Atlas short form
- Atlas full details

LSID's

- What are they?
- Role in this process
- Tips to get it right

Importing other species pages

- Spreadsheets
- Images and other media files
- Via the Atlas vs direct into BDRS

Reference

This section covers Manage Taxonomy components of the Basic Administration Course and uses the BDRS Managing Taxonomy 2012.docx Manual for all detail

<http://www.ala.org.au/tools-services/citizen-science/training-materials-2012/>

TOC from BDRS Managing Taxonomy 2012.docx

CREATING & MANAGING TAXONOMY IN THE BDRS

1: CREATING TAXONOMIC GROUPS

Instructions for creating or editing a new Taxon Group:

2: CREATING TAXONOMIC PROFILES – SPECIES PAGES

Adding a BASIC Species Page

Add RICH CONTENT to a Species Page - MANUALLY

Standardised Species Page – the Taxon Template

Creating Templated Species Pages

3: IMPORTING ALA TAXONOMY TO POPULATE THE BDRS

1: IMPORTING A SPECIES PAGE

2: IMPORTING MULTIPLE SPECIES PAGES

3: IMPACT ON SPECIES PAGE FORMATTING

PART 3: USING THE TAXON PROFILE TEMPLATE

MANAGING DATA

Menu Options

Data Preferences - on what data you will publish to other Portals

Manage Thresholds - to set when triggers occur from data entered into the Portal

Share Data - with other Portals and the Atlas of Living Australia

Download Data - from the Atlas of Living Australia, into your Portal

Download Species Pages - from the Atlas of Living Australia, into your Portal

At this time is not clear what the objectives are for this section. Currently all Themed sites access Manage Thresholds directly where needed.

Thresholds

- Conditionally triggered agents/scripts for events occurring in the BDRS such as the creation of a new sighting record.
- Require some experience to set up
- Moderation Example explore in more detail

MANAGE YOUR PORTAL

Manage Portal	Edit Preferences
	Edit Theme
	Edit Content
	Manage Taxonomy
	Manage Maps
	Manage Files
	Manage Widgets

Preferences

- Common name
- Map API
- Taxonomy
- Survey
- User Management (under development)
- Facets : unusable

Edit Theme

- Introduction to themes - Vanilla vs. Custom themes: origins of content
- Switch between themes
- Advanced editing of themes
- Accessible Content

Editing Site Content

- Accessible Content

Managing Taxonomy - covered

Managing Maps

- Useful in surveys : saw with S2S example
- Not useful: published – so don't

Managing Files

- Necessary: where used (themes, species pages)
- Fixed

REPORTING

Focus on faceting, moderation & releasing records

Discussion on reporting plans & requirements

Including list new records as image gallery

Tie back to pillars model

BDRS On-line

My Sightings

Advanced Review

[Python reporting engine? Examples?]

Atlas On-line

Regions

ALA general

Spatial portal

Import/export

Exporting

Downloading record sets

DATA MOBILISATION

Two way street

Not just records but images & species profile data & geospatial locations

Who's doing it – Reef Life Survey; Atlas of Life in the Coastal Wilderness – Orchids, seaweeds. Molluscs, etc

Mobilising current data sets – who to talk to

SELF SUPPORTING COMMUNITY

The community of users:

- Need to establish core user peer support group
- Broads skills and experience
- Single voice for funding, development, communication

Should ALA establish Forum for Q&A support? Better placed in another organisation?

COURSE REVIEW

Straw poll/Review of coverage

- Additions, changes, enhancements, issues

Quick Intro Developers course