



Welcome to iDigBio – the walking tour

2/5/16 3:38 PM

Version 2.0 for Scripps Institute of Oceanography (SIO), Feb 2016
(NOTE TO DEMO DRIVER: do not be logged in, or log in as someone with only the usual default powers)

DEMO BEGIN

Gil has given you the 5000 ft level overview, now we are going to get down on the ground and walk into a few of the resources.

START HERE: <https://www.idigbio.org>

NOTE: the website has colour coordination as part of its design – unless you are colour blind, you can use the colours of the bar headings to gauge where you are in the website. The colours align with our logo and they represent 4 parts of our mission and, via the website design, seek to help people go down the right alley. Each of the four areas on the site has a colour matched navigation bar (blue, green, orange and yellow) across the top of its sub-home page.

NOTE: you may come to identify that there are three technology parts of the site – Drupal (our content management software), the Wiki and the portal. We try to give a united visual front, but given their subtle differences, it is wise to distinguish what technology you are looking through. I'll point out the differences as we move around.

- Drupal is mostly for staff to create project-related content
- Wiki is a place where everyone involved in ADBC is welcome to contribute
- Portal is for read-only data display

NOTE: dedicated SEARCH is available on every page in these pages if you know what to look for. See upper right.

NOTE: if you are logged in or wish to login or create a logid – you will find links in the upper right next to 'Search'. If you are logged in, your logid will be visible there.

NOTE: Feedback is available on the right hand margin on every page, or in the case of the portal on the green navbar.

NOTE: it should go without saying, like many corners of the internet, that there are usually several ways to get to the same content, so have your way-finding antennae on high alert.

This is our HOME page, it contains high-level visual navigation aids. It may be that your 'home' is one of the lower sub-landing pages (bookmark accordingly). Let's take a visual tour of this main iDigBio landing page.

- A snapshot of the current portal counts, and importantly, a speed link to search for specimen records.
- A link to our 'visitor' video – 'why digitization matters'
- Some postage stamps call out to our communities of interest
- Further colour-coordinated navigation by role: researchers, collections staff, teachers and students

Down the left-hand side are Upcoming Events, News, Latest Reports

Along the bottom a list of some of the latest collections added to the portal

In the middle is the carousel, a small scrolling set of teasers to reports from recent workshops and events.

On the lower right a scrolling Tweet viewer and in the middle a list of recently ingested datasets.

Let's go to the BLUE channel – all about the project

GO HERE: <https://www.idigbio.org/about-idigbio>

NOTE: the colours of the links in the nav bar – blue and orange

This is all about the iDigBio project itself (reading across the blue nav bar)

Looking at each of the cascading menus – note the About, etc. (move mouse to each of them and show the menu choices)

- our mission, scope, staff directory, NIBA/ADBC documents, social media and system status, and tips on writing a proposal to ADBC program
- our collaborators (TCNs and PENs) Wiki pages, their collaborator maps, their reports, and tips on how to collaborate with us on your TCN/PEN proposals.

- NOTE: this menu is important for you (TCN PIs) to remember to aid in your participating in the bi-monthly Internal Advisory Committee (IAC)
- Upcoming events - workshops, meetings – list or calendar view – your choice. Note the iCAL icon on the bottom of the page, and the button to put a new event on the calendar.
- News – current news, create a news article, newsletters, articles that appear in the carousel
- Contact us and a site map (another way-finding tool)

See the familiar Tweet across the bottom and a sample image ingested, along with a staff highlight.

Let's go to the GREEN channel – for Researchers & Searchers

GO HERE: <https://www.idigbio.org/research>

NOTE: the shortcut to the sections below called out across the green navbar, and the role-based content on the left

- Organized by TCN year, these are links to the Research topics proposed by each of the TCN/PENS
- The top of this page has links to TCN research content, as well as their presentations at last year's Summit (**Watch Highlights**)
- This is access to the portal, and some third-party research-oriented tools where we have demos showing how they work using our API.
- Links to tools:
 - our specimen portal
 - community research tools:
 - Phylojive – linking phylogeny, biogeography, geology and paleobiology
 - Lifemapper
 - Arbor Flows
 - Suggest others
 - Research publications
 - Recordings on presentations in workshops (tip: look also in the Bibliography under Multimedia Resources)

We'll cover the portal part of the tour later in the walking tour

Let's go to the ORANGE channel – for collections/data/digitization people

GO HERE: <https://www.idigbio.org/technical-info>

This is where mostly the Wiki lives, with all the digitization workflow and workshop documents (the heart of our outreach activities).

- Technical Info is a list of key policy documents
- The next two navbar links near the top of the page :
- Access to working and interest groups, their memberships, their activities
- Access to Workshops/Webinars in the calendar view, can also display in List View. Look for the 'iCal' links to be alerted (RSS) when anything new goes onto the calendar
- Digitization – use the power menu on the upper right to delve into major topic areas. OR the big postage stamp on the upper left. This is our archive of all the presentations and workshop/webinar material since the beginning
 - Wiki Formatting Help – very useful guide when you want to create your own Wiki page. All iDigBio participants are welcome to do so, all you need is a login, and you get that via the upper right link – single sign-on to the whole website.
 - Note the menus in the left column – more power links to related content
- 3 links to different kinds of proposals you can submit
- A link to some specific tagged content – the general bibliography, or just by Multimedia – chances are you will find all of our workshop recordings there.
- Check out the Wiki home and look at the left hand menus
- **Note: you are in the Wiki – look over its user interface characteristics**
 - Project resources
 - Content Style Guide – good info about tagging documents, an absolute MUST for creating content
 - Project management material

- TCN Resources
- Data Ingestion Guidance and dashboard
- listservs – how to subscribe and unsubscribe
- Now let's get to the our repository of digitization documents. There are several ways to get here:
- From the left hand side menu 'Digitization Resources'
- From the home page – select 'Digitization' – left 'postage stamp' -> gets you to Digitization Resources
- From drop down choose Technical Information -> Technical Info
 - Digitization Workflows
 - Workflow Modules
- These are sub-categories of the general digitization area.
- Also
 - 'Digitization' -> gets you to Digitization Resources
 - Organized by workshops, interest groups and Digitization Avenue
 - Good for : If you know when or where a workshop was located
- Become familiar with our 5 Task Clusters organization
- Check out the right 'power' box of key resource areas. We use this style on various Wiki pages to give you power access into the material.
- Note: many documents (derived from a specific workshop, for example) may be on more than one page of resources, so it would not be unusual to find what you are looking for in more than one place.

When in doubt – Google 'iDigBio' and whatever you are looking for. The result will be more pleasing than our within-site searching

Let's go to the YELLOW channel – for E&O people

GO HERE : <https://www.idigbio.org/education>

This is an evolving area, with the arrival of Molly Phillips to that role. There is some preliminary material there, but look to see it grow in the months to

come, and you can add your own topics as well, contact Molly, she is heading up the E&O working group.

- Whenever you see 'Documentation' (under the 'Education' navbar) as a link that means it is an index to all of our content with a tag = Education (for example)
- For more about topics supported by tags see: the left sidebar. BUT this is just content managed content (Drupal) and is NOT an index to the Wiki material.
- K-12 Resources is a good place to start when looking for ideas about E&O access to iDigBio and TCNs endeavors.
- Check out Citizen Science for the latest in our involvement in that area, to give you ideas for proposals, and how to get your own project involved.

SPECIMEN DATA PORTAL – last but not least

GO TO: <https://www.idigbio.org/portal>

Who can tell me how to get to eh portal from here?

Let's take a tour of the portal to familiarize you with what kinds of things you can do:

- Firstly - There are two ways of interacting with the data in the portal, via the user interface, and via the API. We'll cover the UI first
- Examine the **pie charts on the Portal Home page** – these are derived directly from the data – the kingdom field, can click and search by those high level terms.
- **Collections:** From the Data entry on the green navbar, one of the first things to do is to check your entry in the Collections table.
 - Check your institutionCode, collectionCode, contacts. Either add or update.
 - View either by list or by map
 - **Using the Settings**, select the fields you want to display from the records.
 - **Add a new institution:** choose this to add/edit data

- **Tutorial:**
 - Browse the tutorial to see what level of info you can count on seeing there – note the table of contents on the right to guide your inquiry.
- **SEARCH Records**
- Go to the Advanced Search – note the three sections – the search form, the map area and the query results on the bottom.
- Understand the distinction between the two different modes of search (BTW: not case sensitive)
- 'search all fields' match.
 - Search all fields mode – e.g., looking for 'Rosea', or anything related to Rosea, directly or in its habitat, embedded in text, etc. For this, use the top/first field in the Search Records or Search Advanced box.
- 'exact match' - these are auto-match
 - Exact match mode is in every other field except the top. Tip: allow the dropdowns to give direction. They contain what is in the data records in that field. This way you avoid typos and you see what others have used that field for.
- **There is no wild card searching.**
- Note the 'must have's for media and map geopoint data
- Note the 'Present' and 'Missing' options on any field
- Note the 'Reset' button on the whole query form
- Note the 'Help' link – this is brief assistance on the query form.
- If you don't see a field you want to search in, look in the 'Add a field' for the remainder of the indexed fields, drawn exclusively from Darwin Core terms
- Terms are additive, providing for the logical 'OR'. For example, if I want genus 'Carex abacta specimens along with 'Carex brevior – put carex in genus and brevior and abacta in the specific epithet. Consider the power of searching in this way across taxa, geography etc.
- Family, Genus and Scientific Name filters provide an "Add Synonyms" button which uses the [Encyclopedia of Life API](#) to find synonyms for names entered in the text box. Clicking the button

once you have entered a name or multiple names will add any found synonyms to the text box.

- **Mapping:** anytime you are looking at the map, when you click on one of the blocks you will see a synopsis of the record
 - In the Map view, you can filter by records found within circles or rectangles

- **Publishers:**
 - Examine the publisher summary, search in the top table for aggregated recordsets, like an institution's IPT, select on, in the subsequent table, sort the recordsets
 - Go to one of the recordsets. Note the UUID related to that record set in the URL.
 - On this page, you will observe whatever information the provider put into the metadata (EML file) for the recordset
 - Note the three different areas:
 - title, last published, record/media counts
 - EML recordset description with contacts
 - Three tabs
 - **Data corrected** for the index layer to improve aggregated search.
 - **For a description of what the flags mean**
 - **Data use** - monthly usage statistics, by searched, downloaded, seen, viewed (record and media)
 - **Search** indicates in how many instances a record from this recordset matched a search query. **Download** indicates in how many instances a record from this recordset was downloaded. **Seen** indicates in how many instances a record from this recordset appeared (visually) in the search results in a browser window. **Records Viewed** and **Media Viewed** indicate how many specimen and media records were opened and viewed in full detail.

- **Raw** – the metadata of what was sent to us
- Go to 'Search Recordset' to look at the specimen data
 - Note the 'Columns' button on the right, go here to customize which columns you would like to use to view the query result
 - Note the different tabs above the result set:
 - **List** – the default view
 - **Labels** – a representational 'label' view
 - **Images** – if available (media)
 - **Recordsets** – a synopsis of the recordset(s) within which these query results reside
 - Use the 'View' link to go to the details of one record. Similar tabs are here as well to see Data, the Flags and the Raw.

○

- Back on the 'Search Records' page, note the four tabs in this block:
 - **Filters** – default tab, guides the search options
 - **Mapping** – allows searching by map boundaries, and shapes, use the density blocks in the map to examine records (uses data ONLY with geopoint info)
 - **Sorting** – determines the sorting of the query results
 - **Download** – download a query result, enter your email address and you will receive a notice of where to pick it up once the zip file has been prepared. You will get a complete Darwin Core archive. If you try to download the whole portal, be prepared for SIGNIFICANT wait time.

The second and to my mind exciting/unusual way to use the data is via the portal API, it is a power tool – see 'Data' dropdown for documentation on how to use the API.

You can install an app in your Chrome viewer to look at a nice display of your API JSON* query results:

[http://search.idigbio.org/v2/summary/top/records?top_fields=\[%22institutioncode%22,%22collectioncode%22\]&count=500&rq={%22recordset%22:%2225975bbda-cd92-4084-8a09-ce1e28e6164f%22}](http://search.idigbio.org/v2/summary/top/records?top_fields=[%22institutioncode%22,%22collectioncode%22]&count=500&rq={%22recordset%22:%2225975bbda-cd92-4084-8a09-ce1e28e6164f%22})

to view all the recordset 's 'institutionCode's using its recordset GUID

Search for Spotlight: A fun note embedded in our Newsletter, Biodiversity Spotlight. There is a link back to the portal to view the species mentioned in the article

<http://portal.idigbio.org/portal/search?rq=%7b%22scientificname%22:%22Danaus%20plexippus%22%7d>

*search for 'JSON viewer': a web browser plug-in - there are several