



Biodiversity Databases

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Specimens are the fundamental particles of biodiversity

- Only individual organisms, living or in collections, carry biodiversity information.
- Everything we know about biodiversity ultimately arises from taxonomically and spatially referenced individuals:
 - > What they are. Where they are.
 - > How many individuals there are and in what density.
 - > How many species there are in a place.
 - > How many places a species is found.





Kinds of biodiversity databases

- Specimen databases: spatially and taxonomically referenced records of individuals
- Species databases: spatially and taxonomically referenced records of species' presence or approximate abundance
- Spatial range databases: spatially and taxonomically referenced polygons representing species' presence





What is Biota?

- A biodiversity data and collections management application for taxonomically and spatially referenced specimen data
- Website: <u>http://viceroy.eeb.uconn.edu/biota</u>





Biota's origin

- Biota was initially developed for *Project ALAS* (The Arthropods of La Selva Project).
 - An inventory of 100 families, superfamilies, and orders of insects, mites, and spiders in lowland Costa Rican rainforest
 - Nearly 300,000 specimens in 12,412 species, including 203 holotypes and 1239 paratypes
 - 7 PI's and >100 systematist collaborators from 50 Costa Rican, North American, and European institutions
 - Funded by NSF from 1994 through 2006
 - Website: <u>http://viceroy.eeb.uconn.edu/alas/alas.html</u>





Biota's history

- Early visitors to the ALAS laboratory made clear that a generalized version of Biota would fill unmet needs.
- Version 1 released for Mac OS in December 1996; for Windows in June 1997.
- Ten free updates for registered users (1997–2002)
 each with new features and tools suggested by users.
- Biota Version 2 was released in later 2003, with major new features.





Who uses Biota today?

- About a thousand users in more than 30 countries, 44 US States (based on sales and registrations).
- Individual researchers in ecology, systematics, biogeography, and conservation biology.
- Biodiversity inventory projects.
- Natural area and field station managers.
- Museums, herbaria, botanical gardens, and private collectors/observers.





A few technical details (Biota 2)

- Platforms: Windows 98/2K/ ME/XP/NT4, Mac OS 9/ X (native)
- Formats: Desktop (stand-alone) or multiplatform Client/Server. Onboard web server supports web clients.
- Data Files: Instantly interchangeable between all formats and platforms
- *Engine:* 4th Dimension 6.8; beta version in 4D 2004 (<u>www.4D.com</u>)





- *Documentation:* A 600-page pedagogical Manual with Tutorial plus in-context help
- Support: By email, normally within 24 hours
- Updates: Free maintenance updates for registered users.
- *Publisher:* Sinauer Associates (since 1996)
 (<u>www.sinauer.com</u>)





Financial considerations

- Market niche: An off-the-shelf, low cost (\$200 for desktop version) biodiversity data management solution for individuals, projects, and institutions.
- Development costs: NSF until 1996; University of Connecticut (my salary).
- Pricing: Fair profits for the publisher plus developer royalties sufficient to cover ongoing costs of development tools and engine licensing. (Biota has been self-supporting since 1996).





Biota design objectives

- Maximize user autonomy (self-training possible and no on-site support required).
- Minimize structural complexity, while implementing key relational properties of specimen-based data.
- Flexibility, customizability, and scalability.
- Open administrative access to all tables and keys.
- Comprehensive import tools for legacy data.
- Comprehensive export tools to guarantee future access to data.





Early development based on ALAS needs

- An industrial approach to specimen preparation and data management
 - Parataxonomists carry out most steps.
 - Specimens individually barcoded and databased.
 - Special tools optimized for inventory work
 - Specimen loan system to track material sent to collaborators and to comply with INBio agreement.





Relational database structure

- An indented table shares some features with a relational database.
 - > Each distinct entry is made only once.
 - > Columns correspond to *tables*, rows to *records*.
 - Each record in one table may be a linked to one or many records in another table.
 - In a hierarchy of tables, we may speak of parent and child records.
 - The relational model can accommodate any logical structure, not just hierarchies.



| Family | Genus | Specific Name | |
|---------------|---------------|---------------|--|
| Campanulaceae | Centropogon | caoutchouc | |
| | | erianthus | |
| | Lobelia | laxiflora | |
| | | salicifolia | |
| | Siphocampylus | ecuadoriensis | |
| | | sanguineus | |
| | | scandens | |
| Ericaceae | Anthopterus | verticillatus | |
| | Cavendishia | forreroi | |
| | | gilgiana | |
| | | leucantha | |
| | | lindauiana | |
| | Ceratostema | nodosum | |
| | | peruvianum | |
| | | reginaldi | |
| | Macleania | bullata | |
| | | cf. ericae | |
| | | coccoloboides | |
| | | glabra | |







Biota's relational structure: Core Tables

Biota is structured around 14 Core Tables.

- The taxonomic hierarchy includes the Specimen table and a table for each of the seven obligatory taxonomic ranks: Species, Genus, Family, Order, Class, Phylum, and Kingdom.
- > The place hierarchy has two levels.
 - The *Collection* table records data for collecting events.
 - The *Locality* table records the location of one or more collecting events.

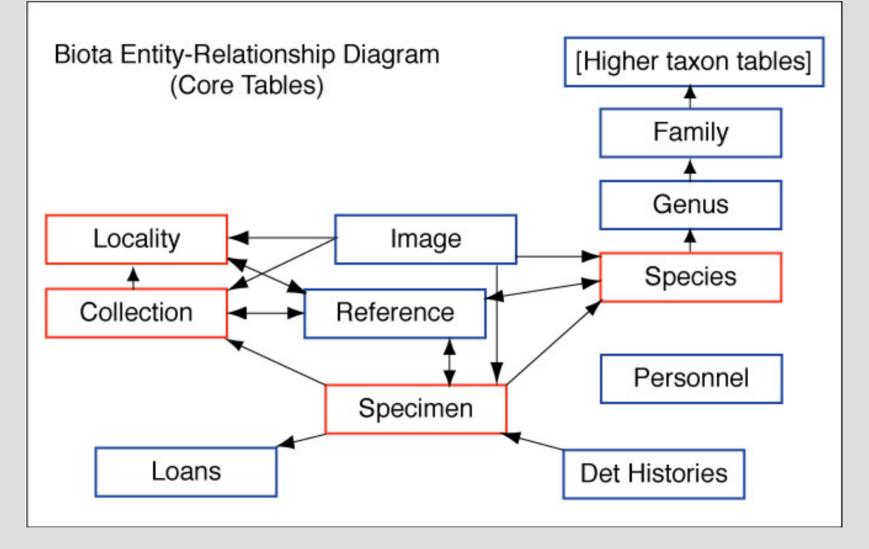




- Literature references are recorded in the *References* table.
- Names and contact data for collectors, preparators, borrowers, project participants, and authors of notes are recorded in the *Personnel* table.
- To keep track of specimen loans, the *Loans* table records which specimens have been loaned, borrowed, and returned.
- Changes in Specimen identification are recorded in the Determination History table.











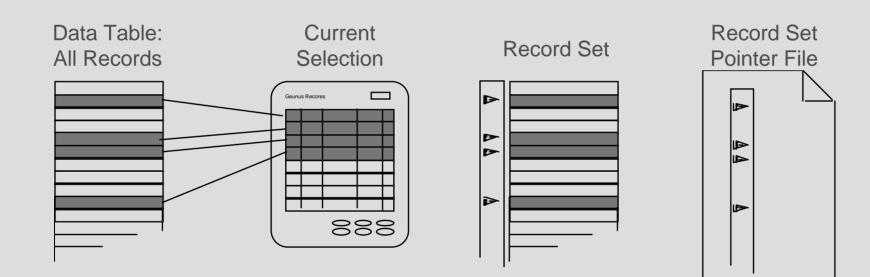
Biota's relational structure: Peripheral Tables

- 20 Peripheral Tables keep track of supporting or ancillary data related to Core Table records.
 - > Auxiliary Fields
 - > Notes
 - Projects
 - Linking tables
 - ...etc.





Four representations of records







Database tasks

- Entering data
- Updating records
- Finding records (queries)
- Working with Record Sets
- Importing and exporting data to text files
- Displaying, printing, and publishing data
- Maintaining database integrity and security





Database tools

Tools carry out specific tasks for

- Individual records
- > All records in a table
- A selection of records from a table
- Linked records in two or more tables
- > A Record Set for a table
- > A pair of Record Sets for a table





Entering data

- Data can be entered directly in any Core table, or "on the fly" from any table lower in the taxonomic or place hierarchy.
- We will now take a look at the Input Screens for the four principal Core Tables ("SSC & L"):
 - > Specimen
 - Species
 - Collection
 - ➤ Locality





| Specimen Record | |
|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| General Determination Preparation Images Aux Fields Notes Ref | s |
| Specimen Code JLL14400 Assign Species Code | Record Number 1 of 1 Created Oct 23, 1992 Last changed Changed By |
| sphbuxi Assign Look Up Classification Genus Sphyrospermum Genus Sphyrospermum Show Species Record | Specimen Custom 1 |
| Genus Sphyrospermum Species buxifolium P. & E. Family Ericaceae | Specimen Custom 2 |
| Collection Code | Abundance |
| Collection Data Coll. By J.L. Luteyn Show Collection Record | This Specimen record |
| Date Apr 4, 1992 Locality Latacunga-Quevedo rd. | Save |
| Stage/Sex Storage | Print Carry Delete Cancel |
| Medium Deposited At FAA NYBG | Navigate records |
| | |





|] Species | Record |
|-------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| Classification Subsp/Names Synonymy Dist/Typ | es Images Aux Fields Notes Refs |
| sphbuxi Sphyrospermum buxifolium P. & E. Species Code sphbuxi Assign | Record Number 1 of 1 Created Last changed Changed By |
| Genus | - Classification |
| Sphyrospermum | Family Ericaceae |
| Specific Name (Specific Epithet) buxifolium | Order Ericales |
| Species Author (& Date) | Show Genus Record |
| P. & E. | |
| Subgenus | Show Specimens (1) This Species record |
| Section | Save |
| | Print Carry |
| Synonymy | Delete Cancel |
| Valid Species Code sphbuxi | Navigate records |
| A valid Species name with no synonyms in the database | |





| | | | Species Re | cord 📃 | | |
|------------------|--------------------------------------|----------|------------|--------|-----------|-------------------------------------------------------------------------|
| Classification | Subsp/Names | Synonymy | Dist/Types | Images | Aux Field | s Notes Refs |
| | um buxifolium P. /ariety, & Commo | | | | | Record Number 1 of 1 Created Last changed Changed By |
| Subspecific Epit | thet | | | | | |
| Subspecies Auth | nor (& Date) | | | | Ο | |
| Variety or Culti | var | | | | | |
| Variety Author | (& Date) | | | | O | |
| Common Name | | | | | | This Species record |
| | | | | | | Print Carry Delete Cancel Navigate records |





| | Species | Record | E |
|----------------------------------------------------------------------------------------|--------------------------------------------------------------------|-------------------------|---------------------------------------------------------------------------------|
| Classification Subsp/Name | s Synonymy Dist/Typ | es 🛛 Images 🗍 Aux Field | ls Notes Refs |
| sphbuxi Sphyrospermum buxifolium The name | P. & E. | | Record Number 1 of 1 Created Last changed Changed By |
| Sphyrospermum buxifol. | ium | P. & E. | Sp. Code: sphbuxi |
| 🗸 Is a valid Species name w | ith the following junior syno | nym in the database: | |
| Genus | Species | Author | Species Code |
| Sphyrospermum | nigrans | Baker | sphyrnigrans |
| Is a junior synonym of Is a valid Species name w Synonymize This Speci | ith no synonyms in the databa es Accept New Sy Cancel New Sy | nonàmă | This Species record Save Print Carry Delete Cancel Navigate records |





| | Species Record 📃 🗧 |
|--------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| Classification Subsp/Names Synonymy | Dist/Types Images Aux Fields Notes Refs |
| sphbuxi Sphyrospermum buxifolium P. & E. | Record Number 1 of 1 Created Last changed Oct 22, 2002 Changed By Administrator |
| Distribution | |
| Ecuadorean highlands and northern highland Peru | |
| Type Locality | |
| Volcan Cotopaxi, Ecuador | |
| Type Depository Museo Nacional de Historia Natural, Quito | This Species record Save |
| Display Specified Types | Print Carry Delete Cancel |
| Display Holotype | |
| Display All Types | Navigate records |





| Collection Record | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|--|--|
| General Host Record Georeference Images Aux Fields Notes Refs | | | |
| Collection Code JLL14400 Assign Locality Code Latacunga Assign Locality Data Locality Latacunga-Quevedo rd. Show Locality Record | Record Number 1 of 1 Created Nov 20, 1993 Last changed Changed By | | |
| State/Prov Cotopaxi Elev. 274-3350m District Lat. 0°58'S Country Ecuador Long. 78°56'W | | | |
| Collected By J.L. Luteyn | Show Specimens (1) | | |
| Date Collected (or Date Started) Date Collection Completed (Optional) Mo: 4Dy: 4Yr: 1992 Mo: 0Dy: 0Yr: 00 Today Collection Method Search Site 3-14km E Pilaló Source Source | This Collection record Save Print Carry Delete Cancel Navigate records | | |
| | | | |





Intelligent date handling

- International or US date format for data entry
- > International, US, or ANSI date format for export
- Complete or partial dates:
 - Day-Month-Year (or Month-Day-Year)
 - Month-Year only
 - Year only
- Mixed full and partial dates for date ranges
- Automatic recording or record creation and revision dates





| Collected By | |
|------------------------------------------|--------------------------------------|
| C. Darwin | |
| Date Collected (or Date Star <u>ted)</u> | Date Collection Completed (Optional) |
| Mo: 9Dy: 30 Yr: 1832 (Today) | Mo: 10 Dy: 3 Yr: 1832 (Today) |

Month only

Collected By J.L. Lutevn

| <u>-</u> | | |
|-----------|-------------------------|-------|
| | d (or Date Stai | |
| Mo: 1 Dv: | 0 <mark>Yr:</mark> 1985 | Today |

Year only

| Collected By | |
|------------------------------------------|--------------------------------------|
| J.L. Luteyn | |
| Date Collected (or Date Star <u>ted)</u> | Date Collection Completed (Optional) |
| Mo: 0Dy: 0Yr: 1984 (Today) | Mo: ODy: OYr: OO (Today) |

Mo:

0 Dv:

Date Collection Completed (Optional) 0 Yr:

00

Today

Record creation and revision dates -Record -Number 129 of 129 Created May 21, 1996 Last changed Oct 22, 2002 Changed By Administrator





"Host-guest" relationships

- Guest" Specimen records can be linked many-toone with "host" Specimen records
- Collection data for hosts and their guests is separately recorded
- Examples: Parasites and hosts, herbivores and plants, DNA and organs, organs and donors
- Multi-level (recursive) host-guest records are supported





| Collection Record | I E |
|--------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| General Host Record Georeference Images Aux Fields Notes Refs | |
| Collection Code: JLL11106H 7-9km NE Pindilíg tow. Rivera, Jan 19, 1985 -Host Specimen Code | Record Number 1 of 1 Created Nov 20, 1993 Last changed Changed By |
| JLL11106 Look Up Host by Species | |
| Host Species Species Siphocampylus scandens Family Campanulaceae | |
| | This Collection record Save |
| | Print Carry Delete Cancel |
| | Navigate records |





| Locality R | ecord 📃 🗧 |
|--------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|
| General Georeference Images Aux Fields Notes | Refs |
| Locality Code | Record Number 1 of 1 Created Last changed Changed By |
| Latacunga-Quevedo rd. | |
| District State/Province Cotopaxi Country Ecuador Elevation (m) 274-3350m | Show Collections (2) This Locality record Save Print Carry |
| | Navigate records |





Georeferenced locality data

- Multiple input/export formats for latitude and longitude
 - Degree/Minutes/Seconds
 - Integer degrees/decimal minutes
 - Decimal degrees (internal format): up to 6 places (1 cm) accuracy
- Alternate coordinate systems (UTM, Lambert, TRS, State Plane, etc.)





| | | | | Loc | alit | y Rec | cord | | ΞE | |
|----------------------------------------------------|---------------------------------------------|----------------------|-----------------|-----------------|------------|-------|-----------------------------------------------------------------------------------------------------|-----------------------|-------------------------|--|
| General Georeference Images Aux Fields Notes Refs | | | | | | | | | | |
| Locality Code: CO-Echo Yalley Echo Yalley Ranch | | | | | | | Record Number 1 of 1 Created Jun 11, 2002 Last changed Jun 11, 2002 Changed By A | | | |
| _ C | Coordinates: Select System | | | | | Г | Alternate Coordinates | | | |
| | _ | | Latitude | Longitude | , | | UTM | | | |
| 1 | ۲ | Degrees | | 105 | | | UTM 0097495 4373 | 583 Zone 14 | | |
| | | Minutes | 22 | 29 | | | TRS | | | |
| | | Seconds | 58 | 13 | | | T8SR72W12SP,C0 | | | |
| | | | N 🖲 S 🔿 | E () W 🖲 | | | State Plane | | | |
| | _ | | Latitude | Longitude | , | | State Plane 2003678 | 5 00564341 CO Central | ר – | |
| 2 | 0 | Integer Degrees | 39 | -105 | | L | | | | |
| | | Decimal Minutes | | 29.2160 | | | | | | |
| | | S and W Hemisphe | - | - | | | | This Locality record | | |
| 3 | 0 | Desired Degrees | Latitude | Longitude | a | | | Save | 느 | |
| | 0 | Decimal Degrees | 39.38278 | -105.48694 | <u>+</u>] | | | Print Carr | $\overline{\mathbf{v}}$ | |
| _ | S and W Hemispheres: Enter negative Degrees | | | | | | | | | |
| | Accuracy 1 second | | | | | | | Delete Canc | el) | |
| | Clear Coordinates | | | | | | | Navigate records | | |
| Se | t cooi | rdinate output dispi | ayı in Preferei | nces (Special , | ment | Ì | | | | |





| Specimen & Collection Input | | | | | | | | | | |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|--|--|--|--|
| Specimen Collection Determination Preparation Images Aux Fields Notes Refs | | | | | | | | | | |
| Specimen Code SPM1125 Assign Species Code Cavcuat Assign Look Up Classification Genus Cavendishia Show Species Record Species cuatrecasasii? Family Ericaceae Collection Code (assigned automatically) SPM1125 Input Collection Data Collection Data Coll. By R. Colwell Date Locality Cerro de la Muerte, La Georgina | Record Number 0 of 0 Created Oct 23, 2002 Last changed Oct 23, 2002 Changed By Administrator Specimen Custom 1 Specimen Custom 2 Type Status Abundance 1 This Specimen record Save Print | | | | | | | | | |
| Stage/Sex Storage Pupa Image Medium Deposited At Image Image | Cancel Navigate records | | | | | | | | | |





Tools common to Species, Specimen, Collection and Locality tables: References

- Relational literature reference system
 - Reference table accommodates journal articles, books, book sections, and online resources.
 - ➤ "Go to URL" button for any reference.
 - Link any number of Reference records with any number of SSC or L records.
 - > Enter References directly or from linked SSC or L records.
 - Display all linked SSC or L records for a given Reference or all References for a given SSC or L record.
 - Import References directly from EndNote and other reference managers (tab-delimited text).





| 1 | Reference Records | |
|-----------|----------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------|
| Reference | Links | |
| | Reference Number 573 Assign Journal Article | Record Number 24 of 44 Created May 2, 2002 |
| Author | J. Adis | Last changed Oct 22, 2002 Changed By Administrator |
| Year | 1987 | |
| Title | Extraction of arthropods from neotropical soils with a modified Kempson apparatus | |
| Journal | Journal of Tropical Ecology | |
| Volume | 3 Pages 131-138 Go To URL | |
| URL | http://links.jstor.org/sici?sici=0266-4674%28198705%293% | This Reference record Save |
| | eference | Print Carry |
| | is. 1987. Extraction of arthropods from neotropical soils with a fied Kempson apparatus. Journal of Tropical Ecology 3: 131–138. | Delete Cancel |
| | | |





| Reference Records | | | | | | | |
|--------------------|----------------------|-----------------------------------------------------------------------------------------------------------------|-----------------------------|--|--|--|--|
| eference Links (3) | | | | | | | |
| Refere 573 | nce Number Assign | Journal Article Number 24 of 44 Created May 2, 2002 Last changed Oct 22, 20 Changed By Administrate | | | | | |
| Table | Record Code | Record Content | | | | | |
| Collection | JLL13339H | J.L. Luteyn, Nov 15, 1989, Nono-Pto. Quito Rd. | | | | | |
| Specimen | JLL12414:04 | Rhinoseius richardsoni Hunter 1972; May 22, 1988, 25 km N Yar | rumal | | | | |
| | | | V | | | | |
| | | n neotropical soils with a | d Save Carry ancel | | | | |
| | | | | | | | |





| | | Specimen Records | |
|---------------------------------------------------------------------------------------------------------------------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| General Determination Prep | aratio | n Images Aux Fields Notes Refs (3) | |
| Specimen Code: JLL12414:04 Rhinoseius richardsoni Hunter 1972 Last changed Oct 22, 2 Changed By Administra | | | er 1 of 193 d Nov 20, 1993 hanged Oct 22, 2002 |
| References linked to this Specim Ref No Author | en (clio Year | k to display full text) ———————————————————————————————————— | |
| Link a Ref New Ref | 1987 1964 1970 | Extraction of arthropods from neotropical soils with a m New blattisociid mites (Acarina : Mesostigmata) recover The nasal mites of Cuban birds. I. Ascidae , Ereynetidae , Umbook West Edit West This S | red from Neotropical flo , Trombiculidae (Acarir specimen record Save int Carry |





Tools common to Species, Specimen, Collection and Locality tables: Images

- Image management system: Input
 - Link any number of Image records to each SSC or L record.
 - Enter images from files, the clipboard, or directly from TWAIN devices (scanners, digital cameras).
 - Create a thumbnail in the Biota Data File, linked to a full image file on disk, or import a full image to Biota.





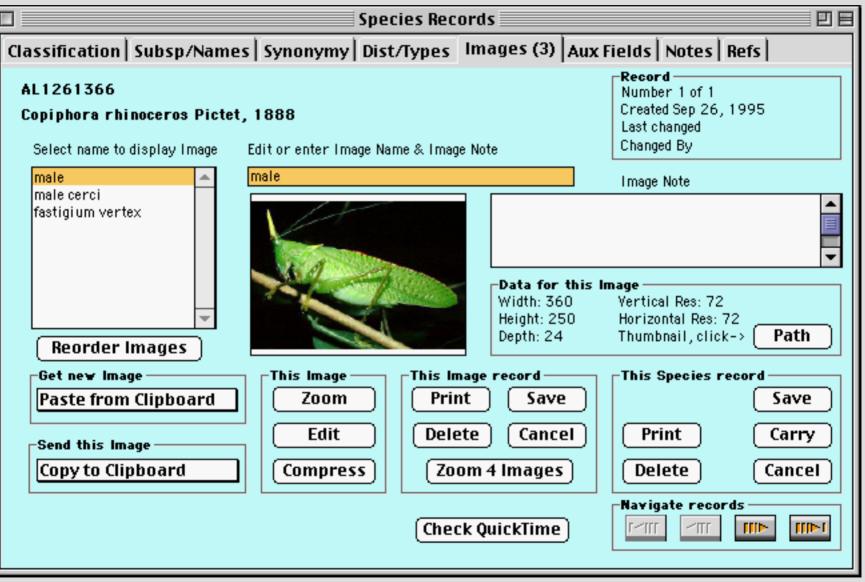






Image management system: Editing

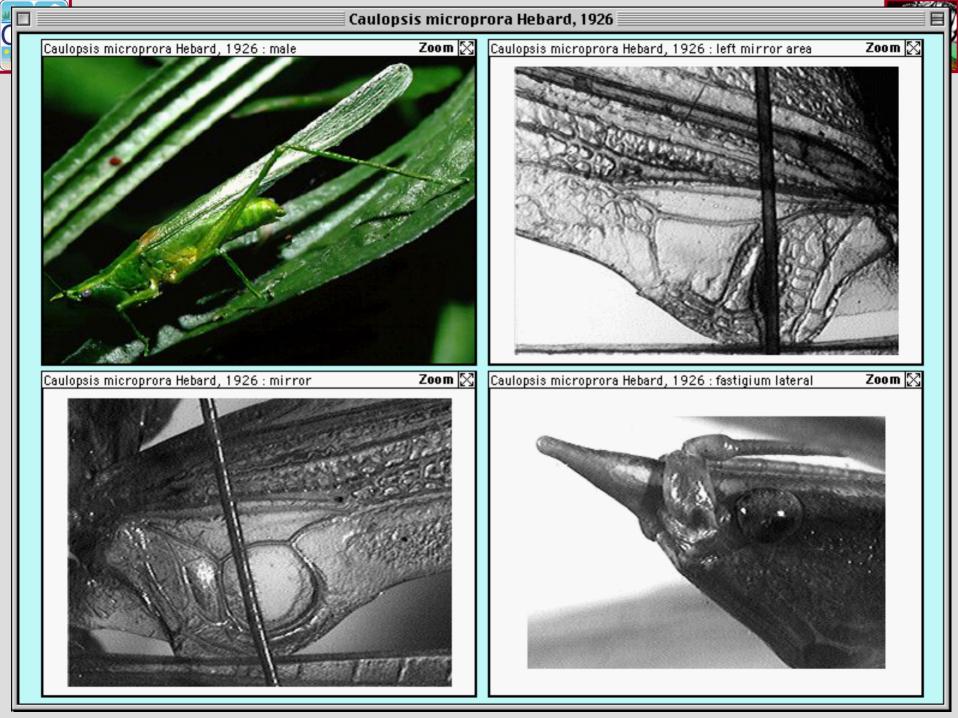
- Use Biota's onboard Image Editor to crop, enlarge, or apply Photoshop-style filters to images.
- Link, import, or export images in any of 10 QuickTime image formats (including JPEG,TIFF, BMP, & Photoshop), or transform from one format to another.
- Compress image files from within Biota, using any of 14 QuickTime compression codecs.

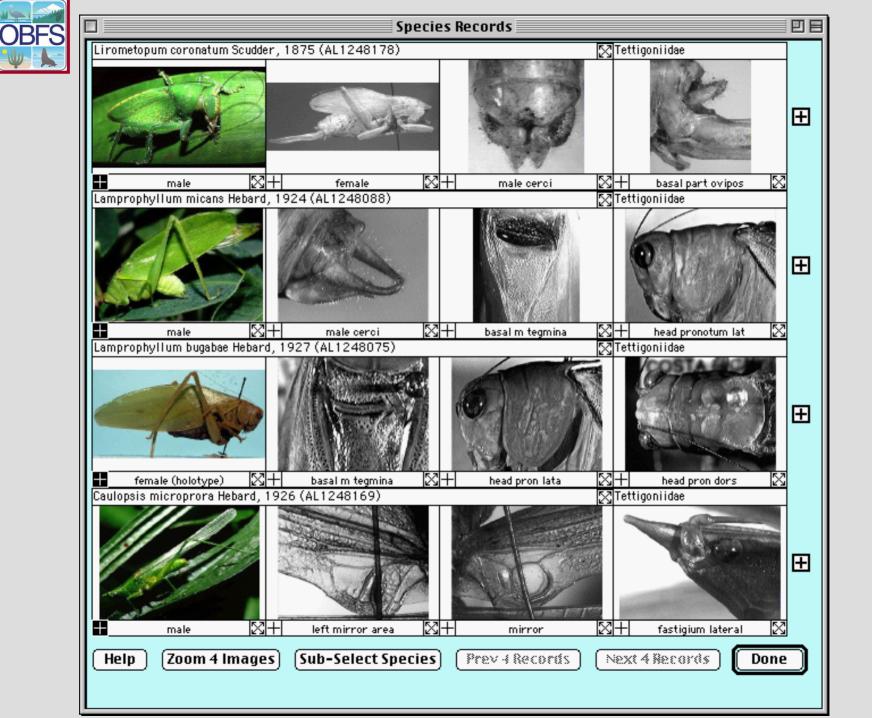




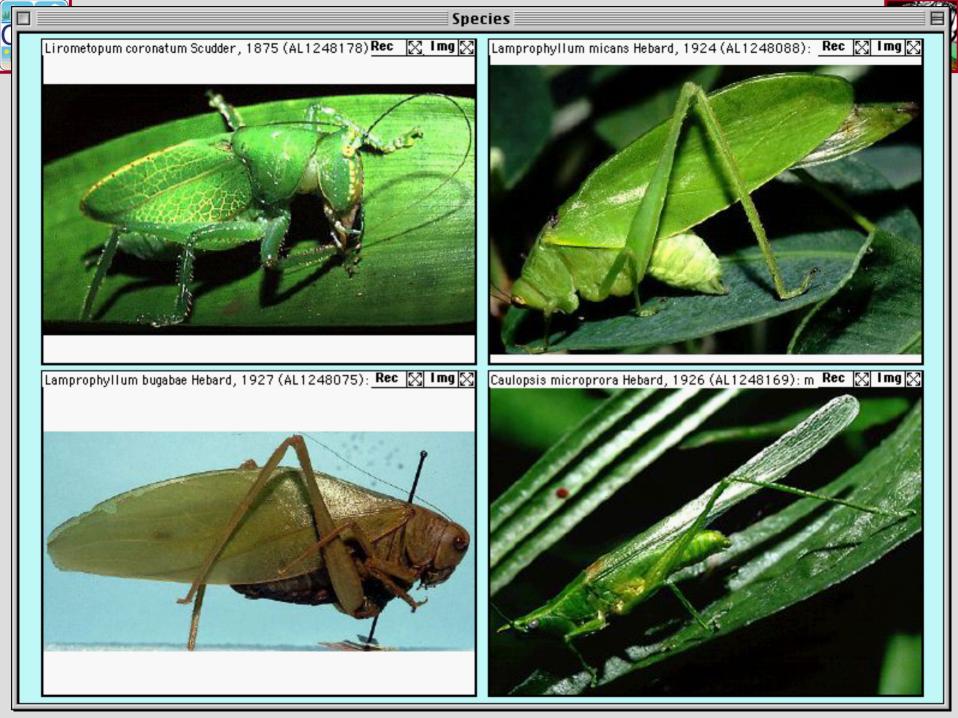
Image management system: Comparison

- > Use the Zoom button to display a full image from disk.
- Input screens: Compare up to 4 images linked to the same record.
- Listing screens: Compare up to 4 images for any selection of records.













Tools common to Species, Specimen, Collection and Locality tables: Notes

- Notes
 - Link any number of Notes records to each Species, Specimen, Collection, Locality or Loan record.
 - Note Records, like all other alphanumeric records, are searchable and exportable.





| | Collection Record | | | | | |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|
| General Host Record Georeference | Images Aux Fields Notes (2) Refs | | | | | |
| Collection Code: JLL14708H Yilcabamba-Yalladoli. Oct 23. 1992 Last changed Changed By | | | | | | |
| Collection Notes Click a note below to display its full to | ext | | | | | |
| Oct 23, 1992 J.L. Luteyn Steep slopes, montane forest. Oct 5, 1994 RKC This is the Host Plant Collection record for mite specimens. | | | | | | |
| Note By Note J.L. Luteyn 🐼 Mo: 1 Steep slopes, montane forest. | Date ODy: 23 Yr 1992 New Note Save Note Delete Note Mavigate records This Collection record Save Print Carry Delete Cancel | | | | | |





Customizing Biota: Projects and Auxiliary Fields

- Define and name any number of additional fields (Auxiliary Fields, each 80 characters in length) for SSC or L tables.
- Define any number of Projects within a Data File, each with its own set of Aux Fields.
- Each Aux Field can belong to just one Project or be shared by many Projects.
- Compare Aux Field data for any selection of records in matrix format.





| | Project Records | |
|-----------------------------------------|------------------------------------------|---------|
| Double Click a Line to Vie v | or Modify a Record 3 | Records |
| Project Short Name | Project Name | Active? |
| Global Project | Global Project | |
| Luteyn Mites | Luteyn Mite Collections | |
| Useful Plants of Rio Blanco | Useful Plants of Rio Blanco | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | Add Record Sort Print | |
| | (Delete Selection) (Sub-Selection) (Done | |
| | | ▲ ▶ |





| 🛛 🛛 Project Records 📃 🖻 | | | | | | | | |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|--|
| General Auxiliary Field Set | | | | | | | | |
| Select a Table from the Popup List | Number 5015 | | | | | | | |
| Species Species Auxiliary Field Names for the Project: Useful Plants of Rio Blanco Created Oct 22, 2002 Last changed Oct 22, 2002 Changed By Administrator | | | | | | | | |
| Global List of Field Names | Field Names for this Project | | | | | | | |
| 1 anal shield 2 coxa IV spur 3 dorsal shield 4 exopodal plates 5 genital setae 6 genital setae 7 metapodal plates 8 opisthoventral setae 9 peritrematic plates 10 podonotal setae 11 setae z1 12 oral shield 13 house construction 14 thatch 15 timber 16 medicine 17 fiber 18 arrow poison 20 food | | Sort Global Fields By Number Name Edit Project Field Names Show Projects for a Field Help This Project record Save Print Carry Delete Cancel Navigate records Mavigate records | | | | | | |
| | | | | | | | | |

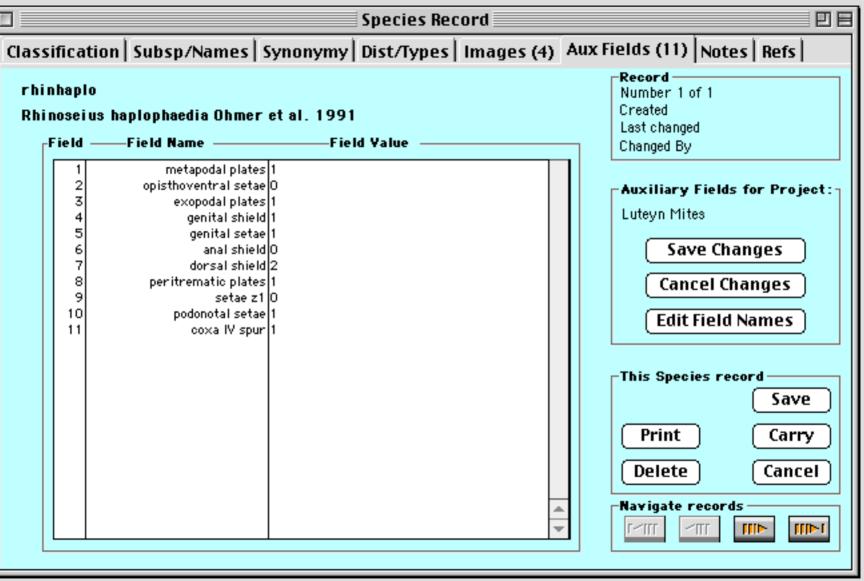




| General Auxiliary Field Set Select a Table from the Popup List Species Species Auxiliary Field Names for the Project: Luteyn Mite Collections Global List of Field Names Field Names for this Project 1 anal shield 2 Coxa IV spur 3 2 coxa IV spur 3 Field Names for this Project 1 anal shield 2 2 Sort Global Fields By 3 dorsal shield 4 2 Sort Global Fields By 4 exopodal plates 5 genital setae 6 genital shield 7 Thereadol plates 5 8 opisthoventral setae 9 peritrematic plates 11 Show Projects for a Field 12 oral shield 13 house construction 14 Show Projects for a Field 14 metopoint plates 11 setae z1 Show Project record 11 setae z1 Save Print Carry 11 setae z1 Save Print Carry 12 oral shield 13 arrow poison to coat All >>> C Navigate records 13 arrow poison to coat All >>> C Record Navigate records 13 <td< th=""><th colspan="8">🛛 🛛 Project Records 📃 🗉</th></td<> | 🛛 🛛 Project Records 📃 🗉 | | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--|--|--|--|--|
| Select a Table from the Popup List Species Species Auxiliary Field Names for the Project: Luteyn Mite Collections Global List of Field Names Image: Species Auxiliary Field Names for this Project 1 anal shield 2 ooxal V spur 3 dorsal shield 4 exopodal plates 5 genital state 6 genital state 7 metapodal plates 9 peritrematic plates 10 podonotal state 9 peritrematic plates 10 setae z1 11 setae z1 12 oral shield 13 house construction 14 timber 15 timber 16 medicine 17 fiber 18 resins 19 arrow poison 20 fiber 21 fiber 22 fiber 10 state z1 11 setae z1 12 metapodal plates 23 retae z1 </th <th colspan="8">General Auxiliary Field Set</th> | General Auxiliary Field Set | | | | | | | |
| Global List of Field Names 1 anal shield 2 coxa IV spur 3 dorsal shield 4 exopodal plates 5 genital setae 6 genital shield 7 metapodal plates 8 opisthoventral setae 9 peritrematic plates 9 peritrematic plates 9 peritrematic plates 10 podonotal setae 11 coxa IV spur 12 oral shield 14 timber 15 timber 16 medicine 17 fiber 18 resins 20 food 20 food 20 food 20 food | Select a Table from the Popup List Number 2 of 3 Species Species Auxiliary Field Names for the Project: Luteyn Mite Collections Number 2 of 3 Species Species Auxiliary Field Names for the Project: Luteyn Mite Collections Number 2 of 3 | | | | | | | |
| 2 coxa IV spur 3 dorsal shield 4 exopodal plates 5 genital setae 6 genital setae 6 genital setae 6 genital setae 9 peritrematic plates 9 peritrematic plates 10 podonotal setae 9 peritrematic plates 10 podonotal setae 11 setae 21 12 oral shield 13 house construction 14 timber 15 timber 16 medicine 17 fiber 18 resins 19 arrow poison 20 food 21 food 22 stae zt 3 metapodal plates 4 exopodal plates 10 podonotal setae 11 setae zt 11 setae zt 12 food 13 house construction 19 arrow po | Global List of Field Names | Field Names for this Project | | | | | | |
| | 2 coxa IV spur 3 dorsal shield 4 exopodal plates 5 genital shield 6 genital shield 7 metapodal plates 8 opisthoventral setae 9 peritrematic plates 10 podonotal setae 11 setae z1 12 oral shield 13 house construction 14 thatch 15 timber 16 medicine 17 fiber 18 resins 19 arrow poison 20 food | 2 coxa IV spur 3 dorsal shield 4 exopodal plates 5 genital setae 6 genital shield 7 metapodal plates 8 opisthoventral setae 9 peritrematic plates 10 podonotal setae 11 coxa IV spur 11 setae z1 | Number Name Edit Project Field Names Show Projects for a Field Help This Project record Save Print Carry Delete Navigate records | | | | | |











| | | Species | s Records | | U B | | | |
|---------------------------------------------------------------------------------------------|-----------------------------------------------|-------------------------------------------------|-----------|--|---------|--|--|--|
| Double Click a Field Record (Row) to Display its Values For All Selected Species Records | | | | | | | | |
| Species | <i>Rhinoseius richardsoni</i> rhinrich | <i>Rhinoseius haoloohaedia</i> rhinhaplo | | | | | | |
| 1 anal shield | 0 | 0 | | | | | | |
| 2 coxa IV spur | 1 | 1 | | | | | | |
| 3 dorsal shield | 2 | 2 | | | | | | |
| 4 exopodal plates | 1 | 1 | | | | | | |
| 5 genital setae | 1 | 1 | | | | | | |
| 6 genital shield | 1 | 1 | | | | | | |
| 7 metapodal plates | 1 | 1 | | | | | | |
| 8 opisthoventral se | 1 | 0 | | | | | | |
| 9 peritrematic plat | 1 | 1 | | | | | | |
| 10 podonotal setae | 1 | 1 | | | | | | |
| | Print Core Fields Done | | | | | | | |
| | | | | | ▲ ▶ /// | | | |





Special tools for inventories

- Support for automated entry of collecting data and specimen determinations
- ✤ A system for recording partial determinations
- Automatic recording and updating of determination histories
- Software tools for handling barcodes



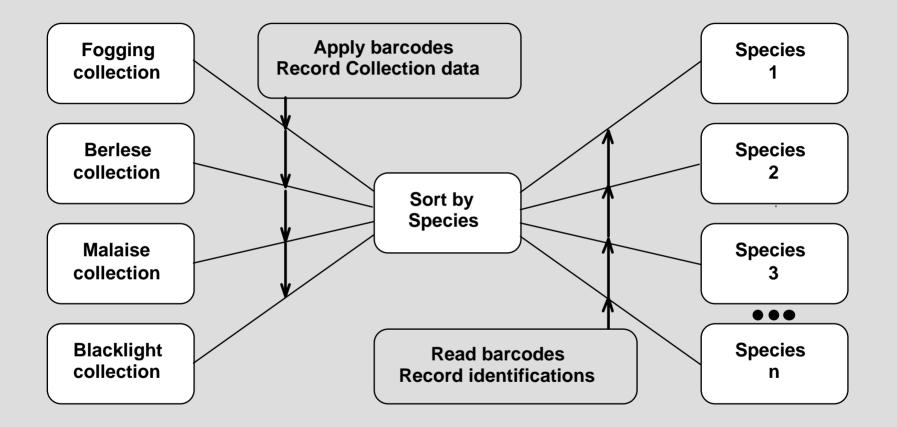


Automated entry of collecting data and specimen determinations

- Rapid input of new records for specimens that share collection data
- Rapid addition of identifications for specimens that share determination data











| | Input Specimen Series | | | | | | |
|---------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|---------------------------------------------------------------------------------------------|--|--|--|--|--|
| Primary Fields Other Fields | | | | | | | |
| Specimen Code Series First Specimen Code Last Specimen Code XYZMHNH1234 XYZMHNH1255 | | | | | | | |
| Collection Code | | | | | | | |
| JLL14787H | Assign Look Up Collection | Show Collection Record | | | | | |
| Coll. By J.L. Luteyn | Date Nov 17, 1992 | Locality Calacalí-Nanegalito Rd. | | | | | |
| | | | | | | | |
| Prepared By J.L. Luteyn Date Prepared Mo: 10Dy: 22 Yr: 2002 Today | Stage/Sex Adult female Medium Hoyer's Storage Box 776 | Records Created onRecord SeriesOct 22, 2002SaveNext Integer Counter ValueCarry1124Cancel | | | | | |
| | | | | | | | |





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Specimen Records

Double Click a Specimen to View or Modify Record

22 Records

| | | | | | Var Field 1 | Var Field 2 | | | |
|---------------------------------------------|-------|---------|-----------------|-------------|--------------|-------------|--------------|-----------|-----|
| Specimen Code | Genus | Species | Collection Code | Collector | Loc. Code | Stage/Sex | Host Storage | Deposited | Aux |
| XYZMHNH1234 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1235 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1236 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1237 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1238 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1239 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1240 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1241 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1242 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1243 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1244 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1245 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1246 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1247 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1248 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1249 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1250 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1251 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1252 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1253 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1254 | | | | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| XYZMHNH1255 | | | JLL14787H | J.L. Luteyn | Calacalí-Nan | Adult femal | JLL1 Box 776 | | 0 |
| | | | | | | | | | |
| | | | | | | 1 | | | |
| Change Var Fields Add New Series Sort Print | | | | | | | | | |
| | | | | | | | | | |
| Delete Selection Sub-Selection Done | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | | |
| | | | | | | | | •• | |





| | Find & Identify Specimen Se | ries |
|----------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|
| Primary Fields Other Fields | | |
| -Enter Specimen Codes to be Found - | Any Specimen Code JLL12414:04 | Last Code found XYZMHNH1246 |
| O In consecutive order (by integer counter) | First Specimen Code La | st Specimen Code Prefix |
| O Use the Specimen Record S | iet | |
| Species Code to be Entered in Speci | imen Records Found ssign Look Up Species | Show Species Record |
| Genus Rhinoseius S | Species haplophaedia | Family Ascidae |
| Other Data to be Entered in Specime Last Determined by E. Lindquist Date Last Determined Mo: 10Dy: 22 Yr: 2002 Today | en Records Found Stage/Sex Medium Storage | Individual Records Auto Carry is ON. Click the "Auto Carry" button to turn it off. Auto Carry Auto Carry Help Done |





A system for recording partial determinations

- Partial identifications (ID's above the species level) are important data
- Linking Specimen records with higher taxa:
 - An undetermined ant is recorded as Genus (Formicidae), Species (Formicidae), Family Formicidae
 - Temporary taxon (parenthetical) records can be generated automatically from input or import





Automatic recording and updating of determination histories

- Biota can record all stages of identification, from partial to definitive determination.
- Determination history records are updated automatically:
 - > By whom changed
 - Date changed
 - > Where changed: specimen, species, genus





| Specimen Record 🛛 🛛 | | | | | | | | |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|----------------|------------|---------------|--------------|-------------|--------------|---------------|
| General Determination Preparation Images Aux Fields Notes Refs | | | | | | | | |
| Specimen Code: JLL14712 Cavendishiana sleumerianella A.C. Smith Determination History records listed newest to oldest, current record first | | | | | | | | |
| Historical Da | | | | | | Record Cha | - | |
| Species Code | Genus | Species | Sp. Author | Determined By | Date Detrmd. | Where | Date | By Whom |
| macsleu | Cavendishiana | sleumerianella | A.C. Smith | R. Colwell | Oct 22, 2002 | ← Curr | ent Record | |
| macsleu | Macleania | sleumerianella | A.C. Smith | R. Colwell | Oct 22, 2002 | Genus Rec | Oct 22, 2002 | Administrat 📃 |
| macsleu | Macleania | sleumeriana | A.C. Smith | R. Colwell | Oct 22, 2002 | Species Rec | Oct 22, 2002 | Administrat |
| macpube | Macleania | puberula | Bentham | J.L. Luteyn | Oct 24, 1992 | Spom Rec | Oct 22, 2002 | Administrat |
| | | | | | | | | |
| | | | | | | | | ▲ |
| | | | | | | | | - |
| Double Click a Record for Longer Fields Last Determined by R. Colwell Date Last Determined Mo: 10 Dy: 22 Yr: 2002 Today Today Today | | | | | | | | |



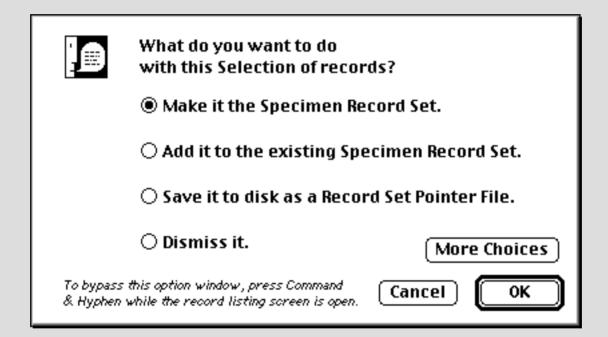


Set operations for working with Record Sets

- Assignment of records to a Set
- Reduction of a Set to a Subset
- Union of two Sets (in either A or B)
- Difference between two Sets (in A but not in B)
- Intersection of two Sets (shared records)
- Intersection complement (unshared records)
- Saving Record Set pointers to a disk file

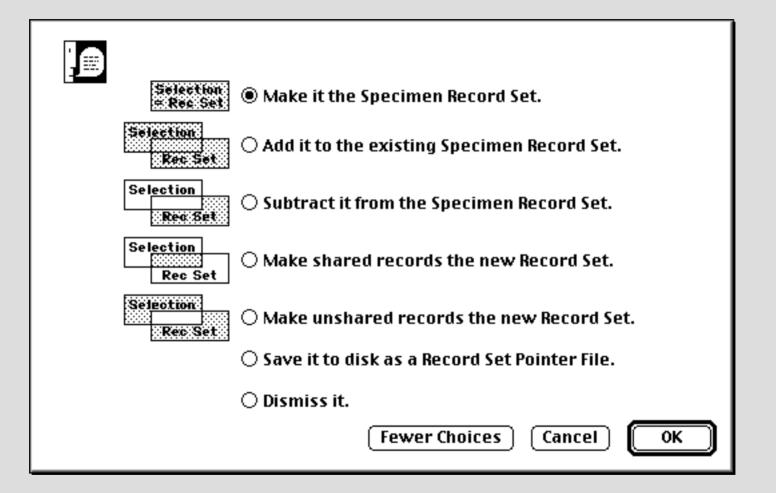
















Tools for queries and data retrieval

- Ad-hoc searches based on record content
- Finding child records and the parent record
- Place-by-taxon and taxon-by-place queries: the real payoff for relational design





| Query | | | | | | |
|-------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|-------------------|----------------------------------------------------------------------------------------------------------|---|--|
| 🔯 r• | Query Editor | | | | | |
| | | CollectedBy | is equal to | C. Darwin | | |
| | And | [Locality]Country | is equal to | Chile | | |
| | Or | [Locality]Country | is equal to | Ecuador | | |
| | Related | ble Fields: d Tables Alternate Coordina ⁶ AuxiliaryFields | ↓ ate 3 | Comparisons : is equal to is not equal to is greater than is greater than or equal to | | |
| | | Country | | is less than is less than or equal to | | |
| | | District | | contains | | |
| | | Elevation (m) | - | does not contain | - | |
| | Value Ecuador And Or Except Clear All Del Line Insert Line Save Load Cancel Query in selection | | | | | |

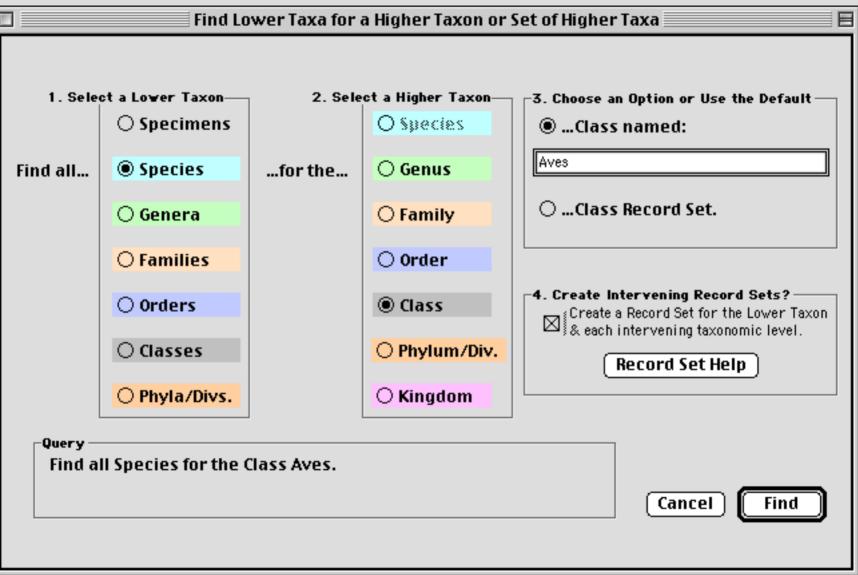




| 🗌 📃 🛛 🖓 Family Records | | | | | | |
|-----------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|--|--|--|--|--|
| Family | Family Custom 1 | | | | | |
| Ericaceae | | | | | | |
| Superfamily | Family Custom 2 | | | | | |
| Suborder | Family Custom 3 | | | | | |
| Order | | | | | | |
| Ericales | | | | | | |
| Classification Superorder Subclass Class Dicotyledoneae Show Genera (24) | This Family record Save Print Carry Delete Cancel Navigate records | | | | | |
| Show Order | | | | | | |
| | | | | | | |

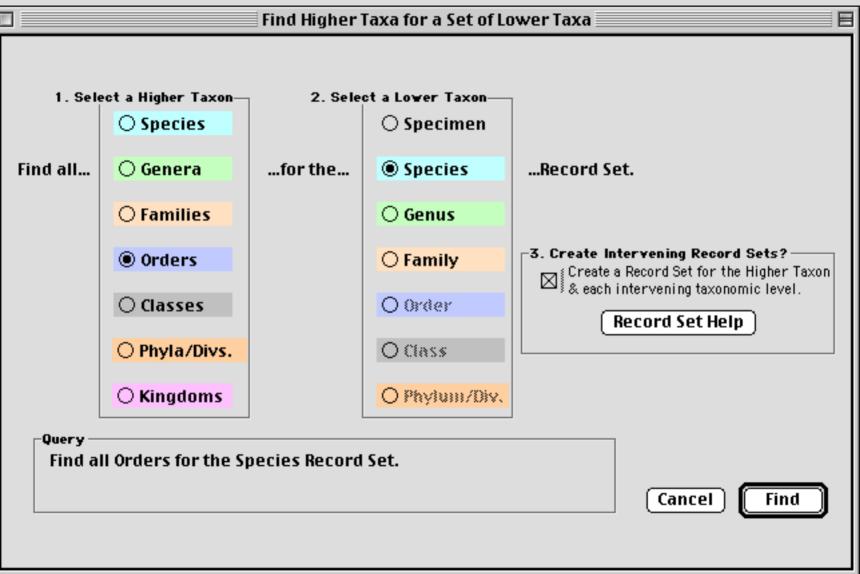






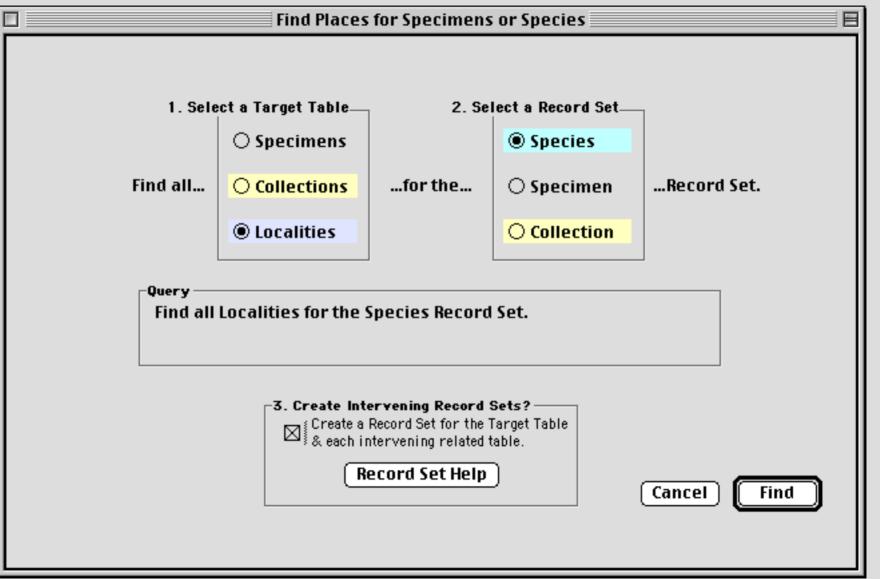






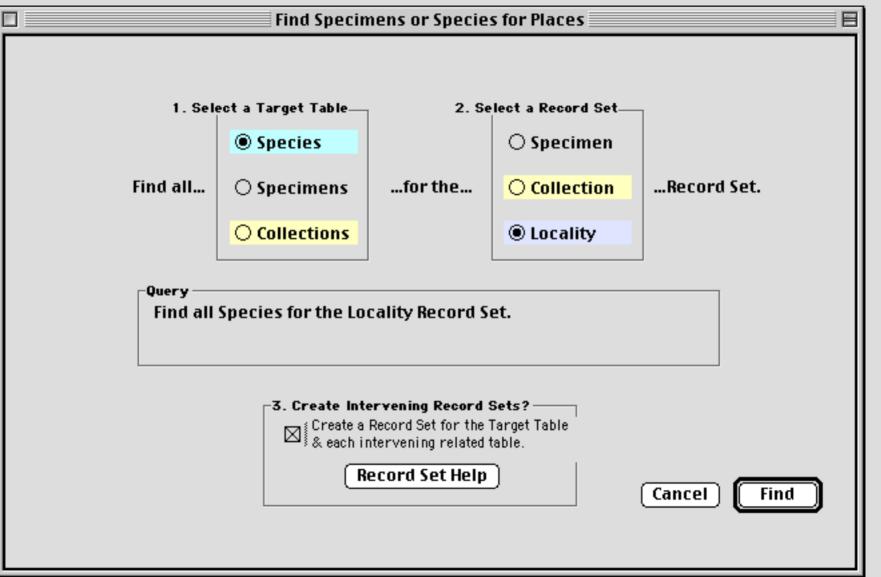














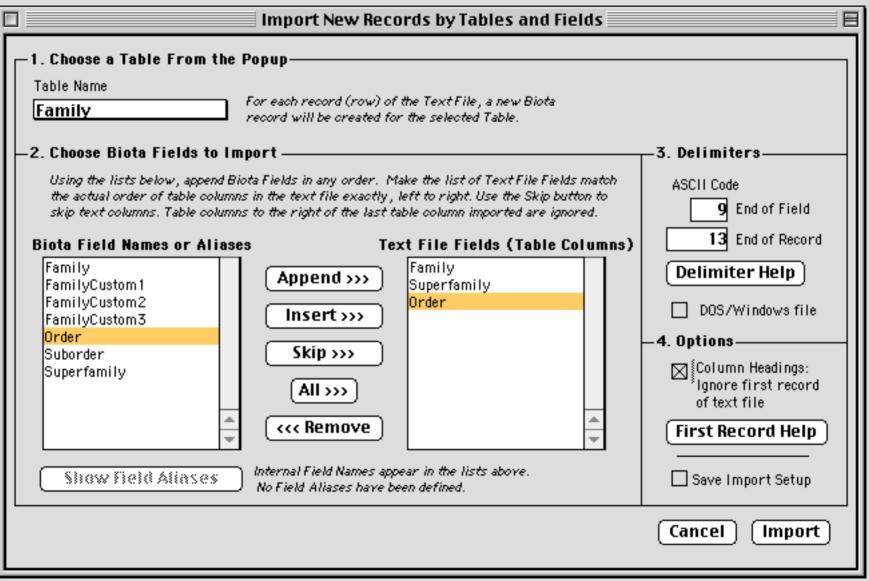


Tools for importing text and images

- Importing by tables and fields from a delimited text file
 - > New records
 - > Updating existing records
 - Merging records from two Biota data files
- Importing images in batch mode
 - Relies on a text file containing a table of
 - Image filenames
 - Parent table for each Image
 - Parent Record Code for each Image











| Import Images 📃 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| This tool imports Images automatically from a list of image disk files to create Image Records in the Biota Data File. (Click the Help button below for details.) —1. Choose a strategy — |
| Import a thumbnail image to the Biota Data File, with a link to the image file. Import the image itself into the Biota Data File2. Find the Folder containing the image files to be imported |
| Find the Image Folder -3. Open the list of Image Files |
| Open the Image File List Image Import Help Cancel OK |



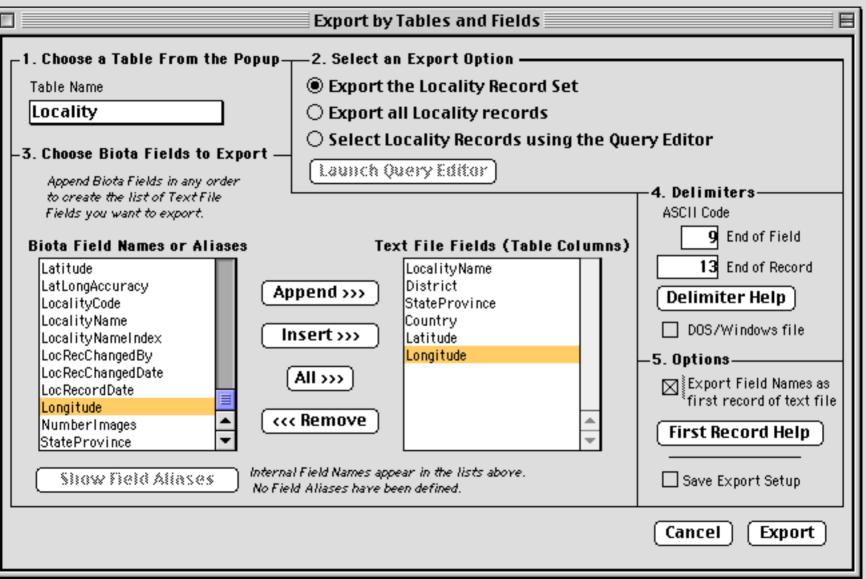


Tools for exporting text and images

- Exporting by tables and field to a delimited text file
- Exporting images in batch mode
 - > Writes a log file containing a table of
 - Image filenames
 - Parent table for each Image
 - Parent Record Code for each Image
 - The same images can be imported in batch mode to a different Biota Data File, using the log file.











| | Export Image | 25 |
|-----------------------------------------------|-------------------------------------|-----------------------------------------------------------------|
| Create image file — 1. Choose a strategy – | s on disk for the Specimen | Record Set, including: |
| All images for | each Specimen record in the Sp | ecimen Record Set. |
| 🔿 Only the first in | nage for each Specimen record | l in the Specimen Record Set. |
| —2. Specify the ∨hich i | mages to export | |
| Export full ima | ges and thumbnails. | |
| \bigcirc Export full ima | ges only; skip thumbnails. | |
| —3. Choose the Image fo | rmat and find or create the destina | ation folder |
| JPEG | Set Fo | Dider Colibri:!!!Biota Development: Biota2b20ab:BiotaImages: |
| Image Export He | 2lp | Cancel OK |





Special export tools 1

- Specimen flatfiles (any field in the database for any set of Specimen records)
- Taxonomic flatfiles (higher classification for any set of Specimen records)
- Custom flatfiles based on any table
- Notes, Auxiliary Fields, formatted References





Special export tools 2

For systematists:

Near-publication-ready "Specimens Examined" or "Exsiccatae" text for any set of Specimen records

NEXUS formatted Auxiliary Field matrices

- For ecologists: Collection x Taxon and Locality x Taxon tables
 - Incidence or abundance tables for any taxonomic rank
 - > Option: EstimateS input or Cornell Condensed Format



| Export Localities by FamilyTable for |
|----------------------------------------------------------------------------------------------|
| The Locality Record Set. |
| O The Collection Record Set. |
| O The Specimen Record Set. |
| O The Family Record Set. |
| O The Family & Locality Record Sets |
| ● Use incidence (presence/absence) data. |
| Use abundance data (number of individuals per species per locality). |
| 🔲 Interrupt to flag zero Abundances. |
| Format Options Export in EstimateS format. EstimateS Help |
| Export in Cornell Condensed Format. Cornell Help |
| Other Options |
| 🔲 Interrupt to flag orphan Specimens. |
| Include Localities with no Specimens. |
| Include Families with no Specimens. |
| Cancel OK |







Database maintenance tools

Database integrity

- Automatic parent record creation
- One-step updates of child record linking fields
- Deletion control for parent records
- > Orphan and childless record finders
- Database security
 - Multi-level password/privilege system
 - Data File password protection





Customizing Biota: Re-naming Core Fields

- Many fields in the Core Tables can be re-named to suit your needs.
- These "Field Aliases" appear throughout the database and on reports and labels.





| Internal Field NameLong AliasShort Alias[Specimen]StageSexStage/SexStage/Sex[Specimen]MediumMediumMedium[Specimen]StorageStorageStorage[Specimen]DepositedDeposited AtDeposited[Specimen]TypeStatusType StatusType Status[Specimen]SpecimenCustom1Specimen Custom 1Specm Cust 1[Specimen]SpecimenCustom2Specimen Custom 2Specm Cust 2[Collection]SiteSlope and aspectSlope and aspect[Collection]MethodCollection MethodMethod[Locality]LocalityNameLocality NameLocality Name[Locality]StateProvinceState/ProvinceState/Prov[Locality]CountryCountryCountry |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| [Specimen]MediumMediumMedium[Specimen]StorageStorageStorage[Specimen]DepositedDeposited AtDeposited[Specimen]TypeStatusType StatusType Status[Specimen]SpecimenCustom1Specimen Custom 1Spcm Cust 1[Specimen]SpecimenCustom2Specimen Custom 2Spcm Cust 2[Collection]SiteSlope and aspectSlope and aspect[Collection]SourceSourceSource[Collection]MethodCollection MethodMethod[Locality]LocalityNameLocality NameLocality Name[Locality]StateProvinceState/ProvinceState/Prov |
| [Specimen]DepositedDeposited AtDeposited[Specimen]TypeStatusType StatusType Status[Specimen]SpecimenCustom1Specimen Custom 1Spcm Cust 1[Specimen]SpecimenCustom2Specimen Custom 2Spcm Cust 2[Collection]SiteSlope and aspectSlope and aspect[Collection]SourceSourceSource[Collection]MethodCollection MethodMethod[Locality]LocalityNameLocality NameLocality Name[Locality]StateProvinceState/ProvinceState/Prov |
| [Specimen]DepositedDeposited AtDeposited[Specimen]TypeStatusType StatusType Status[Specimen]SpecimenCustom1Specimen Custom 1Spcm Cust 1[Specimen]SpecimenCustom2Specimen Custom 2Spcm Cust 2[Collection]SiteSlope and aspectSlope and aspect[Collection]SourceSourceSource[Collection]MethodCollection MethodMethod[Locality]LocalityNameLocality NameLocality Name[Locality]StateProvinceState/ProvinceState/Prov |
| [Specimen]SpecimenCustom1Specimen Custom1Spcm Cust 1[Specimen]SpecimenCustom2Specimen Custom 2Spcm Cust 2[Collection]SiteSlope and aspectSlope and aspect[Collection]SourceSourceSource[Collection]MethodCollection MethodMethod[Locality]LocalityNameLocality NameLocality Name[Locality]StateProvinceState/ProvinceState/Prov |
| [Specimen]SpecimenCustom2Specimen Custom2SpecimenCust 2[Collection]SiteSlope and aspectSlope and aspect[Collection]SourceSourceSource[Collection]MethodCollection MethodMethod[Locality]LocalityNameLocality NameLocality Name[Locality]DistrictDistrictDistrict[Locality]StateProvinceState/ProvinceState/Prov |
| [Collection]SiteSlope and aspectSlope and aspect[Collection]SourceSourceSource[Collection]MethodCollection MethodMethod[Locality]LocalityNameLocality NameLocality Name[Locality]DistrictDistrictDistrict[Locality]StateProvinceState/Prov |
| [Collection]Source Source Source [Collection]Method Collection Method Method [Locality]LocalityName Locality Name Locality Name [Locality]District District District [Locality]StateProvince State/Prov |
| [Collection]Method Collection Method Method [Locality]LocalityName Locality Name Locality Name [Locality]District District District [Locality]StateProvince State/Prov |
| [Locality]LocalityName LocalityName LocalityName [Locality]District District District [Locality]StateProvince State/Prov |
| [Locality]District District District [Locality]StateProvince State/Prov |
| [Locality]StateProvince State/Province State/Prov |
| . ,. |
| [[Locality]Country Country Country |
| |
| ises for the selected Field Name (Be sure to set both a Long and a Short version) – Internal Field Name Long Alias Short Alias |
| [Collection]Site Slope and aspect Slope and aspect |
| (Cannot be edited) (25-30 characters maximum) (13-15 characters maximu |
| |





Customizing Biota: Automatic generation of Record Codes

- Applies to the Species, Specimens, Collections, and Localities tables.
- Alphanumeric prefix can match barcode prefixes.
- Full control over format of Record Codes.







| | | Record Code Setting | js | | |
|------------------|-------------------------------|----------------------------------|---------------------|-------------------------|-------------------------------|
| Assignment F | Recognition | | | | |
| _Default Prefixe | es and Integer Counters for a | assigning new Record Co | odes ——— | | |
| | Alphanumeric Prefix | Next value of Integer Counter | Number of digits | User-Defined Counter | Assign Code without asking |
| Specimen Codes | SPM | 0000 | 4 | \boxtimes | |
| Species Codes | SPP | 0201 | 4 | | |
| Collection Codes | COL | 0328 | 4 | | |
| Locality Codes | LOC | 0101 | 4 | | |
| Prefix & | Counter Help | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| | | | | | |
| Reset to E | Biota's Initial Defaults | | | Cance | Save |





Customizing Biota: Entry Choice Lists

- Available for most Core fields.
- Set up pick-lists for repetitive entries.
- Import and use Authority Lists.
- Type-ahead lookup
- Easy drag-and-drop rearrangement of list items.





| | Set Entry Choice Lists | |
|--------------------------------------|-------------------------------------|-----------------------------|
| | | |
| Check the box next to each field for | which you want an Entry Choice Lis | t to appear (2 Screens) |
| 🛛 [Specimen] Stage/Sex | 🗌 [Locality] Locality Name | Species] Section |
| 🔲 [Specimen] Medium | 🗌 [Locality] District | [Species] Subspecies Author |
| 🛛 [Specimen] Storage | [Locality] State/Province | [Species] Variety Author |
| 🔲 [Specimen] Deposited At | 🛛 [Locality] Country | 🗌 [Species] Common Name |
| 🔲 [Specimen] Type Status | [Locality] Elevation (m) | [Species] Distribution |
| 🗌 [Specimen] Specimen Custom 1 | 🛛 [Locality] LatLong Accuracy | 🗌 [Species] Type Locality |
| 🗌 [Specimen] Specimen Custom 2 | 🗌 [Locality] Alternate Coordinate 1 | 🗌 [Species] Type Depository |
| 🛛 [Collection] Collection Method | 🗌 [Locality] Alternate Coordinate 2 | 🗌 [ImageArchive] Image Name |
| Collection] Site | 🗌 [Locality] Alternate Coordinate 3 | 🗌 [Genus] Tribe |
| Collection] Source | 🗌 [Species] Specific (Species) Name | 🗌 [Genus] Subfamily |
| [Collection] LatLong Accuracy | [Species] Species Author | 🗌 [Genus] Genus Custom 1 |
| Collection] XYAccuracy | 🗌 [Species] Subgenus | 🗌 [Genus] Genus Custom 2 |
| | Screen 1 of 2 | |
| Delete Checked Lists | Turn Off All Lists | Second Screen of Fields |
| Delete All Lists | Revert to Saved | Cancel Save List Settings |
| | | |





| Stage/Sex | | |
|-------------------------------------------------|--------|--|
| Type to match or select from the List pu Female | | |
| Male Adult, sex unknown Juvenile | | |
| Pupa Larva Protonymph | | |
| Deutonymph | Modify | |
| | Cancel | |
| | СК | |

| ype to match. Append or Ins | ert to add. To re-order | , urag and urop iter | ns or use sort button | | |
|-----------------------------|-------------------------|----------------------|-----------------------|----------|----------|
| Female | | | | Sort | |
| Male Adult, sex unknown | | T | | (Insert) | |
| Juvenile | | | | (Append) | |
| Pupa Larva | | | | Edit | |
| Protonymph Deutonymph | | | | | |
| | | | | Delete | |
| | | | | Cancel | |
| | | | ▲ ▼ | Done | |
| | | | | | |
| | | | | | ort |
| Female | | | | | |
| Male | | | | | sert 🗋 🗍 |

Delete

Cancel

Done

Ŧ

Deutonymph





Special tools: Loan Record System

- Automated loans and returns system, with barcode support.
- Loan documents include an ID-ready spreadsheet file, with all collection information for each specimen.
- Identifications recaptured by specimen code, whether specimens are returned or deposited elsewhere.





Special tools: Labels

Automated label printing/text export for

- > pinned insect specimens
- > slide-mounted specimens
- Fluid-preserved specimens
- ➤ herbarium specimens
- custom labels





| Slide Determination Label Options |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sort Options |
| Sort selection by Specimen Code |
| ○ Sort selection taxonomically |
| ○ Use the Sort Editor to sort the records |
| Data Options |
| 🖾 Include Specimen Code on each label |
| 🗌 Include Family on each label |
| Output Options |
| Send labels to printer |
| ○ Save labels as a text file |
| Print Layout Options |
| Over the second seco |
| O Use layout for address label stock |
| Cancel Sort & Output Labels |



| 🗌 👘 Herbarium Label Options 👘 🗐 🗄 | | | |
|--------------------------------------------------------------------------------------------|--|--|--|
| Sort Options Data Options Format Options Output Options | | | |
| | | | |
| Data Options | | | |
| | | | |
| ⊠ Include Specimen Code ⊠ Include Family | | | |
| Append the first Locality Note to Locality description | | | |
| Append [Collection]Site field to Locality description | | | |
| Use the first Specimen Note as field description of plant | | | |
| Use [Collection]CollectionCode as Collector's Number | | | |
| Variable Field Options | | | |
| Select Field | | | |
| Field 1 Determined by Check the box to insert the Field Name before each Field Value on | | | |
| Field 2 Locality Code 🛛 the labels. | | | |
| Field Label Options | | | |
| Select Text to Insert Insert Collector: Defore Collector's name. | | | |
| | | | |
| Insert Collection Date: before Collection Date. | | | |
| Insert Collector's Number: before Collector's Number. | | | |
| | | | |
| Save Herbarium Label settings between sessions | | | |
| Cancel Sort & Output Labels | | | |







Web publishing options 1

- Dynamic pages using Biota's onboard web server:
 - Web Browser Mode: Choose the tables and fields you want to make accessible (stateless)
 - Database Client Mode: Choose which tools from the desktop version to make accessible (state maintained)
 - Example: <u>The ALAS Specimen Database</u> (http://viceroy.eeb.uconn.edu/ALAS/ALAS.html)





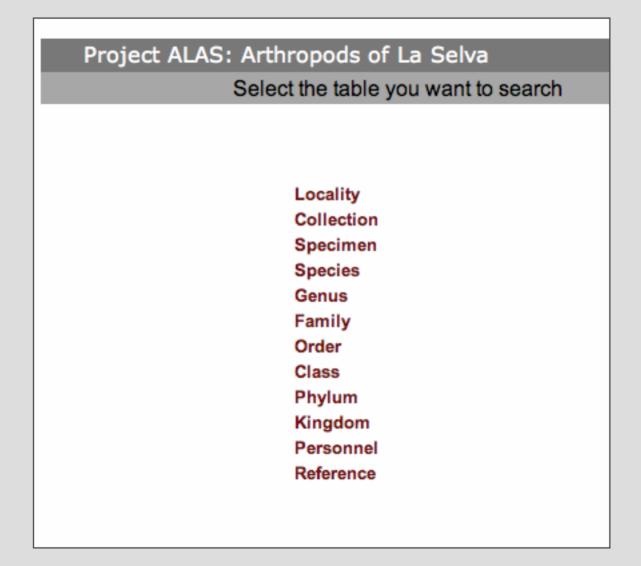
Web publishing options 2

- Exported static web pages, using any web server
 - > Choose the taxa, records, and fields you want to include
 - Images supported
 - > OBFS Field Station example: <u>http://mlbs.org/data.html</u>
 - Museum-based entomological example: <u>http://cumuseum.colorado.edu/Research/Entomology/</u> <u>ento_databases.html</u>
 - Researcher-based entomological example with images: <u>http://cgic.ucol.mx/~mabl/indexe.htm</u>



Web Browser Mode homepage









Project ALAS: Arthropods of La Selva

Database Client

Find

Using the Query Editor Specimens for a Species Lower Taxa for a Higher Taxon Localities or Collecting Events for Species or Specimens Species or Specimens for Localities or Collecting Events

Display Set

Locality Set Collection Set Specimen Set

All Specimens All Collections All Localities All Species All Genera All Families All Orders All Classes All Phyla All Kingdoms

All References All Personnel Species Set Genus Set Family Set Order Set Class Set Phylum Set Kingdom Set

Reference Set Personnel Set





Biota's onboard DiGIR Server (beta)

Darwin Core: A standard designed to facilitate the exchange of information about the geographic occurrence of species

http://wiki.tdwg.org/twiki/bin/view/DarwinCore/WebHome

- DiGIR: Distributed Generic Information Retrieval <u>http://digir.sourceforge.net/</u>
- A DiGIR portal: Natural History Collections Portal <u>http://digirportal.berkeley.edu/</u>



