

BASIC ADMINISTRATION

Course Notes

Objectives

At the completion of this course the Student should:

- understand the basic nature of the Atlas of Living Australia Field Data Capture BDRS tool
 - What it is
 - What it is not
 - How it can be implemented
- understand the three main components of the BDRS
 - Surveys
 - Species Profiles
 - Records management
- 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.

Courseware & course objectives

Provide complete enough coverage without over complication (level specific)

Use clear simple text and images to communicate messages

Provide useful Tips & techniques

Describe Known issues (noting currency & plans to address)

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THE BIOLOGICAL DATA RECORDING SYSTEM – WHERE IT FITS IN

Introduction

The ALA recognised the need to address the lack of software tools supporting the capturing and sharing of high quality field sourced data from amateur naturalists and other Australian citizens and set up the Citizen Science (CS) project to provide a solution.

The ALA Citizen Science software provides a Field Data Capture (FDC) capability for anyone who chooses to use it. For historical reasons it is also known as the BDRS – or Biological Data Recording System, and the terms BDRS, FDC and CS are used interchangeably within the Atlas and all of our materials.

The CS project objectives are centred upon delivering open source, freely downloadable software, complete in function and with documentation and an external support structure for use on your own or provided infrastructure.

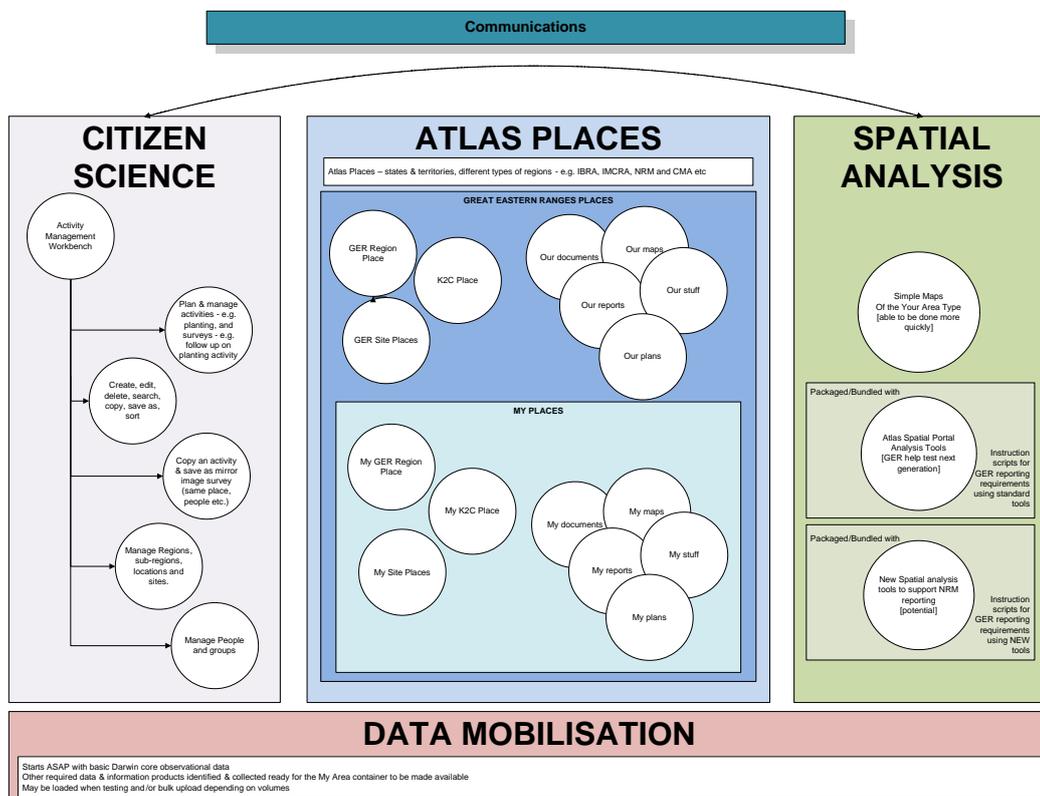
The first V1.0 release of the software is available on Google code site for download. A number of commercial and non-commercial organisations are already using the software and we expect a thriving open source community to develop around the tools.

Many of you are already implementing the software on the ALA-CSIRO provided infrastructure.

The Atlas 5 Pillars

It was clear from the outset that the BDRS needed to be complementary to other Atlas capabilities rather than competing with or duplicating functionality.

Working with the Great Eastern Ranges NRM the '5 Pillars of the Atlas' model was developed to explain the BDRS position in the complete Atlas of Living Australia tool set.



Citizen Science - Field Data Capture

The BDRS is primarily about field data capture and providing useful supporting capabilities to targeted users within a contained scope or context – for example a region, a specific species or taxonomical group, a particular area or activities of interest – for example water quality, weeding, and so on.

The Atlas - Preserving and Using Shared Data

The BDRS can not only be used to capture new biodiversity data but also to help mobilise existing data sets.

Data from each BDRS is harvested into the Atlas of Living Australia through quality control processes. This is particularly important where the data is in danger of being trapped in a small user space or even lost altogether.

Aggregating BDRS and many other data sets into a single web database provides opportunities for more sophisticated querying and analysis both on the site and off.

In the Atlas all of the data is accessible to the widest number and range of researchers and other users and available within much broader taxonomy, source, location, spatial contexts and to powerful analytical tools.

The Atlas Spatial Portal

Integrated into the Atlas the Spatial portal is a serious analytical engine providing access to hundreds of environmental layers and millions of records, including yours.

Implemented as an ongoing open source development project the Atlas spatial portal provides 'democratic' access to spatial analysis tools connected to large volumes of high quality data.

In addition many researchers are downloading the data for use in other analytical systems.

The spectrum of users, organisations & uses

Prospective users of the software range across the usual bell shaped curve spectrum from the least knowledgeable and experienced;

– “*what is it?*” –

..through more experienced amateur naturalists;

– “*this particular species is here, at this specific location, time/date, climactic conditions, environmental conditions..*” etc –

.. to professional scientists performing complex surveys on field expeditions with dedicated resources and expertise.

As you expect users and organisations come with widely varying degrees of experience, knowledge and computer skills independent of which area on the spectrum they fit.

It is impossible to meet all of the expectations of such a broad church of users. This means challenging issues to be considered during implementation including:

- What are your objectives in implementing a BDRS?
- Who are your target users?
- Do/will your objectives and theirs align?
- What do they expect and need in information and functionality terms?

- How will you present it to them in ways that will make sense while achieving your objectives?

Where the BDRS fits into the spectrum

All of the expected users of the software share one common objective - the collection of high quality data through the positive identification of species by a knowledgeable person at a specific time & date and location: the basic Darwin Core data set

what, when, where and who

Expected Users

In this context the BDRS was targeted at users on the right hand side of the curve and the software engineered to reflect this with a strong focus on taxonomy (the what), registered and experienced users (who) capturing structured data in familiar ways – using standards based surveys forms in organised field events capturing often complex information

Emerging Users

Many of the initial BDRS user groups met these expectations but it rapidly became evident that there existed a much larger community of users and organisations whose requirements leaned more towards the left hand side of the curve, with the objective of moving people towards the right hand side over time through support and education while still capturing scientifically useful data on the way.

As a result the tools and the way they are being implemented are changing – this course endeavours to cover all types.

UNDERSTANDING THE BDRS TOOL

In order to decide whether and how to implement the BDRS tool to meet your field data capture and web presence requirements you need to know both what it can do, and what it can't, what you want to be able to do, and what others are using it for.

What the BDRS isn't

It's easier to start the explanation this way.

The BDRS FDC software is **NOT**:

- A web site creation engine
- A web content management system
- A community or organisation management and reporting system
- A personal biodiversity portal
- A blogging site
- A competitor to Wikipedia, flickr, the ALA, or any other site

For example:

- Simple users can't create new pages – only advanced administrators can do this
- Users can't make comments on other people's records
- There are no simple blogging facilities – and it doesn't support RSS
- Surveys can get complicated very quickly
- The field guide model provides a basic species identification tool but cannot replace training, experience, support, more sophisticated key based approaches, or even 'show me all the birds with some red colouring'

What the BDRS is

The BDRS is on the other hand:

- A fairly sophisticated and capable field data capture tool
- A basic web site engine complementary to but not replacing other more highly targeted web applications
- A complementary capability to go with your community management tools
- A tool that requires a degree of knowledge across a number of domains – taxonomy, surveying, and web site computing – in order to be used effectively

How the BDRS is being used

The BDRS is being used:

- as a standalone field records capture tool for all kinds of flora and fauna, or just one taxa e.g. birds
- for simple sightings of species and complex surveys across species, locations and conditions
- as standalone web sites
- as complementary sighting logs to community oriented web sites
- as an atlas of species in a local area including species pages and records

- to capture species oriented data
- to capture non-taxonomic data such as on ground NRM/CMA activities like weeding, fencing and watering

The tool is pretty flexible – you can use it to do quite a broad range of things within its functional scope.

THE BDRS SOFTWARE

How you can implement the BDRS software ties in nicely with what it is being used for and leads naturally on to what it looks like and how what it looks like can help you better understand its capabilities and limitations.

Implementation options

From a software standpoint the BDRS can be implemented in 3 main ways:

- Complementary - 'side by side' (recommended)
- Single web presence
- Integrated

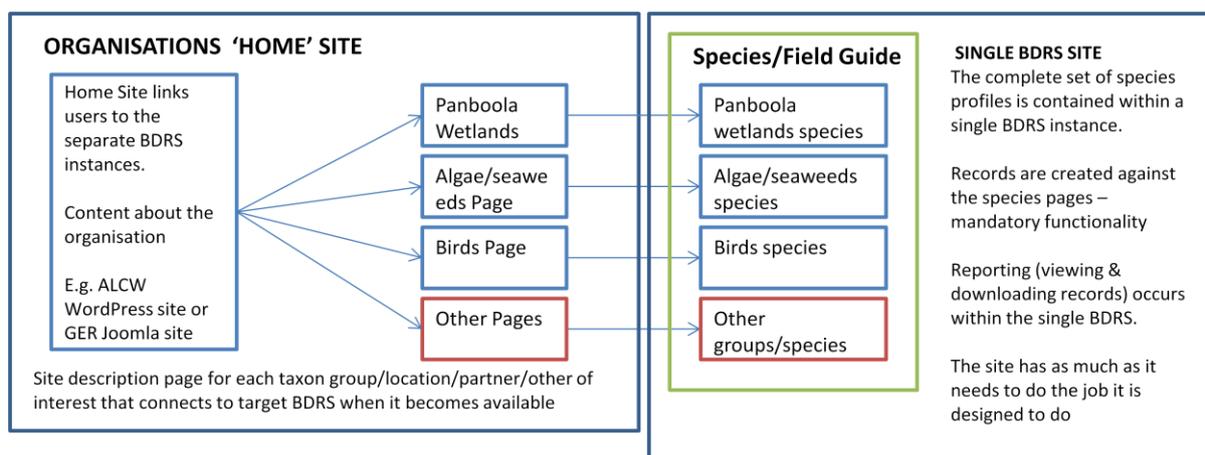
Side by Side

The recommended approach is to associate a BDRS with your current (or new) community/social media oriented site.

The example shown here is the Atlas of Life in the Coastal Wilderness.

They have two sites – there 'home' WordPress site <http://www.alcw.org.au/> and the complementary <http://alcw.ala.org.au/bdrs-core/> BDRS site providing a field guide and field data capture capability.

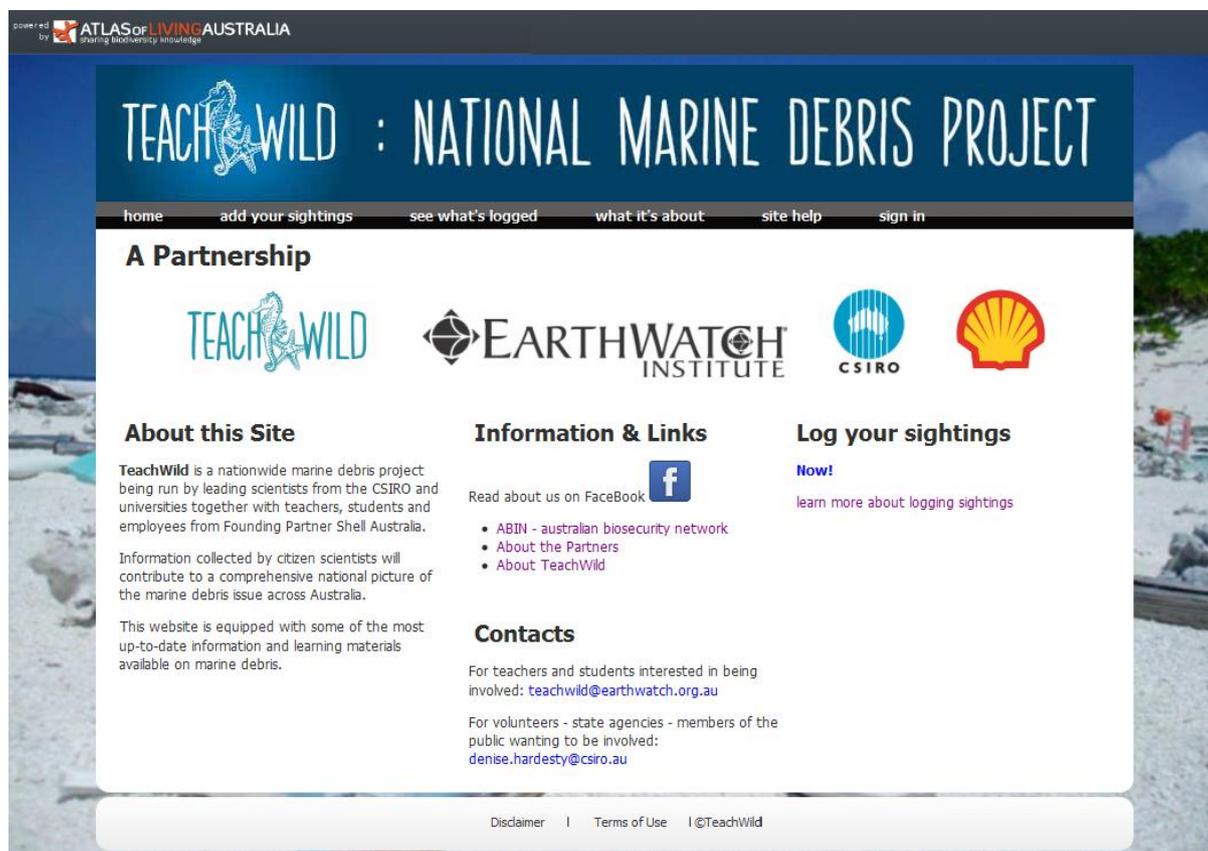
Relationship diagram:



Another example is the Kosciuszko 2 Coast region of the Great Eastern Range Initiative with <http://k2c.org.au/> and BDRS <http://k2c-reptiles.ala.org.au/>

Single Web Presence

These sites - <http://teachwild.ala.org.au/> and <http://s2s-gliders.ala.org.au/> are examples of a single site web presence.



The implications for BDRS implementation are discussed in more detail in this document and supporting materials.

Integrated

There is currently one example of an integrated site where a Drupal Web Content Management System has BDRS pages integrated seamlessly into its own – Climatewatch <http://www.climatewatch.org.au/>

THE BASIC BDRS USER INTERFACE

Key Concepts

Interface uses variations on a common theme

Access rights control menu options

The menu system shows you what you can do

EVERY BDRS needs to be themed for implementation

The ‘out of the box’ BDRS interface is very simple and it is fairly self explanatory once you get used to it and know what the less obvious functions do – like ‘Manage Taxonomy’.

There is also plenty of on screen help to let you know what something is for or what you can do and which is constantly being improved

Standard BDRS web presentation model

A new BDRS implementation uses a ‘Vanilla’ theme – the default set of menu options, pages, images, layout and colours.

The vanilla theme uses a standard web page layout as shown here:

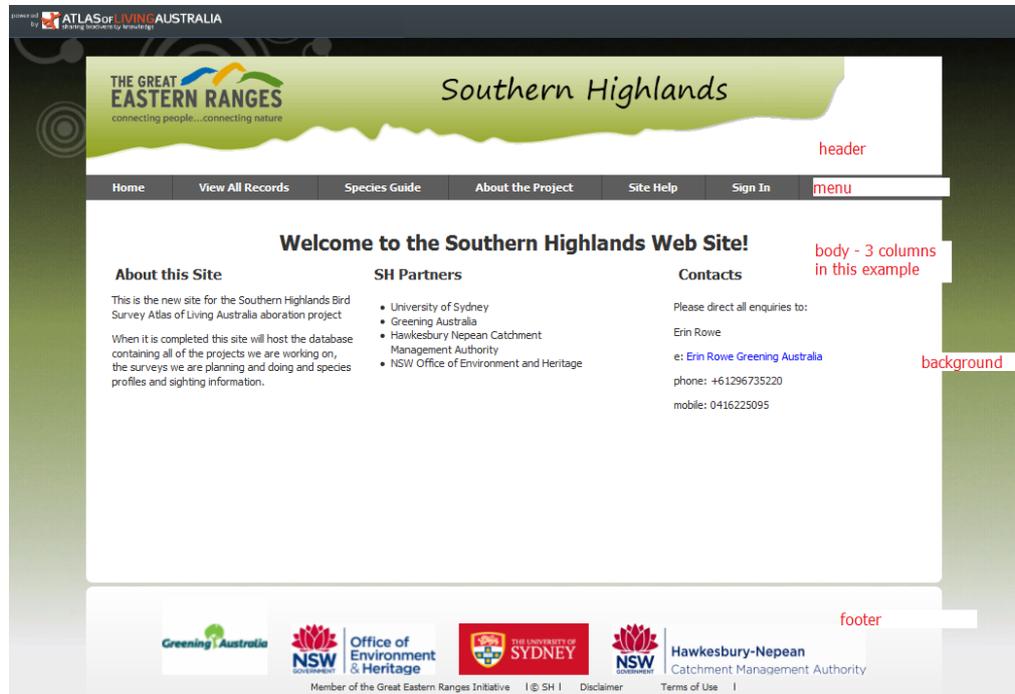
Header + Menu + Body + Footer are wrapped together over a background.



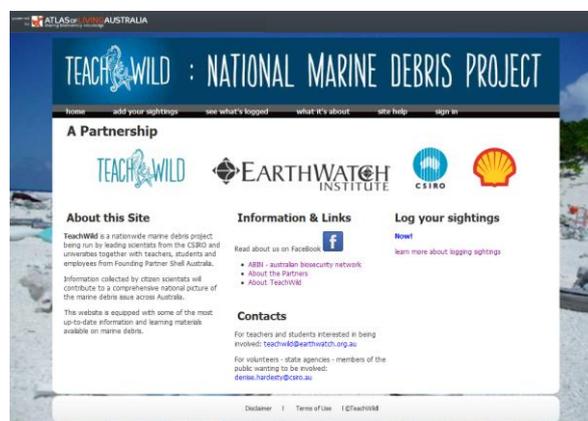
The same standard presentation model is common to all BDRS implementations.

Enhanced version of the same model

The following screenshot shows a ‘Themed’ BDRS site for the Southern Highlands Region of the Great Eastern Ranges Initiative NRM.



Compare this with the Teachwild and Vanilla BDRS home pages:



Access Controls – BDRS Content and Functionality

What an individual user can see and do is a function of being registered and signed in and whether they have been allocated an administration role.

What can each type user see?

What can each type of user do?

The 4 distinct BDRS user types or roles – 3 registered types and Anonymous – provide different levels of access to content and functionality.

The roles are:

1. Anonymous User – not registered and/or not signed in
2. Named User – known: registered and signed in
3. Supervisor – access to more functionality
4. Administrator – complete access to content and functionality

Anonymous & General Users

Most of the general (non-admin) content and functionality of the BDRS is visible to all users all of the time.

i.e. anonymous users can see most of what is on offer for them in a standard BDRS implementation.

Current versions of the BDRS show non-editable records to anonymous users.

In order to log or edit sightings or manage personal information the user has to be registered and activated.

Administrators

The *administration* functionality of the BDRS is primarily exposed to the user via the available Menu options.

i.e. the inclusion and exclusion of menu items controls what an administration user can see and do - there is little visible differentiation in the main user focused system.

explanation: some systems provide extra controls or hidden areas of text or functionality on a page depending on your access rights – the BDRS does not do this.

Known issue: anonymous users cannot see records 22/01/2012

Types of Content

Generally speaking all of the content available in the Vanilla Themed BDRS is generated by the system and an administrator requires at least basic HTML skills in order to edit the text of a number of pages and email messages.

Editing of system content is covered in the Advanced Administrator course.

Vanilla BDRS Menus

The Vanilla menu set shown here is consistent across the user types with options being visible or hidden depending on whether you are signed in or have high levels of administration access.

Anonymous	Registered Users	Registered Supervisors	Administrators
Home	Home	Home	Home
Sign In* <small>*changes to Sign Out in Top Right Hand corner once signed in</small>	Contribute ¹ <Surveys> ¹ Bulk Data ¹	Contribute ¹ <Surveys> ¹ Bulk Data ¹	Contribute ¹ <Surveys> ¹ Bulk Data ¹
Review Advanced Review	Review My Sightings ¹ Advanced Review	Review My Sightings ¹ Advanced Review	Review My Sightings ¹ Advanced Review
Field Guide	Field Guide	Field Guide	Field Guide
About	About	About	About
Help	Help	Help	Help
Menu items that only become visible to signed BDRS users ¹	Profile ¹ My Profile My Locations	Admin ¹ Admin Guide Manage People Manage Projects Profile ¹ My Profile My Locations	Admin ¹ Admin Guide Manage People Manage Projects Manage Data Manage Portal Manage Site Profile ¹ My Profile My Locations

Conclusion: ALL BDRS web sites need to be themed during their initial implementation

The Advanced Administrator course teaches you how to modify web page written content. The Develop course teaches how to create and manage a Theme for your portal.

MANAGING USERS - REGISTRATION

Key Concepts

Registration is self directed

Users can resolve forgotten password issues

All other issues require Admin support

This section of the course notes covers User Registration and simple issue resolution.

The Manage People administration functionality goes further – please refer to the document titled “Managing Users 2012.docx” for detailed instructions.

Manage People Menu Options – supervisors and administrators

Admin	Profile	About	Help
Administration Guide			
Manage People		Approve Users	
Manage Projects		Edit Users	
trator can log into the system and change it b		Edit Groups	
		Email Users	

The Registration Process

Users are required to self register with each instance of the Biological Data Recording System (BDRS)

This includes prospective Administrators.

The registration process can be based completely on prospective users following the activation workflow or can be configured to require an Administrator to approve and activate a user.

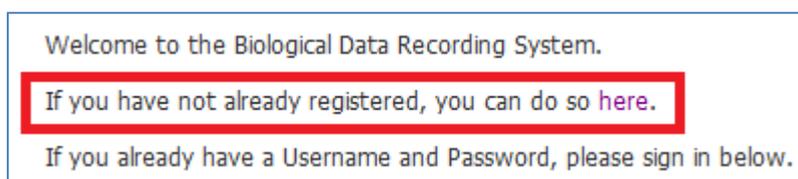
Self Registration

Complete instructions are provided here.

1. Open the provided link to the website.
2. Click on the Sign In menu item

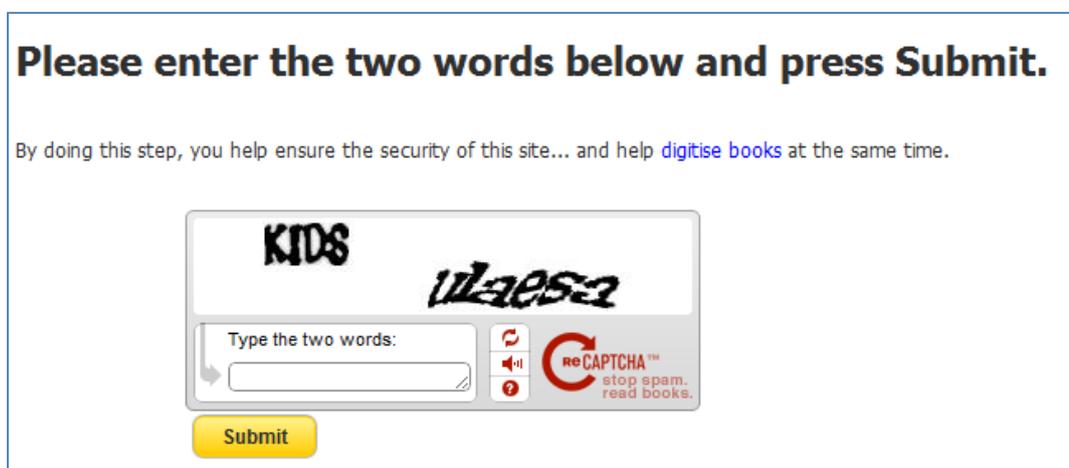


3. Notice this text



Click on the highlighted link word ‘here’

4. A new screen requests confirmation that you are human and not a web bot trying to inappropriately access this site:



Aside

reCAPTCHA [<http://www.google.com/recaptcha/learnmore>] uses text from scanned content to help digitise on line content.

5. Please fill in the requested details and click the “I Agree” check box

NOTE: You must use a real email address in order to register successfully

Register with the Southern Highlands Web Site

To start contributing your observations please enter the following details:

Please Note - if you are already a member of other K2C or GER sites please use the same details to make it easier to merge access rights later.

Account Details

Desired username*:

Email Address*:

First Name*:

Last Name*:

Choose a password*:

Repeat your password*:

This site is designed to provide survey data collection tools as well as access to historical survey data. The tools use fields and maps to capture a broad range of useful scientific information covering location, species sighted, descriptions and your log in details and so on depending on the type of survey. By ticking this box you accept that some of the sightings data you enter will be made publicly available on this site and in the Atlas of Living Australia. Data may be partially or wholly obscured for privacy reasons as necessary.

I Agree

Register

- Click the register button and you are returned to the home page showing a Green Message box telling you what to do next

- Open your email system and check for the email sent you. You may have to wait or refresh a few times to see the new email depending on how busy the internet traffic is.
- The email contains registration details and instructions on how to complete the process.

Example email content:

Hi john smith!

A request to register with the **Southern Highlands** web site was received from this email address - john.smith1234@gmail.com

To confirm your registration request please click on the following link (or copy and paste it into your browser); otherwise please delete this email.

<http://sh-birds.ala.org.au/bdrs-core/portal/10/confirmregistration.htm?key=47bf8f961aa422464ab43449b67cdb4d>

Your username is **john smith** and should be used to sign in to the site.

9. Click on the supplied link and a screen similar to this should be displayed



10. Sign in using your user name and password and you will be directed to the site home page.

Managing the Registration Process

Notes role_supervisor can do manage users

The Basic Admin course addresses the most common user issues which are usually associated with registration.

The Advanced Administration course teaches you how to change the registration process including email content.

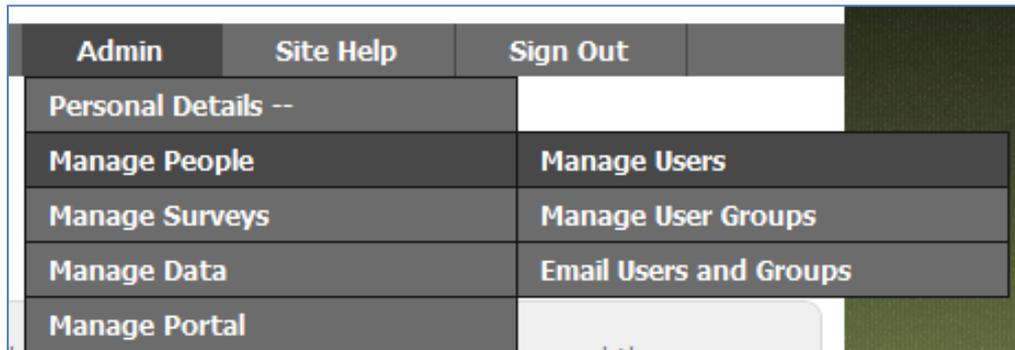
Most Common Issues

The most common registration issue is that the user has not completed activating their account for some reason.

Accessing User Management

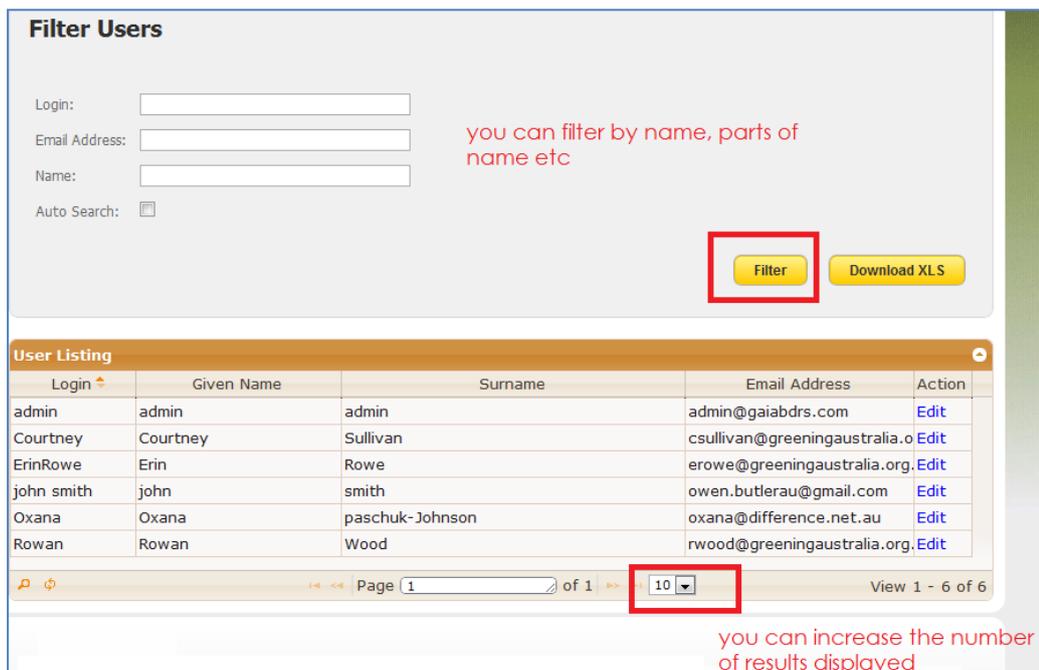
Instructions for accessing specific user records:

1. Open the menu item Admin – Manage People – Manage Users



2. Locate the user entry with problems

Type a few letters of their name into the name box and click the filter button or press enter key.



3. Select and Edit the user record

Filter Users

Login:

Email Address:

Name:

Auto Search:

you can filter by name, parts of name etc

User Listing

Login	Given Name	Surname	Email Address	Action
admin	admin	admin	admin@gaiabdrs.com	Edit
Courtney	Courtney	Sullivan	csullivan@greeningaustralia.o	Edit
ErinRowe	Erin	Rowe	erowe@greeningaustralia.org	Edit
john smith	john	smith	owen.butlerau@gmail.com	Edit
Oxana	Oxana	paschuk-Johnson	oxana@difference.net.au	Edit
Rowan	Rowan	Wood	rwood@greeningaustralia.org	Edit

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you can increase the number of results displayed

Most common issues

4. Check Active Status

Typical Reasons for a newly registered user not to be active

- user does not click on the registration link in the email;
- email goes missing, often due to a typo in the email address or into junk email folder;
- forgotten password
- forgotten user name

Edit Details of john smith

You can change your details through the form below. If you leave the password field blank it will not be changed.

Assigned Roles:
ROLE_ADMIN ROLE_SUPERVISOR ROLE_POWER_USER ROLE_USER

First name:

Last name:

E-mail address:

Active:

User Name:

New password:

Confirm new password:

Click on the **Active** checkbox – Submit to save change; Contact the user to advise issue is resolved

Note – you can correct email address, password and general name errors but the user log in name cannot be changed (john smith in the example above)

5. User has forgotten their password;

Password needs resetting for some other reason & they are unable to do it themselves for some reason.

- Edit the users profile and enter a new password in both places, click Submit;
- Contact the user to advise resolution status and any follow up actions such as changing their password to a new one.

TIP

We always recommend using a temporary password (e.g. Password) and advising the user to change to something more secure immediately on successfully entering the site

Security – passwords

You **are strongly encouraged to change the Administrator password** for your new BDRS portal from the default to something that you can remember, but that will be difficult for anyone else to work out.

If someone else manages to get into your portal as an administrator they can change pretty much anything they like, including deleting records and tampering with survey and portal configuration. For this reason it is also important to be very careful about giving too many people in your group the ADMINISTRATOR role.

If you forget your ADMINISTRATOR password you can either have it reset by someone else who has the ADMINISTRATOR role in your BDRS portal.

Note

Make sure that you have at least two ADMINISTRATOR role user name/password combinations so you can reset the others password.

We recommend you retain the ALA Admin user as a fail safe backup.

Note - Good practice should be applied to managing your passwords (especially those holding the ADMINISTRATOR role) in the BDRS, just as you would in managing your bank account password. Generally you should:

- change the Administrator password periodically
- not disclose your password to anyone else or have it written down in an easily accessible place
- choose a password that is difficult for others to work out
- include a combination of letters (capitals and lower case), numbers and non-alpha numeric characters in the password

Manual vs. Automatic User Activation

The default settings require new users to be activated by an Administrator, but it is possible to change this to automatically activate new users when they successfully submit their registration details.

There are good reasons for having both options:

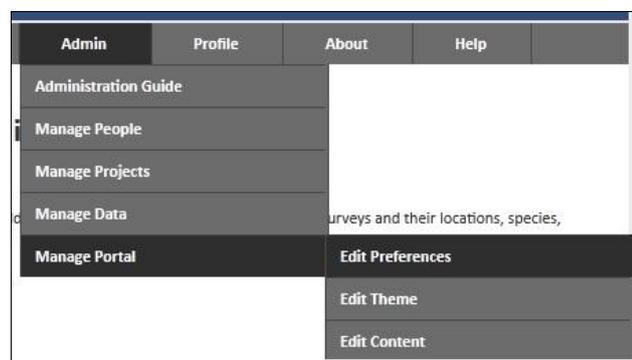
- Manual Activation allows the Administrator to control/manage access to the portal, validate users' authenticity, and simply keep close tabs on who is using the system. However it creates a potentially significant burden on the administrator and delays the new user's ability to start making sightings.
- Auto Activation allows users to register and start logging sightings immediately, thus encouraging them and building their confidence in the system. It also minimises the administrative burden on the Administrator. However, there is potential for it to be abused and create a proliferation of low quality data.

The group should make a decision as to how they want to run the registration/activation process as it applies at the whole portal level (ie. You can't have manual activation for some survey types and auto activation for registration to other survey types).

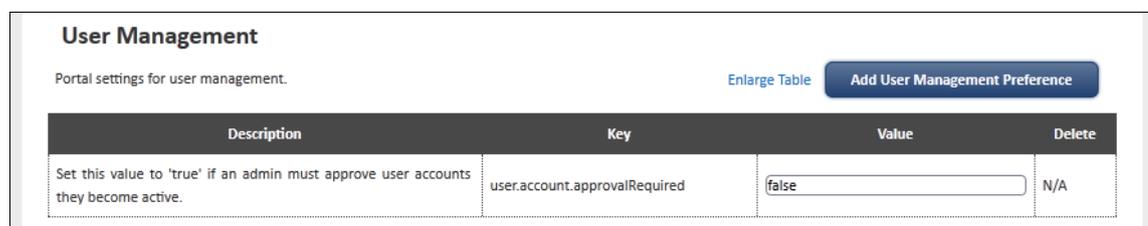
Changing the registration activation setting

Instructions for changing the registration activation setting:

1. Open the menu item Admin – Manage Portal – Edit Preferences



2. Scroll down the page to the User Management section and change the value from "False" to "True".



3. Click Save to store the change.

TAXONOMY

Key Concepts

Taxon Groups – collected together make up the field guide

Taxon Pages – descriptive pages for species of interest to your users⁴

Introduction

BDRS Taxonomy comes in two parts – the Taxonomic Page and the Taxonomy Group.

TAXONOMY PAGES

The **Taxonomy Page** is the BDRS equivalent of a **Species Profile** page in the Atlas of Living Australia and contains information about the particular species of interest including images, description, habitat, diet and so on – whatever you want to show to visitors to your site.

These species profile (aka taxon profile) pages can be developed for all levels of a taxonomic structure including sub-species, species, genus, subfamily, family etc to whatever level of detail you wish to go to and is appropriate for your audience and useful in surveys.

TAXONOMY GROUPS

The **Taxonomy Group** is a flexible grouping classification tool. You can group things by anything you like:

- For example type - lizards, snakes, skinks, waterfowl, birds of prey, etc; OR
- or within a family or kingdom: Waterfowl, Herons, Ibis etc, Birds of Prey, Shorebirds and Gulls, Pigeons and Doves, Cockatoos, Parrots and Lorikeets, Robins, Cuckoos, and so on; OR
- by habitat – wetlands, dry forest etc.

All of the taxonomic groups in a BDRS are collected together and presented on one page – the Field or Species Guide (or whatever you want to call it)

Clicking on a taxonomic group displays a list of member species – then Clicking on an individual species opens that species profile page.

You can group species at whatever level of detail you like, is appropriate for your audience and is useful in setting the context of more formal scientifically driven surveys (vs a casual “any species” sighting record with basic Darwin Core Fields).

Most BDRS sites have a field guide or species guide which shows this first level of grouping that provide users with the opportunity to browse your content within the grouping or association framework and which shape and guide their understanding of what your particular projects are all about.

The relationship between Taxonomy and Surveys

Key Concept

Taxonomic Surveys require Taxon Pages as species references

Recording species in the BDRS is dependent upon them having already been entered or loaded into the BDRS system

Referring back to the introduction all of the expected users of the software share one common objective - the collection of **high quality data** through the **positive identification of species** by a knowledgeable person at a specific time & date and location: the basic Darwin Core data set

what, when, where and who

What this means to you:

The BDRS was engineered with Taxonomy and positive species identification as the main drivers - 'this is here' preferred over 'what is this?'

Earlier software releases required the development of a taxonomical structure of groups and species pages in order to work.

During implementation we can overcome the species focus by including **placeholder** or 'fake' species such as

- What is this?
- Not Listed
- Uncertain

and so on and then applying moderation controls to the processing of these types of records to try and positively identify the species being queried.

Could also use a non-taxonomic survey and not assign records directly to species – have a user assignment with a later confirmed moderation assignment to the 'real' species for harvesting.

Said another way the BDRS is not a tool intuitively designed for capturing a bunch of images with no idea what they are and supporting a discussion about them leading to a potential positive identification in the way flickr and other sites can be used.

This is not to say it can't be done, just that there are limited ways in which to do it and they may not suit your requirements.

Working examples further the discussion and help you decide.

1. BDRS TAXONOMY

There are two main methods for creating and managing taxonomic content in the Biological Data Recording System.

The simplest is to bulk **import** species pages from the Atlas of Living Australia (Atlas) into previously created Taxon Groups.

Note *There are future plans for supporting importation from other sources including spreadsheets*

Currently we recommend importing species profiles directly into the Atlas from which you can access and download into your BDRS as required.

The more complex method is to **create** the species profiles and their content by hand and associate them with previously created Taxon Groups.

This course provides you with a high level overview to help understand how the BDRS works – the Advanced Administration Course goes into these methods in much more detail.

The Field Guide

Field Guides are produced automatically when a BDRS contains Taxon groups and associated species pages.

In addition to their role in surveys taxon groups, species pages and field guides are key parts of your BDRS web site as they show potential users what species you are interested in (birds, reptiles, plants – everything!) and help them to discover species of personal interest as they browse the guide.

The Field Guide can be themed.

Unthemed Field Guide

Taxon Groups have images otherwise there would only be text names.

Themed Field Guide

Heavily themed page acting as

- Home page for Reptile site
- field guide for Reptiles & Frogs
- portal providing access to other K2C sites with the same kind of structure.

Taxonomy – 2 levels of Navigation

When you click on a Taxon Group link image on a Field Guide it opens a screen displaying the first 50 species in that group.

Scientific Name ↑	Common Name		
Acrیتoscincus duperreyi	Eastern Three-lined Skink		Record Now
Acrیتoscincus platynota	Red-throated Skink		Record Now
Carlia tetradactyla	Southern Rainbow-skink		Record Now

Clicking Record now EITHER opens a default survey for this species OR, where there are more surveys that can be used, displays this screen

Choose Project

We have found that there is more than one project that you may log a sighting for your selected species. Please choose the project for which you would like to contribute a sighting.

Survey	Record Now
Casual Reptile & Frog Sighting	Record Now
Multi-species at site survey	Record Now
simple survey	Record Now

Discussion

Performing this sequence displays some key characteristics and limitations of BDRS taxonomy

- it only has two levels: field guide and taxon group
- the presentation is a list which is broken into pages with next | previous buttons, and
- there is no Search Taxonomy function and hence no way of getting directly to a species of interest.

Presentation

Currently while we can theme the Field Guide there is no easy way to sort the order of the Taxon Groups on the page.

Also we can't delete Taxon Groups or directly exclude them from the field guide. Instead we hide them by renaming them to "Life"

Since renaming the group to Life keeps the collection of species this means they will still be available in Surveys which use the All Species taxonomy option.

From the next version of the BDRS we can theme the taxon group screen. The default Atlas Vanilla theme will arrange the species more like the K2C Reptiles Field Guide as a page of images with name text below.

Number of levels

At this time there are no plans to increase the number of levels a taxonomic navigation hierarchy can go above the 2 available.

We should however be able use the ability to theme Field Guides and Taxon Group pages to mimic more levels through some basic development. This has not been tested yet.

Search

A search function will be included at the field guide and taxon group levels.

Taxon Group Membership

Currently a species page can only belong to one Taxon Group.

A change request has been made to support multiple groups.

For example a bird may be a marine bird, a wading bird, a threatened species and so on.

2. BDRS SPECIES PAGES

Key Concepts

Taxon Pages – descriptive pages for species of interest to your users

Presentation is important - most people like eye candy

Content is important – empty screens look bad

Create & Maintain needs to be made easy

No species no taxonomic surveys

The two ways of creating species pages

- Manually
- Import from Atlas or other source

Adding a Basic taxon/species page

Adding content to enhance species page

User view of species pages

- Unformatted (no theme)
- Formatted

Standardised Species Pages – the `taxon.profile.template`

Importing Species Pages

Importing ALA species pages

Atlas short form

Atlas full details

LSID's

- What are they?
- role in this process
- Other options (requires confirmation vs web services)
- Tips to get it right

Revisit User view of species pages

- Unformatted (no theme)
- Formatted

Importing other species pages

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

SURVEYS

Key Concepts

There is a workflow

Surveys can be simple and flexible

Taxonomic AND non-taxonomic surveys/projects/work-activities

Need to focus strongly on user experience & requirements

Need to develop an holistic view across site : taxonomy : survey

This Section of Course Covers:

Part 1 – creating a basic survey using default options

Part 2 – Simple Enhancements & Extensions to the default survey

Part 3 Configuration Options – form type; default record visibility; taxonomy; personal locations & others; access control; Basic moderation

Detail:

Live Demonstration

Please do it yourself – caveat: can't delete most things yet but can reuse!

<http://bdrs-uat.ala.org.au/bdrs-core/portal/19/home.htm>

Creating a basic survey using default options

Workflow

Project: Survey - Name

- Basics explained
- Form type - default
- Recommended : simple surveys until do next course

Taxonomy

- Options
- Implications

Form

- Default Darwin Core fields
 - o Core field types: quick reference guide
- Scope: Survey vs record – don't use others
- Data naming conventions (standards)
- Drag to sort rows
- Preview

Locations

- Create
- Restrict
- Impact on survey form
- Use across surveys

Access controls

- Options
- Implications

Extending basic surveys

Formatting a survey

Adding on screen Help text

Moderated

- Set up by advanced administrator
- Your role in the general moderation process

Non-Taxonomic

- Defined – use case examples
- Census Methods
 - o Basic concepts
 - o Advanced Admin course

Importing records

Bulk Loading – whether to make it visible or not

Alignment with surveys

Plans

Standard library – import/export as json file

Moderation enhancements

Reference Material

This section uses the BDRS Managing Surveys 2012.docx Manual for contact and detail.

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

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Survey Form – Preview

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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

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IMPORTING RECORDS

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Alignment with surveys

REPORTING

BDRS On-line

My Sightings

Advanced Review

Atlas On-line

Regions

ALA general

Spatial portal

 Direct

 Import/export

Exporting

 Downloading record sets

 Current limitations & plans

DATA MOBILISATION

Mobilising current data sets

- Records
- Species profiles
- Other stuff e.g. maps of specific areas of interest e.g. Biodiversity Regions, GER, K2C etc

THE FUTURE

The future – for the Atlas; for the BDRS; for the community of users

COURSE REVIEW

Review of coverage

- Additions, changes, enhancements, issues

Straw poll

Advanced course