

Scratchpad Training Course - Basic

This one-day course is intended to help current and prospective Scratchpad owners and users develop their site building skills.

The focus of the basic course lies on adding various kinds of data and generating taxon pages. Our goal is to provide a taste of what the sites can do, and allow you to independently explore the site after the event. We also offer an advanced course concentrating on the import of data, creating of custom content types and views, and managing of groups.

The basic course will cover:

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You can skip parts of the course you already know about, however, be aware that some parts build on each other. For example to do the taxon based chapters you need to import a classification first (see Taxonomy, steps 1-5).

Sections marked "Maintainers only" can only be done by users with maintainer role.

Training sites have been established at:

[http://training\[1-XX\].taxon.name](http://training[1-XX].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 '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>.

Basic features

Log in

1. Open a web browser (preferably Firefox), and go to the URL of your training site.
2. Log in to your site with the username and password given overleaf.
3. Once logged in, accept the terms and conditions and you will be taken to your user profile. You will be able to edit your credentials at a later point.

Note that the view has changed. What you see as a logged-in user is different to the view site visitors receive.

4. Click the Scratchpad training logo in the upper left corner to get through to the front page of your site. You will see the Scratchpad taskguide on the first page.

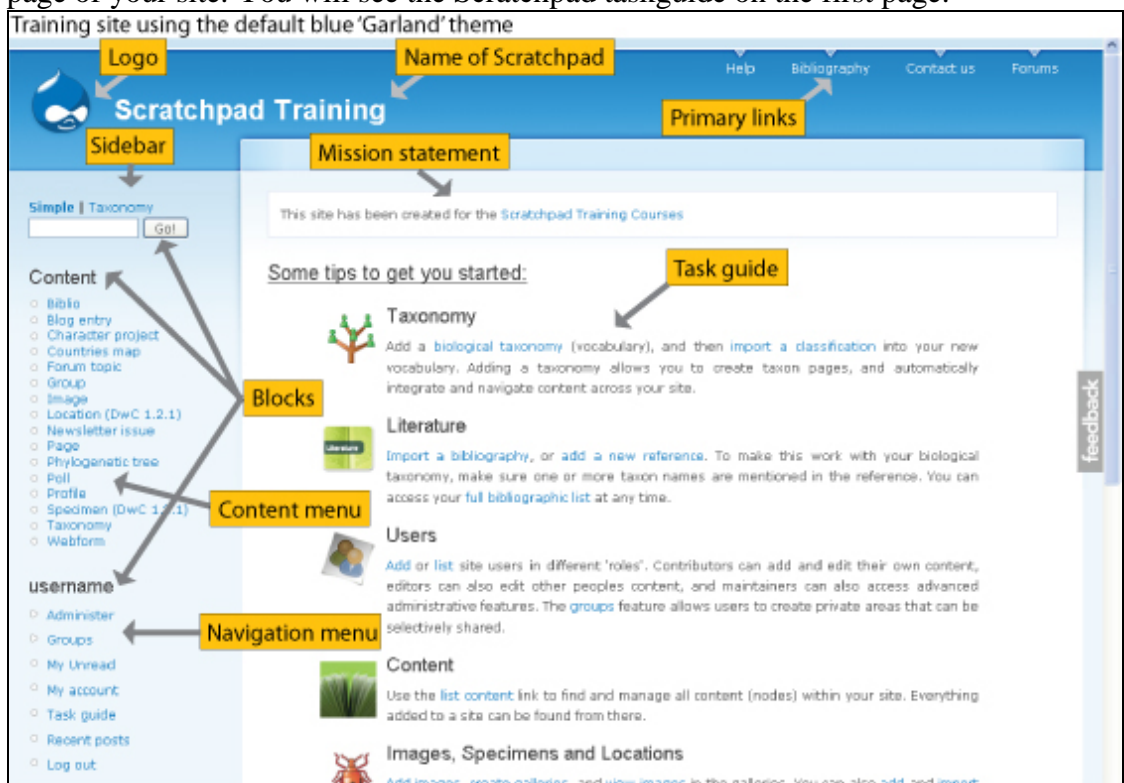


Fig. 1 Training site using the default blue 'Garland' theme

Taskguide A simplified overview of selected Scratchpad features designed to help you set up your site. It is only visible to users that have logged in. You can remove it from the front page but it is always available at <http://YourSite/taskguide>.

Add a page

5. Click on the 'Add a Page Node' icon which appears when you hover over the 'Page' link in the 'Content' menu on the left side of your site.
6. We need an introductory page for the Carnidae, so enter a 'Title', e.g. "Introduction to Carnidae", and some 'Body' text for your page and click the 'Save' button. You have just created your first page.
7. Edit content on the page by clicking the 'Edit' tab. The 'Body' section 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.
8. Note the publishing options available under 'Show Advanced Options' toward the bottom of the page. These options are available to most types of content published in a Scratchpad.

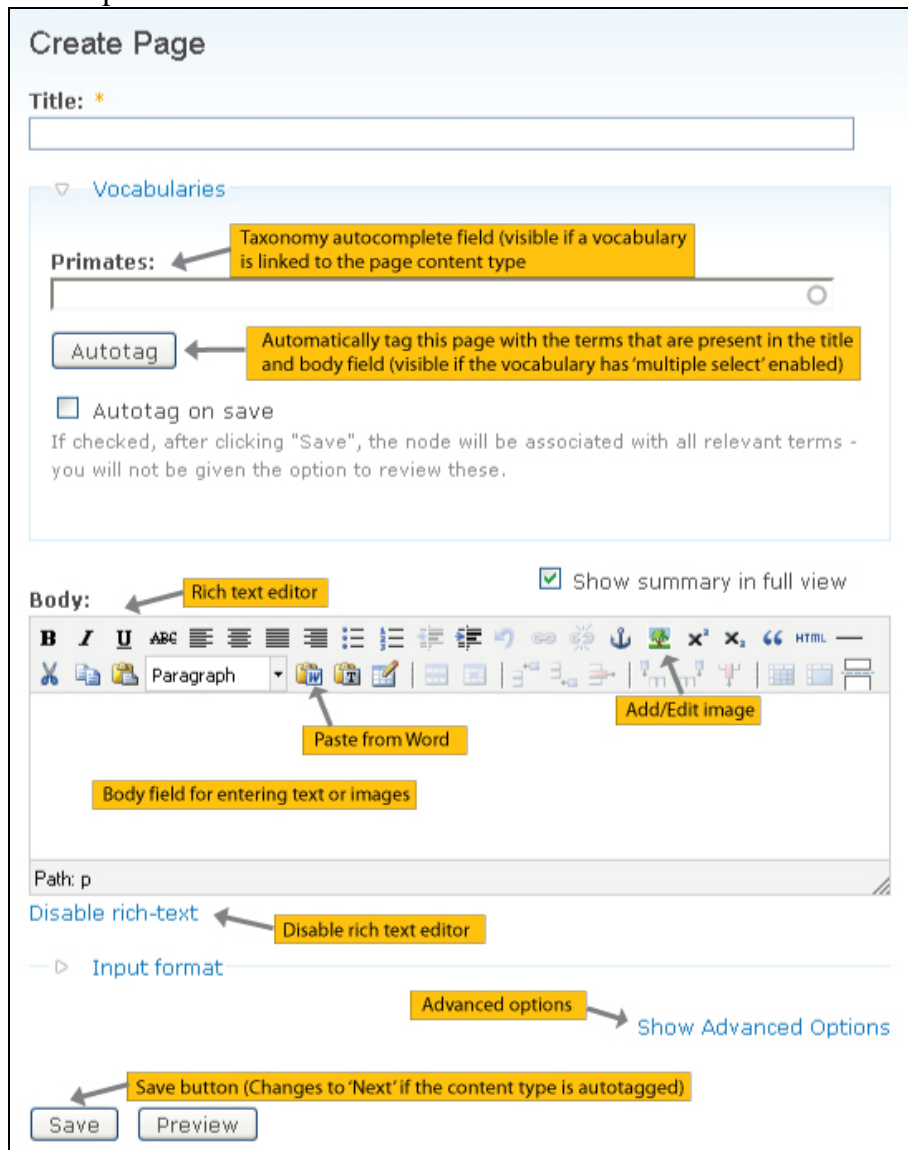


Fig. 2: Add a page node.

- Click the 'Save' button once you have completed the page.
- Click the 'Page' link in the Content menu to find the page you just made. Click on the link (in the title) to view the page.

'Content' menu This provides the various options for creating and accessing content in your site. Note the Roll over icons for adding or importing over each option data.

The Content menu is context specific. If you use it while on a taxon page, the added node will automatically be tagged with the respective term.

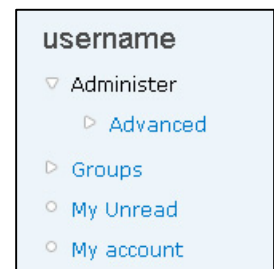
Rich text editor You can disable the editor by clicking on the 'Disable rich-text' below the body field. You will see the HTML representation of the text you have entered.

Tip: If you copy text into the rich text editor it will retain all the formatting of this text even though you might not immediately see this in the rich text editor. To avoid screwing up the format, click on the 'Paste from Word' icon, paste your text into the window that pops up and click on 'Insert' Then click on the 'HTML' icon and remove extra line breaks. Alternatively, you can paste text into the rich text editor and remove unwanted formatting in the html version.

Administration

Administration pages

Click the 'Administer' link in the 'Navigation' menu, which is the menu under your user name. You will see two options in the menu. A basic 'Administer' page and an 'Advanced' administration page. Only site maintainers can see and access the 'Advanced' administration page.



Add a logo **Maintainer only**

- Download "Logo.jpg" from <http://scratchpads.eu/scratchpad-training-files>. Click on 'Advanced' and 'Themes' in the 'Site building' section. Check that the Garland theme is 'enabled' and click on 'configure'.

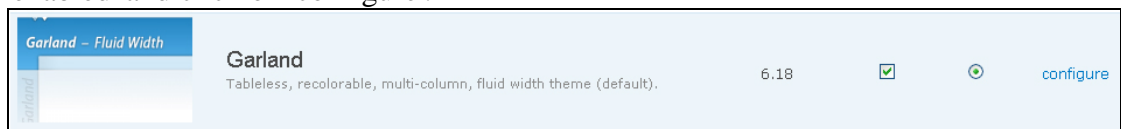


Fig. 3: List of themes: Garland theme

- If there is time, you can change the colour scheme, but first upload the logo image at the bottom of the page (*Warning: Logo images of more than 100 pixel height will obscure the screen*) (Fig. 4). Click on 'Save configuration'. Refresh your screen (e.g. by clicking Ctrl+F5) to actually see the changes you made.

Themes Themes define how your whole site looks. For some of the themes, like Garland, you can choose your preferred 'Color scheme'. Change the 'Custom' color set by clicking for example on 'Base color' and clicking on a color in the outer circle and then fine tuning the color by clicking in the inner square. The preview will change, so that you can see what is meant by 'Base color' and how your choices will look together before you save.

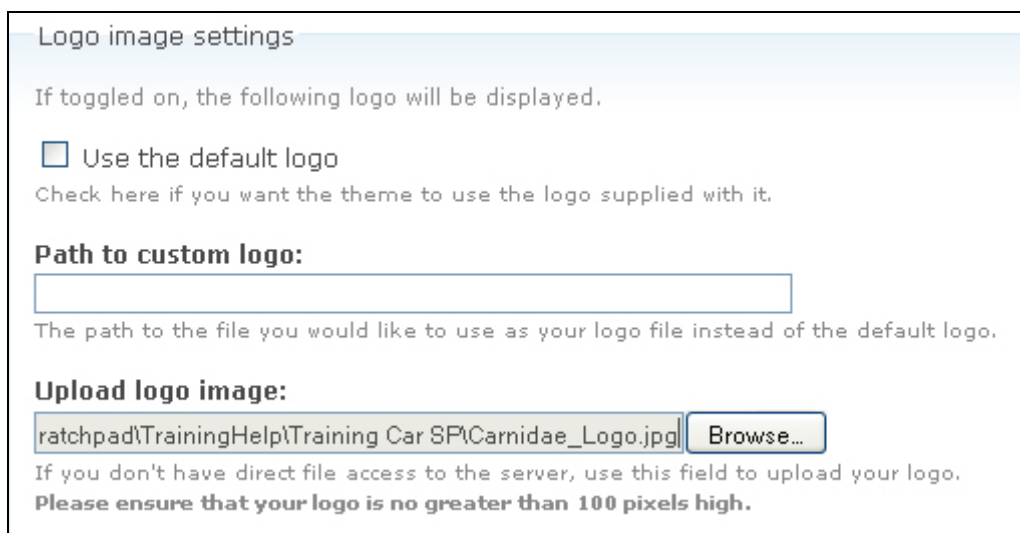


Fig. 4: Configure theme: Upload logo image

Add a new user **Maintainer only**

3. Go to the advanced administration page and click on 'Users' in the 'User management' section. The 'Users' page allows you to list all users of your site and perform actions (upgrade, delete, edit) on them. Click 'Add user' at the top, and fill out all the relevant boxes with your own information. *Note that training sites will come up with an error message on map related content. Just ignore this by clicking OK. This message is because the Google Map API is not specified on training sites. You can assign yourself to one of three roles and subsequently log in with this account.*

User roles

- **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

Change site name and front page **Maintainer only**

4. Go to the advanced administration page and click on 'Site information' in the 'Site configuration' section. Change the site's: Title (Name) to "Carnidae". If you prefer a static front page, instead of the default 'news' front page, you can change this under 'Default front page'. Enter the URL of the introductory page you created. Note the other fields available.

Nodes Each content page on the Scratchpad is called a node and has a unique number which is used in the URL of this node. Additionally, an alias URL is generated from the title. To find out the node number, edit the node and check the URL.

Taxonomy

Add a vocabulary **Maintainer only**

1. Click on 'Taxonomy' in the 'Content' menu and click 'Add vocabulary' at the top.
2. Minimally enter the vocabulary name (**Carnus**) in the Vocabulary name field; you can also add a description of the taxonomy in the Description field. Under the content types pull down menu, note that you can choose which types of content to associate your taxonomy with. By default, all content types are checked.
3. Under 'Settings' select 'ITIS Name' in the 'Content type' drop down menu at the bottom of the page. This is essential for importing biological classifications because it adds fields like 'Rank', 'Usage' and 'Authors'. Click 'Save'.

Having created a vocabulary you now need to add the list of terms (names). We are going to explore two different methods of importing a biological classification into your site.

Taxonomy Taxonomies do not have to be biological taxonomies. Country lists, keywords etc, can all be treated as "taxonomies" (i.e. controlled vocabularies) in the context of your site.

Import from EOL **Maintainer only**

4. Click the 'Import' tab and click on the new vocabulary you just created (Carnus).
5. Click on 'EOL' and enter "Carnus" in the text field.
6. Click search. The name "Carnus" appears in several possible classifications. Choose a Species 2000 classification, and click the 'Import from EOL' button.

This will import the complete classification of the taxon you type, into the Scratchpad. We recommend that you restrict your choice to groups that contain less than 50,000 taxa. When the import is complete, a TinyTax block with the classification will appear in the top left sidebar of your site. Refresh your browser window if you don't see this block.

7. To update your classification click on 'Taxonomy' in the Content menu, find the Carnus classification and click on the 'Editor' link. Explore the taxonomic editor (see Fig. 5, but note that the classification side will look slightly different).

The screenshot shows the 'Taxonomic editor' interface. On the left, a tree view titled 'Editing Carnidae' shows a hierarchy: Carnidae (expanded) contains Carnus (expanded), Carnus floridensis, Carnus hemapterus (selected), Carnus eggeri, Carnus setosus, Carnus mexicana, Cenchrinobia, Hemeromyia, and Mecynura. Below the tree is an 'Extend tree' button and the instruction 'Drag & drop names to move taxa'. On the right, the 'Form side' is titled 'Carnus hemapterus' and has tabs for 'Scientific Name', 'Usage', 'Reference', and 'Vernacular Names'. The 'Scientific Name' tab is active, showing fields for 'Rank:' (Species), 'Unit Name 1:' (Carnus), 'Unit Name 2:' (hemapterus), 'Unit Name 3:', 'Unit Indicator 1:' (- None -), and 'Unit Indicator 2:' (- None -). A 'Save' button is at the bottom. Annotations with arrows point to 'Add taxon', 'Delete taxon', 'ITIS Name fields', 'Extend tree', 'Tree side', and 'Form side'.

Fig. 5: Taxonomic editor, depicting a classification that uses the ITIS Name content type.

Import your own classification **Maintainer only**

8. Download the "ITIS_Taxonomy_Import.txt" spreadsheet.
9. Open the tab-delimited file in Excel. You will see a Parent-Child way of depicting the classification, which follows the ITIS (Integrated Taxonomic Information System) standard. Using a full hierarchy format is also possible for importing classifications. Close the file without saving. Then repeat steps 1-2 above using a new classification name (e.g. "Carnidae").
10. Click the 'Import' tab and then on the new vocabulary you just created.
11. Extend the 'CSV File' section, browse for the " ITIS_Taxonomy_Import.txt " file and select the 'ITIS Parent/Child' file type.
12. Click on the 'Import from CSV File' button and wait until the TinyTax block appears in the left sidebar.
13. Check out the new classificaton in the taxonomic editor. Click on 'Taxonomy' in the Content menu, find the new Carnidae classification and click on the 'Editor' link. Note that this classification includes synonyms, which are depicted in red color (Fig. 5).

Navigate the classification

14. Try browsing the Carnidae classification from the block in the left hand sidebar. Navigate by clicking on the plus icons and click on a taxon name to open the respective taxon page. *Note that content is cached, and sometimes the servers where this information comes from time out. Try reloading content (especially in Safari) a few times.*

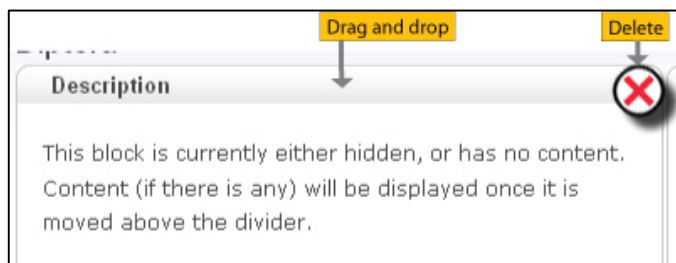
Blocks The 'Blocks' page is available via the basic and advanced administration pages. Configure blocks or drag and drop them into the preferred position. We recommend keeping the sidebars of your site relatively uncluttered, and perhaps not using the right sidebar.

Taxon pages (Widgets)

Browse to the "*Carnus hemapterus*" species page. Information is displayed in a series of "widgets" – we sometimes refer to these as "panels" or "windows". Most of the panels are currently empty. We are now going to learn how to curate the panels and later we will add data to populate this species page.

Curate taxon pages

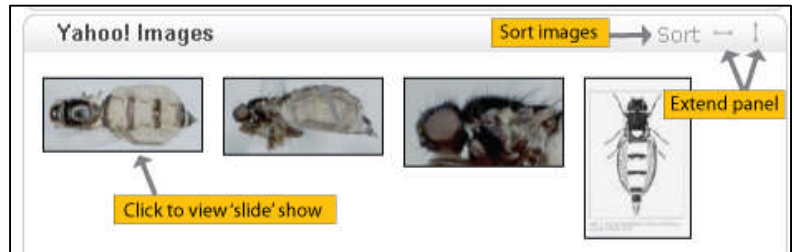
1. We want to improve the layout of the taxon pages. Click the "padlock" icon at the top of the page. Try dragging the widgets around to get the best arrangement, e.g. move the panels for the content you will contribute (bibliography, image, specimens, specimens map) to the top of the page. Also try closing some of the unused widgets (with no content) by clicking the red cross associated with those widgets.
2. When you have the arrangement you like, click the padlock icon again. You can choose to apply this arrangement to all taxon pages, or only to the page you just made.



When you first set up your site there will be a lot of widgets showing which you don't need. Close all unnecessary widgets as they will only distract from the content you want to present.

Curate a widget/panel

3. Next try clicking 'sort' within one of the widgets (e.g. Yahoo images). However with the mouse over the images and try "accepting" images you want to preserve in the



- list, and clicking the "cross" icon on images you don't want to see in your results list. You can also set the number to display. This will set the number for this widget on all taxon pages, not just the one you are viewing currently. Click 'Close' when you are done. Refresh your webpage to view the changes.
4. Try increasing or decreasing the size of a panel using the arrow keys in the top right corner of each panel. Any change is effective for all taxon pages that haven't been curated and had the changes only saved for that taxon.

ISpecies Widgets We have developed selected widgets that pull information from other sites (currently GBIF, Flickr Images, Yahoo! Images, NCBI, Wikipedia, Google Scholar, Morphbank and the Biodiversity Heritage Library). More can be easily added if the services of the data provider are appropriate for us to use.

Add a page to the taxon page

5. When looking at a taxon page, try creating a new 'page' as you did in the first exercise by clicking the 'Add a page node' icon in the Content menu. Enter a different taxonomic name in the title or body field, for example "Meoneura" and click on the 'Autotag' button. The page will be automatically tagged with any terms the system finds in the text and they appear in the Classification autocomplete field. Delete any terms you don't want this page tagged with.
6. Click 'save' and you will go back to the original taxon page you were on. A widget will appear with the text you have created.

To watch as the "Carnus hemapterus" species page fills with data 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 refresh the window (Ctrl+F5) to view the changes.

Literature

Import a bibliography

1. Firstly, 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. By default imported citations are not tagged to the classification. To enable autotagging go to the advanced administration page and click on 'Autotag settings' in the 'Site configuration' section. Under 'Default for "Autotag on save"' select "Biblio" and save the configuration. During the import all biblio records will now be automatically tagged with the classification terms which appear in the title or keywords of the record.
3. Download the "Biblio_Import.xml" file, which is in Endnote 8+ XML format.
4. Click the 'Import a Bibliography from your reference manager' icon appearing next to 'Biblio' in the 'Content' menu. This will bring up a form with a number of options. Browse for 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. Switch to the *Carnus hemapterus* species page, refresh it and scroll down to the Bibliography panel to see the biblios tagged with this term. Switch back to the Biblio page.

Autotagging means that when you save or import content, this content is automatically tagged with all the terms of the associated vocabularies that are present in the title or one of the other fields. If for example the title includes a binominal species name, the node is automatically tagged with this species name as well as the genus name, since the genus name is part of the species name.

Edit a reference

6. Click on the title of any biblio entry, which will take you to the node page for that entry, and click on the 'Edit' tab.
7. You can now edit this individual entry, changing any of the fields that you consider to need changing. Once you have made your changes press the 'Save' button.

Add a reference

8. Click on the 'Add a Biblio node' icon in the Content menu. Select the publication type 'Journal Article' (or anything else if you're confident), and fill out the fields given (do not worry about the initial warning message when selecting 'Journal Article'). Remember to select terms in your taxonomies or add taxon names to the Keywords section if you want this reference to be visible to your widgets (on your taxon pages).
9. You can also add a bibliographic record from the 'DOI' number of the publication, or by cutting and pasting the 'BibTex' record.

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: locality and specimen, which allows you to connect different specimens to the same locality.

Add a location

1. Click on the 'Add a Location (D.w.C. 1.2.1) node' icon in the 'Content' menu. Enter a **unique** locality title, because the locality title is used when referencing this locality while adding specimens. Add a more detailed description in the 'Locality' field, select a country from the drop down menu, and on the Google Map, click the position of your specimen. The latitude and longitude will automatically appear in the appropriate fields.
2. Click on the 'Extra Fields' link. Additional but rarely used optional fields are present within this section. Then click save. This creates your location record.

Add specimens

3. Click on the 'Add a Specimen (D.w.C. 1.2.1) node' icon in the 'Content' menu. Once the page loads you will be confronted by five different tabs: Required, Taxonomy, Collection, Miscellaneous, and Location (Fig. 6). Each of these tabs has different fields that can optionally be completed in order to create a new specimen record.
4. We will create a fictitious specimen, so no need to worry about getting the required information correct. Fill out the fields under the Required tab.

Required fields Each content type contains compulsory fields, which are marked with an asterisk (*). These are deliberately kept to the bare minimum.

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 some more information under the 'Collection' and 'Miscellaneous' tabs, this can be as little or as much as you like.

Autocomplete fields Each field that is based on a taxonomy uses the autocomplete function. As you start typing a list of terms starting with these letters will appear. The more terms you have in your classification, the more letters you need to type before you can select one. You need to select a term before you can continue with saving or searching for this term.

BMNH IBC 3219144 View Edit Clone

Required Taxonomy Collection Miscellaneous Location

Basis of record: *
Preserved Specimen
A descriptive term indicating whether the record represents an object or observation.

Institution code: *
BMNH
The code (or acronym) identifying the institution administering the collection in which the organism record is cataloged. No global registry exists for institutional codes; use the code that is "standard" at your institution or in your discipline.

Collection code: *
IBC
The code (or acronym) identifying the collection within the institution in which the organism record is cataloged.

Catalogue number text: *
3219144
The catalogue number (text) for this specimen

Figure 6: Add a specimen record.

7. Finally, under the 'Location' tab, select the location you created in steps 1-2. Now press the 'Save' button.
8. You should now be taken to a page where you can view your specimen.
9. Click on 'Clone' to create a similar specimen from the same locality by just changing the 'Catalog number text'.

This specimen can now be linked to from an image. In practice most people will (at least initially) want to enter locality and specimen records in bulk. This can be done by importing a comma or tab separated file created within an Excel spreadsheet. Importing is explained in the 'Manual for advanced training course'.

Images

Add an image

1. Click 'Add Image node' in the Content menu. You are presented with an option to upload single or multiple images. Try the single image option first.
2. Enter a title (e.g. "Carnus hemapterus, male") and enter "Carnus hemapterus" in the Carnidae classification box. Select the 'Library' image gallery.
3. Complete the appropriate fields relevant to your image and browse for the "Car_hem_M_lateral.jpg" image. *You can upload another image into the same node, which will result in both images being shown on the same page. However, usually it will be better to upload each image as a separate node.* Click 'Save'.
4. Click on the image link in the Content menu. You will see your image in the 'Library' gallery. Try clicking into the gallery, clicking on the image title, and editing the annotations associated with the image. *When you click on an image title in a gallery, the image node opens. When you click on the image itself, a sort of slide show opens in which you can move from one image to the next.*

Image galleries To create an image gallery click on the 'Add a Image node' icon in the Content menu and then click on 'Add a new image gallery' below the Image gallery drop down box. Give the gallery a name and description. Under the 'Advanced options' you can choose a parent image gallery or a 'weight' for the gallery to determine its position relative to other image galleries. The default gallery is simply called 'Library'.

Image gallery names are part of the image gallery vocabulary. If you want to edit a gallery name or delete a gallery you need to do this via 'Taxonomy' in the Content menu.

Upload multiple images

5. Click on the 'Upload multiple images' icon next to the 'Image' link in the Content menu. Click the 'Add files' button, select several example images and wait for the file names to appear in the upload box. Click on 'Start upload'. and click on 'Edit uploaded images'. This opens a matrix editor in which you can select several fields in one column (Ctrl+click) and link the respective images to the same image gallery or specimen for example. This matrix editor is a work in progress. Currently, images need to be annotated individually to tag them to the classification or add further information. Head back to the image gallery to see your newly uploaded pictures.

Advanced options On each node there are additional options available when clicking on the 'Show advanced options' link at the lower right corner of the page. Options include creating a menu link, making the node private (disable 'Published'), publishing to the front page, creating new revisions, enabling or disabling comments, and attaching files.

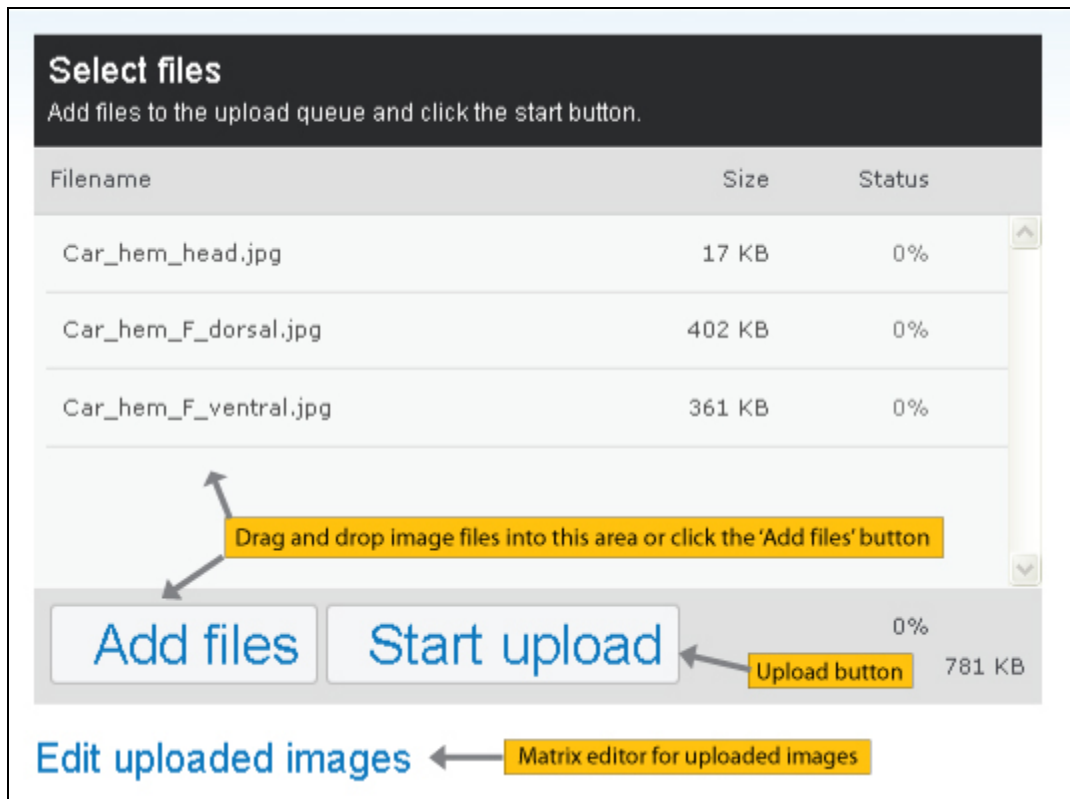


Figure 7: Multiple image upload.

Menus The 'Menus' page is available via both administration pages. Add a new menu (e.g. "Home") and add two menu items to this menu. Drag and drop menu items into a different position. The menu will only become visible when you activate the block on the 'Block' administration page by e.g. moving it from the 'Disabled' section to the left sidebar.

Character projects

Build a character matrix

Our data matrix editor is a work in progress. It allows you to build a database of characters suitable for phylogenetic analysis, identification keys or tables of numeric or textural descriptions. Currently you can export controlled characters into SDD format and DNA characters into NEXUS format. Subsequent work on the editor will support the import and export of data in various formats for phylogenetic analysis, key construction and character lists and datasets formatted for publication.

1. Click on the 'Add a Character Project node' icon in the Content menu. Give your project a title and a brief description.
2. Under 'Vocabulary', choose the Carnidae classification and enter the terms you would like to include in your project. If you have many taxa it will be easier to select taxa at the next stage. Click 'Save'.
3. If you haven't selected your taxa already, click on the 'Select taxa' tab. You can select your taxa by checking them in the extendable classification tree. If you select a taxon while the tree is not extended, all child taxa of this taxon will be selected as well. If you select a taxon while its child taxa are extended, only the taxon itself will be selected.
4. Add some characters by clicking the 'Add Character' button on the right hand side of the matrix. Try a mix of restricted characters, numeric characters and text characters. Each character has to be added to a group. Try creating several groups.
5. Try 'Scoring' the characters in the data editor, just like you would if you were editing data in an Excel spreadsheet.
6. Click on the 'Organise characters' tab to change the order of your characters. Try dragging and dropping the characters within a group and between groups. *The latter currently does not save due to a bug (23.9.2010)*

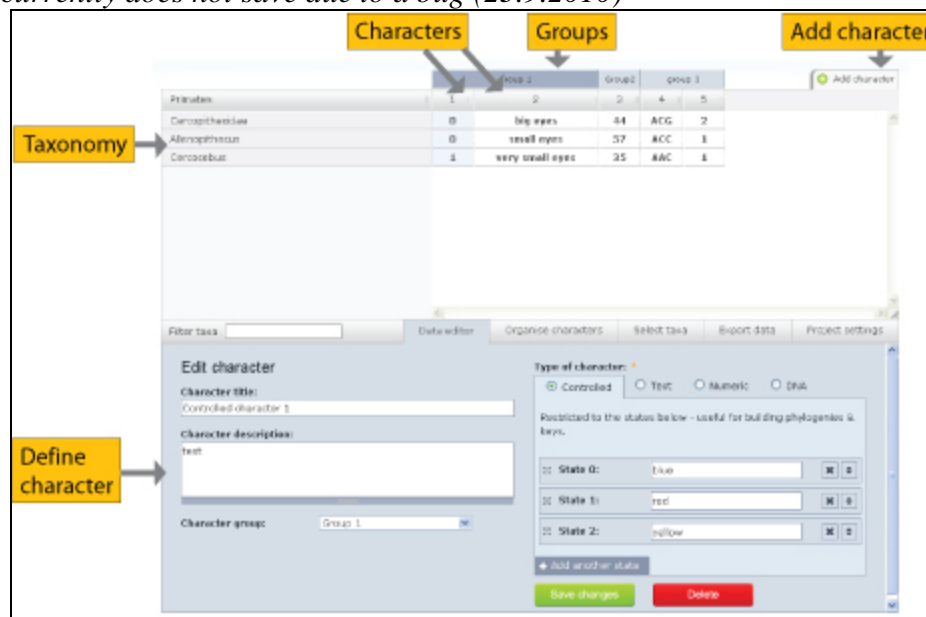


Figure 8: Character project in edit mode.

Other content types

On your own, explore the other content types

1. Countries map
2. Phylogenetic tree. There is no Carnidae species tree, so we will use a mammal tree. Copy the text of "Phylogeny.txt" into the 'Nexus or Newick data' field and tag it to *Carnus hemapterus*.
3. Taxon description. The taxon description content type is based on TDWG's SPM (Specimen Profile Model) standard. *Data in this content type can be harvested by EOL if the Scratchpad maintainer signs an agreement with EOL. Within a Scratchpad, taxon descriptions are used as part of the publication module to publish Scratchpad data in a journal. The publication module is still a prototype, but if you ever intend to use it, it would be wise to make use of the taxon description content type for your descriptions.*
4. Blog

Try to create example content under each of these content types and make it appear on the *Carnus hemapterus* species page.

Search

There are several ways to find specific content on a Scratchpad. One way is to use the Search box in the left sidebar, which has three different search options: simple, taxonomy, and advanced.

Search box

1. The default is the simple search. Enter a word from one of the pages you created in the search field and click on 'Go!'. You will get a list of all the content on the Scratchpad which contains your search term.
2. If you want to find a specific taxon page or content tagged with a specific term in one of your taxonomies, you can use the taxonomy search. Click on 'Taxonomy' above the search field, wait until a grey circle appears in the field indicating an autocomplete field, and start entering a term used in your classification, e.g. "Carnus". As you type, terms will (slowly) be listed underneath the field and you can choose the correct one. If no terms appear your word is not part of a taxonomy. Click on 'Go!'. You will usually get a taxon page. If not you will get a list of all the nodes which are tagged with this term.

If your classification is set up to allow taxon pages, you should view a taxon page (widgets) as result of a taxonomy search. However, if your term is part of several vocabularies, e.g. the biological classification and an image gallery, then the system gets confused and shows just a list of content. If this is the case you will have to find the taxon page via navigation of the tree in the classification block.

Advanced search

3. Advanced search: Click the 'Go!' button without entering anything in the search box. Click on 'Advanced search' to extend further options. Enter your search term and choose the category or type of data you want to search, e.g. check 'biblio' if you only want to search for bibliographic citations. Note that for biblio nodes there are special filters available when clicking on 'Biblio' in the Content menu and then 'Filter'.

Content lists

Further options to find content on a Scratchpad are through the Content menu as explained in the 'Basic features' chapter, through 'List' Content/Data in the basic administration page, through the 'Track' option under 'My Account' in the Navigation menu, and through 'Recent posts' in the Navigation menu. When using the first two options, the content is or can be sorted by content type. When using the last two options the content is sorted by date of last editing. Content that is not published is best found via 'List' Content/Data.

List Content/Data: Click on 'List' in the Content/Data section of the basic administration page. From here you can access all the content or "Nodes" that have been created on your site. You can filter by a particular content type, and also perform updates on selected nodes.

My Account: Click on 'My account' in the Navigation menu to view your account. Click the 'Edit' tab, to change the information associated with your account, including your name and password. You can see all the content you have recently created under 'Track'. For people that use OpenID log-in, they can add their OpenID identity. This enables them to log into more than one site with a single 'OpenID' identity.

Forums

Create a forum **Maintainer only**

1. Go to the advanced administration page by clicking on 'Administration' and then the 'Advanced' link in the Navigation menu and click on 'Forums' in the content management section.
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. Save.
3. You can also add a container to organize your forums better. Click on the 'more help' link for further information.

Forums			
Post new Forum topic			
Forum	Topics	Posts	Last post
Container 1			
Description for container 1			
✉ Forum 1 Description for forum 1	1	1	6 sec ago by username
Container 2			
Description for container 2			
✉ Forum 2	0	0	n/a

Figure 9: Forums using containers.

Add a forum topic

4. To add a new forum topic go to the 'Content' menu and hover with the mouse over 'Forum topic' and click on the 'Add a forum topic node' icon which appears to the right. Enter the Subject, choose the forum in which you want to submit your topic and enter the text of the topic in the 'Body' field.
5. Depending on the Scratchpad settings you will also be able to choose a taxonomy term. Save.
6. To reply to a forum topic click on the 'reply' link. Enter a subject and your comment.
7. Click on 'Preview comment', edit the text if necessary and click on 'Post comment'.
8. You can access the forum if you click on 'Forum topic' in the 'Content' menu.

Email integration of forum You can integrate the forum with your email, so that you will receive emails about new forum posts and can reply to these via your email. This is done via your personal account. Go to 'My account' in the Navigation menu and click on the 'Forum/E-mail integration' tab. Select the forums you want to integrate with your email and click the 'Subscribe' button. You can also add additional email addresses from which you will be able to send emails to the forum. However, you will not receive forum emails on this address.

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>.

To apply for a new Scratchpad go to <http://scratchpads.eu/apply>.

Irina Brake, Simon Rycroft, Dave Roberts & Vince Smith

16 July 2010

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