Scratchpad Training Course - Advanced

This one-day course is intended to help moderately experienced Scratchpad owners develop their site building skills. We assume that you have attended the basic training course and/or know how to add various data [pages, images, bibliographic citations, locations & specimens] and how to deal with the basic administration of your Scratchpad. The focus of this course lies on the import of specimen data, the creation of custom content types and views, management of groups, and the publication of Scratchpad data in a journal. When you have finished with the manual you can work with your own Scratchpad. Please bring example data you would like to import on a USB flash drive or bring a concept of a content type and/or view you would like to create.
Our goal is to provide a taste of what the sites can do and help you to set up your Scratchpad according to your needs. The advanced course will cover:

The chapters in square brackets have been covered in the basic training course. However, we need a classification and bibliography in order to create the custom content type.

Twenty training sites have been established at:

http://training[1-20].taxon.name

You will be issued with a number that corresponds to your training site and should log in with the following credentials:

Username: username
Password: password

Training files can be downloaded from http://scratchpads.eu/scratchpad-training-files. Either keep this page open in a separate tab in your browser or download and unzip the 'Advanced_Training_Files.zip' file, which contains all the files you are going to need for this course.

Browser: Scratchpads run best in Mozilla **Firefox**. To ensure that we all see the same things, please use Firefox. If you don't have it on your computer install Portable Firefox, which can be downloaded from http://portableapps.com/apps/internet/firefox_portable.

The **aim of this course** will be to create a taxonomic website for the fly family Carnidae, specifically a species page for the bird parasite *Carnus hemapterus*. You can see what your training site might look like at the end of the basic and advanced course at http://carnidae.myspecies.info.

Import data

Generally, all imported data need to be in a spreadsheet format, with a column for each field and a row for each record. A header row with the correct field names as they appear in the Scratchpad, facilitates the import. The spreadsheet needs to be saved as a comma- or tab-delimited file. Exceptions are bibliographic citations, which are imported in special bibliographic formats, and images, which are uploaded as image files, e.g. jpg. The taxonomy import is also special, see below.

[Taxonomy (T)]

Import a classification

1. Click on 'Taxonomy' in the Content menu and click on 'Add vocabulary' to create a new vocabulary.
2. Enter the vocabulary name (Carnidae) in the Vocabulary Name field. Click 'Save'.
3. Click the 'Import classification' tab to reveal the options for importing a classification. If you have more than one vocabulary, you need to select the new vocabulary you just created (Carnidae) under the 'Destination Classification' pull down menu. Note that you will not need to select a taxonomy if there is only one (e.g. the Carnidae one that you have just added).
4. Click the 'Import from EOL' link and enter "Carnidae" in the text field.
5. Click search. The name "Carnidae" appears in several possible classifications. Choose the first one (Species 2000), and click 'Import'.
6. When the import is complete, renew your browser window in order so see the new classification block.

Open the "Carnus hemapterus" species page, keep this page open and open a new tab in your browser window to continue with the manual (on a PC right click on the logo and choose 'Open Link in New Tab'). When you have added new data you can switch back to the species page and renew the window (Ctrl+R) to view the changes.

[Literature]

Import a bibliography

1. We will import a bibliography that has been exported from Endnote (Exporting from Endnote X is as simple as selecting "Export" from the "File" menu, and saving the Library in XML format).
2. To enable auto-tagging of the imported bibliography go to the advanced administration page, click on 'Autotag settings' in the 'site configuration' section, select the 'Biblio' content type under 'Default for "Autotag on save"', and save the configuration.
3. Download the "Biblio_Import.xml" file from the example data (see http://scratchpads.eu/scratchpad-training-files), which is in Endnote 8+ XML format.
4. Click the "Import a Bibliography from your reference manager" icon under "Biblio" in the "Content" menu in the left sidebar. This will bring up a form with a number of options. Select the XML file you just downloaded; select Endnote 8+ XML from the pull down menu; then click "Import". Wait while the records are imported.
5. Click "Biblio" in the Content menu and you should see all your imported records.

Locations and specimens

Import of location and specimen records

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 to the same location.

Location and specimen data can be imported using a comma or tab separated file created within an Excel spreadsheet. You will need to import first the file with the location data and then the file with the specimen data. The files need to contain at least the required fields. To check which fields are required add a location/specimen and find the fields marked with a red asterisk. In addition to these fields you should add a 'Taxonomic name' for specimens. You may also choose to add additional data as you see fit. It will make the import easier if you use the correct field names in the header. Subsequent rows should contain the records. Make sure that for the fields which appear as drop down menus when you add a location/specimen, you enter one of these options in your matrix because the import will not work with terms that are not in this list. The same holds for the 'Taxonomic name': you need to enter a term that is in your vocabulary.

1. We have prepared some example locations and specimens for this course, which can be downloaded from http://scratchpads.eu/scratchpad-training-files (Location_Import.txt, Specimen_Import.txt).
2. Click the 'Import from CSV file' icon next to Location in the 'Content' menu.
3. Upload the Location_Import.txt file and click 'Next'.
4. Follow the instructions that appear on screen, uploading the file, choosing 'Tab separated' values, matching the column headings and parsing the data into the Scratchpad database.
5. Next import the specimen file into the specimen content type. This is a very quick way to bulk import records.

Manage data

Custom content types and views

Create a new content type and view

Creating a content type allows you to create content in which the data are entered and saved in specific fields. If you already have data available, which are stored in a table or a database, you can create a custom content type with exactly the same fields and import the data into the Scratchpad. To show the data to the user in the best possible way you can then improve the view for this content type.

Example 1: You are going to create a 'Citation' content type and a view for presenting these citations. For this exercise you need to have a classification and a bibliography on your Scratchpad.

1. Go to the advanced administration page by going to the URL ".../admin"
   or clicking on 'Administer' and then 'Advanced' in the user menu. In the 'Content Management' section click on 'Content types' and then on the 'Add content type' tab.
2. In the 'Identification' section enter the name (Citation), type (citation) and description (Keywords and page number linking taxa with references) of the new content type.
3. In the 'Vocabularies' section select the classification you want to be associated with the citations.
4. In the 'Autotag settings' section you can choose whether content of this type should be automatically tagged or not.

The default is on autotagging, which means that if a term of the associated vocabulary is present in the title or one of the other fields, the citation will be automatically tagged with this term. Check out the 'Autotag settings' on the advanced administration page for more options.

5. In the 'Submission form' section enter the title field label (Taxon name as cited). You do not need a body field, so delete the word "body" in 'Body field label'.
6. If you are working with organic groups and want to be able to use this content type within a group you need to change selection in the 'Organic groups' section to "Standard group post" or one of the other choices.
7. Click on 'Save content type'.
8. In the list of content types scroll down to your new content type and click on 'manage fields'.

If you wanted your fields to be sorted into groups, you would have to enter text in the two fields for 'New group' and save. Groups are useful if you have many fields. In a detailed description all head characters could for example belong to the group "Head". After adding groups first you can start adding fields, but you can also add the groups at a later stage and drag and drop the fields into the groups. However, for the Citation content type we don't need groups.

9. Go to the 'Add' section and 'New field'. Enter the label (Page) and field name (page) and select the field type "Text" and form element "Text field". Click on 'Save'.

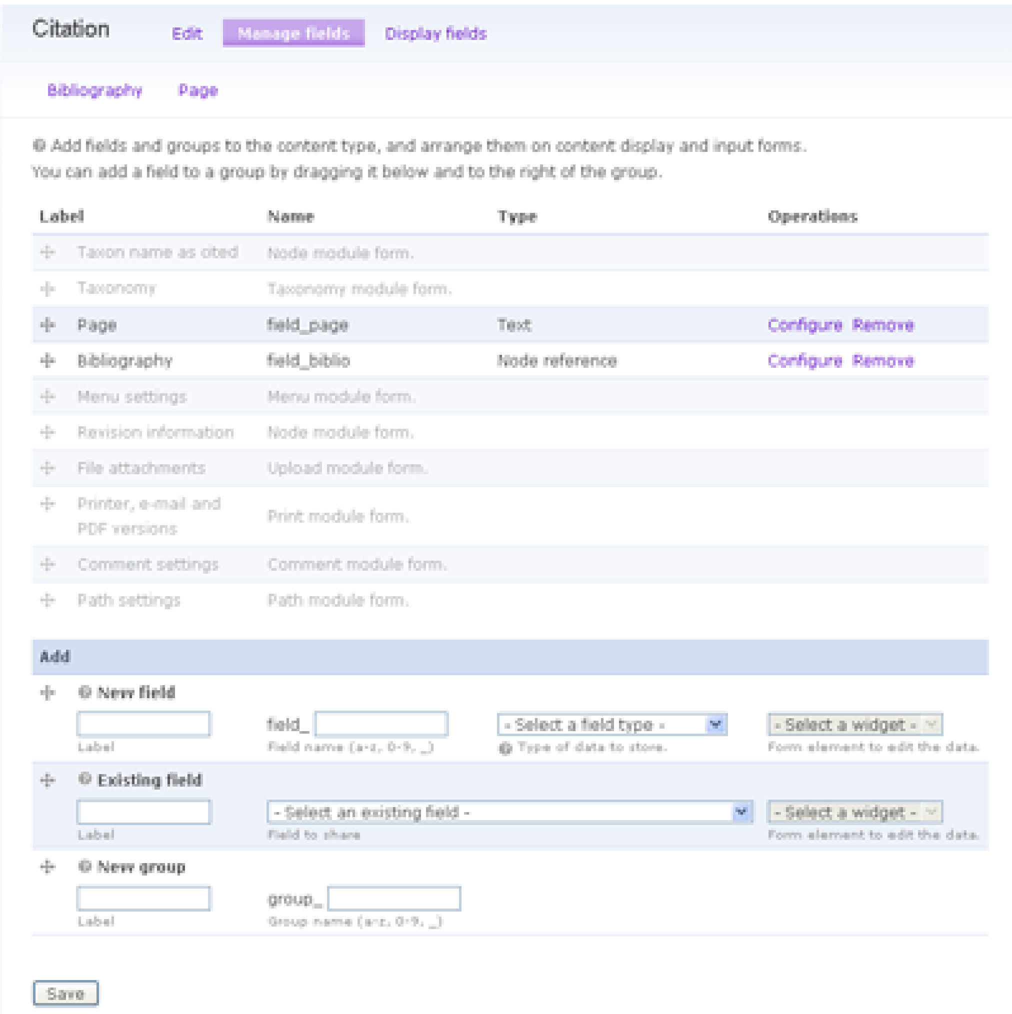
10. Enter the help text (First page number where taxon is cited). Adding a 'Help text' is useful if you want to advise users on a certain format, for example for type information, or just to explain what kind of information belongs into this field.

Under 'Text processing' you can choose 'Plain text' if you don't need any special formats like italics. 'Filtered text' allows formating of the text but the field takes more space on the page.

11. Click on 'Save field settings'.
12. Add another 'New field' with the label (Bibliography) and field name (biblio) and select the field type "Node reference" and form element "Select list". Save.

For this field we chose "Node reference" instead of "Text" because we don't want to enter a bibliographic citation, but instead link to an existing biblio node. Instead of creating a new field, we could also choose the 'Existing field' "Node reference: field_publication_biblio" and adapt it to our needs.

We chose the form element "Select list", because in the case of bibliographic citations it allows us to find references by typing the first letters of the author. "Autocomplete text field" only finds references by typing in the first letters of a work in the title.

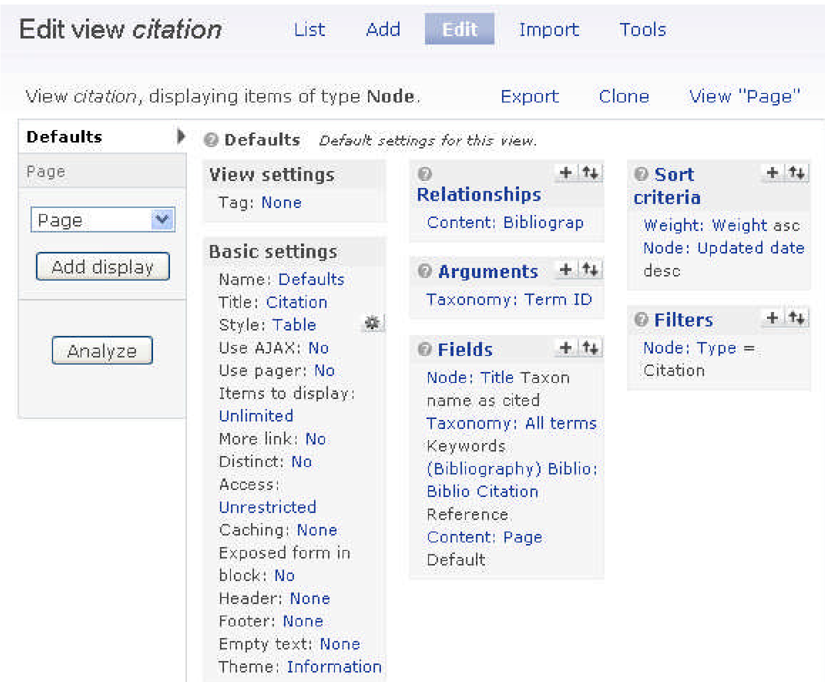


13. In the 'Global settings' section choose the content type 'Biblio' and under 'Advanced' choose "biblio-nodes" as 'View used to select the nodes'. Save.

14. Now you can either add another text field called Keywords, or you make a new taxonomy called Citation Keywords, for which you select only the content type ‘Citation’ and only the settings ‘Tags’ and ‘Multiple select’ (open a new browser tab to add the new taxonomy to keep the current page open and close the tab when you are done). If you do the latter, you don't need to add another field to the citation content type because you will be able to choose keywords when adding a citation automatically.
15. Under 'Manage fields' you can sort the fields by drag and drop.
16. Under the 'Display fields' tab, you can choose where the label should go. Choosing 'inline' will save space and allow for more fields to be visible on the screen without scrolling. Save.
17. As soon as a new content type is saved it is added to the ‘Content’ menu. Click on the “Add a Citation node” icon and enter two or three test citations (tagged to 'Carnus hemapterus').

The ‘Citation’ content type is now finished and a widget was automatically added to the taxon pages. Check a taxon page which actually has citation tagged to it (Carnus hemapterus), and if necessary drag the new widget into the active section. We are now going to improve the view of the widget and afterwards we will make a new page to enable a better search for citations. For learning purposes we will created a completely new view, though we could modify the one which has been automatically generated.

1. Go to 'Administer' > 'Views' and click on 'Add'.
2. Enter the name (Citation2) and description (Table view of citations) for the view.
3. The view type is 'Node'.
4. Click on 'Next'.



5. Under the Basic settings' click on 'Title: None', enter the the title (Citation2) in the box that opens below and update. *You will get a warning message for the Life preview, but you can ignore this for now. You will also notice that the title line is now light yellow, which means that you changes are not saved, yet. If you leave the views page as long as parts are marked in light yellow, these changes will be lost. Click the 'Save' button to avoid losing changes.*
6. Under 'Filters' click on the plus icon to add a new filter. In the box that opens below choose 'Node' in the drop down menu under 'Groups'. Scroll down, check 'Node: Type' and click on 'Add'. Select the ‘Citation’ node type and click on 'Update'. Click on 'Save'. *This means that only content from the ‘Citation’ content type is shown in this view. Click on the question mark icons for explanations of the respective view parts.*

7. Another useful filter to add is "Node: Published or admin", which makes sure that users will only view nodes they are allowed to see, that is those which are either published or which they have the right to view.
8. Under 'Fields' click on the plus icon to add a field. In the box that opens below choose 'Node' in the drop down menu. Scroll down, check 'Node: Title' and click on 'Add'. Enter "Taxon name as cited" as label and check 'Link this field to its node'. Update. Add another field for the citation keywords. If you added the keywords as a simple field, it can be found under 'Groups' > 'Content'. If you added a new taxonomy you will find it under 'Groups' > 'Taxonomy', click on 'Taxonomy: All terms', click 'Add' and change the label to "Keywords". Select 'Limit terms by vocabulary' and than the 'Citation keywords' and click on 'Update'. Save.

Now we want to add the biblio field which we need to link bibliographic citations with our citation content type. Because 'Bibliography' is a different content type from 'Citations' we need to first establish a relationship between these content types.

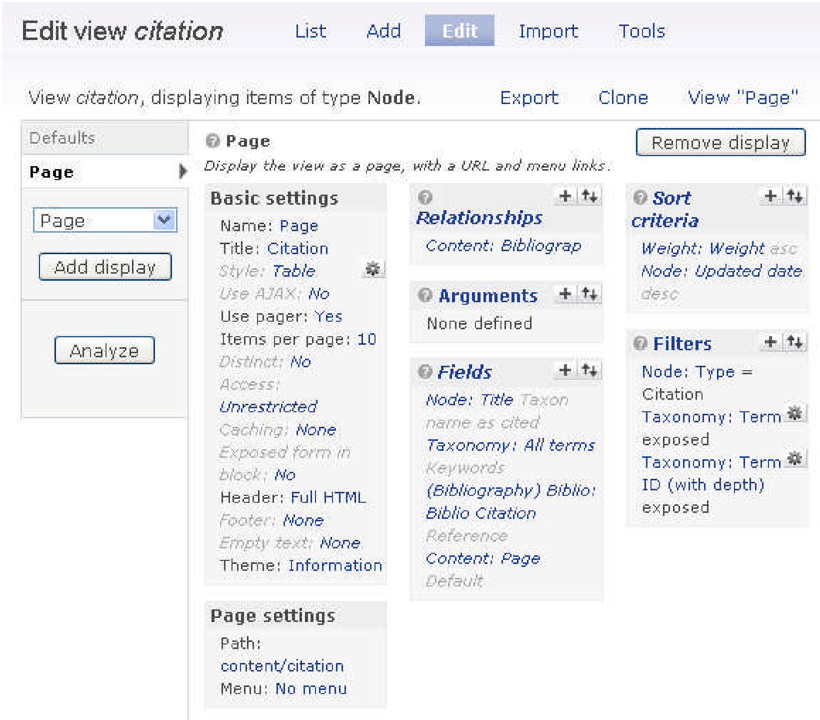
9. Under 'Relationships' click on the plus icon, select "Content: Bibliography (field_biblio)" and 'Add'. Click on 'Update' and save.
10. Now add a new field "Biblio: Biblio Citation" and choose the relationship "Bibliography". Add the label (Reference), select "Trim this field to a maximum length", enter a maximum length of "300" and select "Add an ellipsis". Choose your preferred style, e.g. CSE, and save. *Note: Currently 'Biblio Citation' is not showing correctly and we are waiting for the Drupal community to fix this. So instead add the biblio fields "Authors" and "Year of Publication" and add the field "Node: Title" with the relationship " Bibliography" and a link to the node.*
11. Next add the page field (Content: Page) and save.
12. We want to create a taxon page view (panel view), so under 'Arguments' click on the plus icon to add a new argument. In the box that opens below choose 'Taxonomy' in the drop down menu, check 'Taxonomy: Term ID' and click on 'Add'. Under 'Action to take if argument is not present select 'Hide view / Page not found'. Click on 'Update' and 'Save'. You can also sort the panel by adding a sort criterion, for example 'Weight: Weight'.
13. Under 'Basic settings' click on Style: 'Unformatted' and change the view style to table. Click on 'Update'. Then, click on 'Items to display' and set the number of items to display to "0", which means 'unlimited'. Otherwise you will only see the set number of items without knowing that there may be more items. Save.

To view you new 'Citation2' widget you need to go back to a taxon page which actually has citation tagged to it (Carnus hemapterus).

Now are going to add a separate page.

14. Click on the 'Add display' button, with 'Page' chosen in the drop down box. Under 'Page settings' click on Path: 'None', enter the URL (content/citation2) and update.
15. Under 'Basic settings' click on 'Use pager', click on the 'Override' button to be able to have a different setting for this page than for the default we did earlier, select 'Full pager' and update. *The pager enables you to click through several pages of citations instead of having one long list.* Set the 'Items per page' to "10" and click the 'Override' button if necessary (it is not necessary if the button reads 'Use default'). Update and save.

16. Make sure you are still on the 'Page' display. *Each time you save you go back to the Default settings and need to click on the 'Page' setting again.* We need to remove the argument in order to show citations for all taxa on this page. Click on your argument, then on the 'Override' button, click on 'Remove' and save.
17. Make sure you are on the 'Page' display. If you want to check your new view click on 'View "Page"' in the upper right corner. You can go back to editing the view by clicking on the light grey '[Edit]' link which appears below the view title when you hover over the page (not the sidebar). From now on you will automatically view the "page" you produce when you click on 'Save'.
18. We want the user to search for taxon names and/or citation keywords. To do this we need to add two filters to our page view. Under ‘Filters’ click on the plus icon, choose 'Taxonomy' > 'Taxonomy: Term' (the term ID one), select the Carnidae classification and update. Click on the 'Override' button and on the ‘Expose’ button so that users can see the filter. Select ‘Unlock operator’, enter the label “Search for: Taxonomic name”, uncheck ‘Force single’ and update. Save. Add another filter for the citation keywords and save.



19. Try out your new view. You can search for multiple terms when you separate terms with a comma.

Example 2: Create a map view. For this exercise you need to have a few locations and specimens on your Scratchpad.

1. Go to 'Administer' > 'Views' and click on 'Add'.
2. Enter the name (Map1) and description (Distribution map) for the view.
3. The view type is 'Node'.
4. Click on 'Next'.
5. Under 'Filters' click on the plus icon to add a new filter. In the box that opens below choose 'Node' in the drop down menu under 'Groups'. Scroll down, check 'Node: Type' and click on 'Add'. Select the ‘Specimen (DwC 1.2.1)’ node type and click on 'Update'. Click on 'Save'.

This means that only content from the ‘specimen' content type is shown in this view. However, to show a distribution map we need to show data from both the specimen and the location content type. Therefore we need to establish a relationship between these content types.

6. Under ‘Relationships’ click on the plus icon, select “Darwincore - Specimen: Darwincore location node” and ‘Add’. Enter the label (Darwincore location node), check " Require this relationship" and update.
7. Under 'Fields' click on the plus icon to add a field. In the box that opens below choose 'Node' in the drop down menu under 'Groups'. Scroll down, check 'Node: Title' and click on 'Add'. Enter “Title” as label and check 'Link this field to its node'. 'Update'. Add the following other fields: "Darwincore - Specimen: Taxonomic name", "Darwincore - Specimen: Sex", "Location: Latitude" and "Location: Longitude".
8. Under 'Basic settings' click on Style: 'Unformatted' and change the view style to 'Gmap' and set the ‘Items per page’ to unlimited (number of items to display is “0”). Click on 'Update' after each and 'Save'.
9. Click on the 'Add display' button, with 'Page' chosen in the drop down box. Under ‘Page settings’ click on Path: 'None', enter the URL (map1) and update.
10. Save. If you want to check your new view go back to the 'Page' display and click on 'View "Page"' in the upper right corner. You can go back to editing the view by clicking on the light grey '[Edit]' link which appears below the view title when you hover over the page (not the sidebar). From now on you will automatically view the "page" you produce when you click on 'Save'.
11. We want the user to search for taxon names. To do this we need to add a filter to our page view. Under ‘Filters’ click on the plus icon, choose 'Taxonomy' > 'Taxonomy: Term' (the ID one) and select the taxonomic vocabulary (*choose one which has specimens connected with it*). Click on the 'Override' button and on the ‘Expose’ button so that users can see the filter. Select ‘Unlock operator’, enter the label “Search for: Taxonomic name”, uncheck ‘Force single’ and update. Save.
12. Try out your new view. You can search for multiple terms when you separate terms with a comma. You can see the distribution for the taxa you select, but you can only see one node (pin) for each locality. Therefore if you select multiple taxa, you will not be able to verify whether one locality has more species than the one showing when you click on the pin. (*We hope to improve this soon*)
13. If you want to restrict your map to a certain project, say European species, you can add another filter. Choose "(Darwincore location node) Darwincore - Location: Continent/BodyOfWater ", select 'Continent/BodyOfWater', select "Darwincore location node" as relationship, enter "Europe" as value and update. To make the view work properly you will need to have at least one locality with "Europe" in the continent field.
14. If you want to adapt the view of your map, you can change the color and size of the pins if you click on the cog icon next to the GMap style (under 'Marker / fallback marker to use:').

For other adaptations you can change the GMap module (on the advanced administration page click on 'GMap' in the site configuration section). However, be aware that this will change all the maps on your site.

Groups
Create private areas to cooperate on a specific project

Let's assume you want to prepare data for your 'PaperX' online, but you don't want anybody to see these data, yet, except for yourself and maybe some co-authors. However, you plan to make all the data visible to everyone as soon as the paper is published. The best way to do this is by using an organic group.
Organic 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 editor for a group and therefore edit group content created by other group members. Content generated within a group can be publicly visible or hidden and the whole group can be hidden as well.
The creator of a group is usually responsible for managing the group and its users, but he/she can also give this responsibility to another user.

1. Hover with the mouse over ‘Group’ in the ‘Content’ menu and click on the 'Add a group node' icon which appears to the right.
2. Enter the Group Name and Description. The Group Name should be short as it will show up in the web addresses of all content you produce within this group.
3. We don't mind people knowing about this group, so 'List in groups directory', can be checked. However, we don't want anybody except coauthors in the group, so we don't want the group to appear in the registration form, and keep the 'Registration form' field unchecked. *If you select this field, you will get an email informing you of applications and asking you to approve or disapprove a new member*. Choose the membership request you prefer. For our example select 'Invite only'. Save the group.
4. You are now on the group's main page. *Notice the additional links in the Content menu.* Click on the 'Edit' tab to further configure your group if needed.

Your group is now establish under the alias: …/content/groupname and all content you create within this group will have the alias …/groupname/contenttitle. It is useful to activate the Group detail block (through the administration pages), because it enables you to add content to the group from all nodes that belong to the group and to add new members to your group by clicking on ‘1 member’ (or 2, 3, ... members) in the group block. However, you can also administer group membership via the Content menu. When you are on the main group page links to 'Members' and 'My Membership' will appear under the 'Group' menu item.

5. Now add a few examples of content to your group. When you are on the main group page every content you add using the content menu will automatically be added to the group. Otherwise you can add content to a group by selecting the group under the 'Access' tab in the 'Advanced options' section.

By default, content added to a group will only be visible to group members not to other users. If you want group content to be public you can select 'Public' (as well as the group) under the 'Access' tab of the advanced options for the respective node. If you decide at some point to make all the content in a group public, you can delete the group. This will not delete the content in the group but instead make it public. This option can be useful if you use a group to prepare content for a paper and want to make the content public after the paper has been published.

6. Log out of the Scratchpad to verify that the content you added to this group is not showing. You might have to reload the page for this.

We are now assuming that your paper was published and that you want all the data in your group to be visible to everyone.

7. Log back in and you will see the group content again. Go back to your group for example via the 'Group' link in the Content menu and clicking on the 'My groups' tab. Edit the group and click on the 'Delete' button. You will be asked what you want to do with the group's posts. Select 'Do nothing' and click on the 'Delete group' button. Your group is now deleted and all the content which belonged to this group is publicly available on your site.

Help and support

Help and tips for working with Scratchpads can be found in a series of FAQs at http://scratchpads.eu/faqs and screencasts at http://scratchpads.eu/screencasts. The screencasts have not yet been updated to the current Drupal 6 version of the Scratchpads and will deviate from what you can actually see and do in some cases.
For feature requests and bug reports please use the Issues button which appears on the right hand side when you are logged in. If you have specific questions or would like advice or help in how to best set up your site, please email the Scratchpad team at scratchpad@nhm.ac.uk. Don't be afraid to ask 'stupid' questions and don't get hung up on a problem for hours. In some cases the solution might be easy (you just have to know it…) in others it might be a bug only our programmer can solve.
To get ideas you can also check what other people have done with their sites and how they have customized them: Browse the list of the current Scratchpads at http://Scratchpads.eu/sites. To find examples for certain features check out http://scratchpads.eu/live-examples-scratchpad-features.

Irina Brake, Simon Rycroft, Dave Roberts & Vince Smith
23 November 2010

To help us improve this course please fill out the feedback form at http://scratchpads.eu/feedback-form-training-courses.