

Exercises



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Document version 3.2/11.2012

Course A - Introduction to IrisBG

A.M1 Introduction

A.M1.U1 Basic data model and terminology

Objective: Understand the terms used in IrisBG and the principle of “data only entered once”.

Extract from chapter 1.1. in the IrisBG User Guide.

IrisBG is designed with efficiency and flexibility in mind and an important principle is that data is only entered once. Example: *When you change the accepted name for a taxa, all relevant accessions are affected immediately.* The model below illustrates the relationship between the most important data objects in IrisBG.



An accession represents one or more types of plant material obtained by the garden. The material has a botanical name and belongs to a Taxon. Each type of plant material in the accession is referred to as an accession item of a specific type (i.e. living plant, preserved plant material, etc.). A Locality is information about the place where plant material was collected.

- An *Institution* can have multiple *Collections* *.
- A *Collection* consists of *Accessions* and *Items*.
- An *Accession* belongs to a *Taxon*.
- A *Taxon* has one accepted *Name* and may have multiple synonyms.
- An *Accession* can have many or no *Accession Items*.
- An *Accession Item* is of an *Item* type. (e.g. living material, herbarium specimen, etc.).
- An *Accession Item* has a *Location* in the *Collection* (e.g. flowerbed or shelf).

*The average installation would normally consist of one institution with one collection/site.

A.M1.U2 Logging in and navigation between the screens

Objective: Understand how to log in and basic navigation inside IrisBG.

 [Getting started](#), chapter 1.

1. Start IrisBG trial version.
2. In the login dialogue, enter the user name “admin” and the password “changeme”, followed by clicking the [ok] button.
 - a. “changeme” is the password given to all new users.
 - b. You will be reminded to change the password. In a live installation environment we recommend changing the password at the first opportunity. We will not change the password this time.
3. Click [Cancel] to continue without changing the password.

After a successful login, you should have the main screen in front of you.

Using your mouse, navigate to the following screens

1. Accession screen.
 - a. Taxa screen.
 - b. Reports screen.
2. Navigate back from the Reports screen using the navigation history toolbar in the top left corner.
 - a. Click on the blue [left arrow] to go back to the Taxa screen.
 - b. Click again, to go back to the Accession screen.

Result: You should now be in the Accession screen.

A.M2 Searching for records

A.M2.U1 Using standard search fields

 [Getting started](#), chapter 2.

Objective: Find the oldest “Lilium superbum” in the collection.

1. Navigate to the “Accession screen”.
2. Click on [Clear/New] to bring up a blank screen.
3. Place the marker in the “Taxon name” field at the top of the screen.
4. Write “lilium super”.
5. Click the [Search] button on the toolbar.

Result: You should get a list of 4 accessions of “Lilium superbum”. Select the oldest from 1966 by double clicking on the line.

A.M2.U2 Using search fields in the details tab

Objective: Find the same “Lilium superbum” from 1966 by using the fields in the details tab.

1. Click on [Clear/New] to bring up a blank screen.
2. Place the marker in the “Acc. year” field in the details tab.
3. Write “1966” in the “Acc. year” field.
4. Place the marker in the “Taxon name” field below.
5. Start typing the letters “Lilium” in the taxon field. A list of “Lilium” taxa appears. You can either continue to type the whole name or just scroll down the list to find “Lilium superbum” and click on this entry to select.
6. Click the [Search] button on the toolbar.

Result: Accession 1966-1444 should appear on your screen. Because we only have one match for our search, the accession is displayed immediately. **Tip:** *To search, you can use any field that is suffixed with the small circle° or tilde ~, such as “Contact” or “Comments”.*

A.M2.U3 Combining fields using standard search

Try to search for accessions by combining other fields. *Examples:*

- All “Aconitum” with “wild” Provenance. (24 accessions in total)
- All “Allium” received as seeds. (43 accessions in total)

A.M2.U4 Advanced search

 [Getting started](#), chapter 4.

Objective: Retrieve all “Annuals” and “perennial herbs” with images.

Make sure you are in the accession screen.

1. Click on [Clear/New] to bring up a blank screen.
2. Click [Adv. Search] on the toolbar.
 - a. Advanced search is available for “Accession screen”, “Taxa screen” and “Item Management”.
3. Set the search criteria for “Life form”.
 - . Expand the panel named “Taxon” by clicking on the panel title.
 - a. Click the [Life form] check box to enable this criterion.
 - b. From the drop down list select “In list”.
 - c. Select “Annual” and “Perennial herb” in the checked list.
4. Set search criteria for “Images”.
 - . Expand the panel named “Image”.
 - a. Click the [Has images] check box to enable this criterion.
 - b. Select “Yes” from the list.
5. Click the [Search] button on the toolbar.

Result: The search result should give you all the annuals and perennial herbs with images.

A.M3 Update and adding records

A.M3.U1 Updating an existing accession

 [Getting started](#), chapter 3.1.

Objective: Update information about accession 1966-141, “Anthericum ramosum”.

The plant, 1966-141/1 in location “F-50 Rock Garden: Bed 50” has been moved to “F-14 Rock Garden: Bed 14”.

Make sure you are in the accession screen.

1. Retrieve the accession “1966-141”, “Anthericum ramosum”.
2. Click on the [items] tab.
3. Select the “Location” column for item number 1 and change location from “F-50” to “F-14 Rock Garden: Bed 14”.
4. Select the “Status” column and change the status to “Moved”.
5. In the “Date” column, write the current date.
6. Click [Save] in the top right corner.

Result: A green confirmation message should be displayed at the bottom of the screen. Expand item 1 by clicking [+] to the left of the item number to reveal the new history line that was generated.

A.M3.U2 Add a new accession

Objective: Record a “Euphorbia dulcis” planted in the garden today.

 [Getting started](#), chapter 3.2.

Make sure you are in the accession screen.

1. Click [Clear/New] if data is present in the form.
2. Place the marker in the “Acc. year“ field in the details tab.
3. Type the current year.
4. In the taxon field below, enter “Euphorbia dulcis”. You can enter the full name or select it from the list.
5. Record details regarding “Origin”:
 - a. In the “Contact” field select “Alberta” from the drop down list.
 - b. In the Provenance field, select “Garden” from the drop down list.
 - c. Under the “Prop. Hist”. (Propagation history), select “Controlled Breeding” from the drop down list.
6. To add details about planting, click on the “Items” tab.
7. In the “location” column, select “F-02 Rock Garden”.
8. In the “Status” column, select “Planted”
9. Further details may be added in any of the data fields as required.
10. Click [Save] to finish.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now recorded a new accession. Note that the item date was automatically filled in with the current date and that the next available accession number was assigned.

A.M3.U3 Add a new accession with new taxa

Objective: Record a “*Ceanothus americanus*” planted in the garden today. “*Ceanothus americanus*” is a new taxon for the collection.

 [Getting started](#), chapter 3.3.

Make sure you are in the accession screen.

1. Click [Clear/New] if data is present in the screen.
2. If accession year is left empty, the current year is assumed when we save. We will leave the current year empty.
3. In the taxon name field, start typing “*Ceanothus americanus*”. You will see that the entry is not available. Provided this is a clean trial database.
4. Click on the [...] to the right of the taxon name field to open the Taxon screen.
5. If the screen contains data, click “Clear/new”.
6. Record details for the new taxon:
 - a. In the “Genus/monominal” field select “*Ceanothus*” from the drop down list.
 - b. In the species field, type “*americanus*”.
7. You are not required to record more details than this, but optionally you can record:
 - a. A new “common name”. Click the green [+] button. Select “English” and type “Mountain snowbell”.
 - b. On the details tab, in the Distribution field, type “North-America”.
8. IPNI validation.
 - a. It is recommended that you check new names against the International Plant Name Index. We will carry out an IPNI validation in the next exercise.
9. Feel free to add other details.
10. Click [Save] when done.
11. Click [Select and close] to return to the accession.
12. Set “Provenance” to “Garden – wild origin”.
13. Let us record plant location:
 - a. Click the items tab.
 - b. If there are no lines available, click the green [+] to add a new entry
 - c. Select a location F-22 “Rock Garden – bed 22”.
 - d. Record planted date as October 2012. *Dates for plant status can be recorded as full date, month and year or just year. Date separator will depend on your settings so it could be “08/2012”, “08.2012” or “08-2012”.*
 - e. Status = “Planted”
14. Click [Save] when done.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now recorded a new accession and a new taxon.

A.M3.U4 Web Search and IPNI Validation

Objective: Verify spelling and name of the taxon “Ceanothus americanus”, using websearch and IPNI validation.

 [Using web Search, including IPNI validation](#), chapter 1 and 2.

Websearch and IPNI validation are operations you normally carry out as part of recording new taxa. For the purpose of keeping the exercises small, we have made this into a separate exercise.

Instead of opening the “Ceanothus americanus” from the accession screen, we will work directly in the taxa screen.

1. Navigate to the “Taxa” screen.
2. Click [Clear/New] if data is present in the form and search for “Ceanothus americanus”.
Tip: Try searching with partial name. E.g. “cea ame”.
3. On the toolbar, click [Web search] and select “Wikipedia”.
 - a. The “Ceanothus americanus” page on Wikipedia should be displayed. If it is not displayed, check spelling of the name and try again.
4. Adding a successful web search as a web reference.
 - a. Select the “references tab”.
 - b. On the Web references toolbar in the lower part of the screen, click on the blue [+] button to add the Wikipedia web search.
5. Validating the name against the International Plant Name Index (IPNI). *It is recommended that you check newly recorded names against the IPNI database.*
 - a. Select the “Names tab”.
 - b. Click the blue [i] button in the Life Science Identifier (LSID) field.
 - c. Select the entry from 1753.
 - d. Details about author and publication are automatically retrieved from IPNI, in addition to the LSID.
6. Click [Save] when done.

Result: A green confirmation message should be displayed at the bottom of the screen.

A.M3.U5 Adding images

Objective: Add an image to the “Euphorbia dulcis” accession recorded in the earlier exercise.

Make sure you are in the accession screen.


1. Retrieve the “Euphorbia dulcis” accession recorded in the earlier exercise. Tip: You can search for partial names. After clicking [Clear/new], try typing “eup dul” in the Taxon name, followed by [Search].
2. Click on the “Images” tab.
3. To add image
 - a. Click the green [+] to add image.
 - b. Select any image from you own file system.
 - c. Fill in other details of the image in the bottom left corner.
4. Add another image using the clipboard (Optional)
 - a. Click on the link :
http://commons.wikimedia.org/wiki/File:Euphorbia_dulcis_IP0705018.jpg
 - b. Right click on the image and select “Copy”.
 - c. Return to the accession in IrisBG, right click on the image panel on the left side.
 - d. Select “Paste” to insert the image. Note: You would normally add images taken of your own collection. Files from the internet may be copyrighted material.
5. Click “Save” when done.

Result: The new images should be found.

Tip: *You can also add images using “Drag and drop”.*

A.M4 Using maps

A.M4.U1 Recording map coordinates

 [Using maps](#), chapter 3, “Accession items”.

Objective: Record map coordinates for “Euphorbia dulcis” added in the earlier exercise.

Make sure you are in the accession screen.

1. Retrieve the “Euphorbia dulcis” accession recorded in the earlier exercise.
2. Click on the “items” tab.
3. Map coordinates are recorded in the “Coord. Lat.” and “Long” fields. Coordinates can be entered in 3 different ways.
 - a. By typing directly in the coordinate fields.
 - b. By using the coordinate calculator (Click the [...] button).
 - c. By using the map button (Click the map button).
4. In this exercise, we will use the map button. Click the [Map button].
 - a. Drag the marker to the desired location.
 - b. Zoom in using your mouse wheel, by double clicking or by using the zoom slider in the bottom of the screen.
 - c. Change to a different map type from the drop down button at the top.
 - d. Click [select and close] when done.
5. Click “Save” when done.

Result: The new map coordinates should be visible in the “Coord. Lat.” And “Long” fields.

Note: *If you have not purchased the map viewer module, you can still record map coordinates directly in the coordinate fields. The coordinate calculator can be enabled or disabled for the system in the collection map settings.*

A.M4.U2 Creating maps

 [Using maps](#), chapter 6, “Map Reports”.

Objective: Show all accessions recorded after 2009 on a map.

1. Navigate to the “Reports / Maps” screen.
2. Expand the “Local maps”.
3. Select the “Map03 : Accession items map”.
4. Let us complete the accession year criteria:
 - a. Expand the “Accession” panel.
 - b. Click on the “Acc. year” check box.
 - c. Select “Greater or equal” from the drop down list.
 - d. Type “2009” in the “acc. year” field.
5. Click [View] to open the map. *The map markers either indicate garden location area OR exact planting coordinates. For plants without exact location, the location area marker is used.*
6. Click on the marker for “Euphorbia dulcis” to view or update details.
7. Click on another marker to view details. For location areas, you would often get a list of accessions.
8. Click “close” when done.

Result: The map should display about a dozen markers.

A.M5 Using reports

A.M5.U1 Accession report

Prerequisites: Some reports and label templates will produce Excel Spread sheets and Word Documents. For this feature to work, you will need Microsoft Office or another Excel compatible product such as Open Office. Some Word based reports will only work with Microsoft Office.

Objective: Create a list of Accession Data of accessions from 2009.

 [Getting started](#), chapter 6.

1. Click [Reports] on the navigation bar.
2. Click [01:Accessions objects] in the left hand menu of report options and click the [+] sign to expand the options.
3. Select [Accessions data].
4. Set search criteria for Accession year
 - a. Click on [Acc. year] check box to enable this criterion.
 - b. From the drop down menu select ‘is equal’.
 - c. Type ‘2009’ in the box.
5. Click on [View] to view data.
6. The report is opened as an Excel spread sheet. *Note: If you are using Windows 7, click the flashing Excel document icon on your task bar to view the spread sheet.*
7. Close the spread sheet when done.

Result: The spread sheet should contain rows of accessions from 2009.

A.M5.U2 Accession items report

Objective: Create a list of Accession Items with wild provenance from 2004-2006.


1. Click [Reports] on the navigation bar.
2. Click [02:Accession items] in the left hand menu of report options and click the [+] sign to expand the options.
3. Select [Items data].
4. Expand the panel named “Accession”.
5. Set search criteria for Accession year.
 - a. Click on [Acc. year] check box to enable this criteria.
 - b. From the drop down menu select “between”.
 - c. Type “2004” in the first box and “2006” in the second.
6. Set search criteria for provenance.
 - a. Click on [Provenance] further down to enable this criterion.
 - b. From the drop down menu select “is equal”.
 - c. Select “Wild” from the dropdown list.
7. Click on [View] to view data.
8. The report is opened as an Excel spread sheet.
9. Close the spread sheet when done.

Result: The spread sheet should contain rows of accession items with wild provenance from 2004 and 2006.

Course B - Using IrisBG - intermediate and advanced topics

B.M1 Managing your taxonomy

B.M1.U1 Add a new accession using a new taxon and genus

 [Managing your taxa](#), chapter 2+3, “Adding a new genus” and “Working with taxonomic groups”.

Objective: Record a “Tetrapanax papyrifer” planted in the garden today. “*Tetrapanax*” is a new genus for the collection.

Make sure you are in the accession screen.

1. Click [Clear/New] if data is present in the screen.
2. In the taxon name field, start typing “Tetrapanax papyrifer”. You will find that the entry is not available. *Provided this is a clean trial database.*
3. Click on the [...] to the right of the taxon name field to open the Taxa screen.
4. If the taxa screen contains data, click “Clear/new”.
5. In the “Genus” field, start typing “Tetrapanax”. You will find that the entry is not available. Click on the [...] to add the genus
 - a. In the “Rank” field, select “Genus”.
 - b. In the “Name” field, type “Tetrapanax”.
 - c. In the “Parent group” field, select “Araliaceae”.
 - d. Click the [i] to check the name against the IPNI database.
 - e. Click [Save] when done, followed by [select and close]
6. Complete the details for the new taxon:
 - a. In the species field, type “papyrifer”.
 - b. Click the [i] to check the name against the IPNI database.
7. Feel free to add other details. *Try a web search to find details about common names.*
8. Click [Save] when done.
9. Click [Select and close] to return to the accession.
10. Set “Provenance” to “Garden – wild origin”.
11. Record planting details. *The plant is located in “S-70 “Systematic: Araliaceae”.*
12. Click [Save] when done.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now recorded a new accession, a new taxon and a new genus.


B.M1.U2 Recording of synonyms

Objective: Add “Panax papyrifer” as a synonym to “Tetrapanax papyrifer”.

1. Navigate to the “Taxa” screen.
2. Find the taxon “Tetrapanax papyrifer”.
3. In the “Names” tab, click [+] to add a new name.
4. Select “Panax” as genus.
5. In the “Species” field, type “papyrifer”.
6. Click the [i] to check the name against the IPNI database.
7. Click [save] when done.
8. Let us add a new accession using the synonym “Panax papyrifer”.
9. Navigate to the “Accession” screen.
 - a. Record a new accession of “Panax papyrifer”.
 - b. Provenance, “Garden – wild origin”.
 - c. The plant is located in “S-70 “Systematic: Araliaceae”.
10. Click [save] when done.

Result: “Panax papyrifer” is now a synonym of “Tetrapanax papyrifer”.

B.M1.U3 Removing an expired taxon


 [Managing your taxa](#), chapter 1, “Removing an expired taxon”.

Objective: Remove “Campanula garganica” as a valid taxon. *Note: This is a constructed example.*

1. Navigate to the “Taxa” screen.
2. Retrieve the taxon “Campanula garganica”.
3. Click “Expire”.
4. In the “Expired taxon” dialogue:
 - a. The “Campanula garganica” is now known as “Campanula crenulata”.
 - b. We will record “Campanula garganica” as a synonym of “Campanula crenulata”.
Click the “Treat as synonym” checkbox.
 - c. Click “Ok”.
5. The screen now displays the accepted name and the synonym.
6. Let us have a look at the accessions.
 - a. Click on the “references tab”.
 - b. Click on the accessions object button [...].
 - c. Select accession 1969-8363.
 - d. Observe that the “Determination history” shows the original name and that the accepted name is now shown for the taxon name.
 - e. Click [close] when done.

Result: “Campanula garganica” is now a synonym of “Campanula crenulata”.

B.M1.U4 Using custom attributes

 [Using custom attributes](#), chapter 1, “Introduction”.

Objective: Record flowering period for “Tetrapanax papyrifer”


1. Navigate to the “Taxa” screen.
2. Retrieve the taxon “Tetrapanax papyrifer”.
3. Click the [*] to add all attributes.
4. Record the flowering period.
 - a. Flowering from = “Mid summer”
 - b. Flowering to = “Late summer”.
5. Click [save].
6. You will notice that unused custom attributes are removed from the list when you save.

In a later exercise, we will add our own custom attributes.

Result: The “Tetrapanax papyrifer” flowering period has now been recorded.

B.M2 Tasks and inspections

B.M2.U1 Recording a new task

 [Tasks and inventories](#), chapter 1,2 and 3, “Recording a new task”, “Create a task report” and “Create a task map”.

Objective: Record a task “Allium Exhibition”.

Make sure you are in the Tasks screen, found in the “Management” section.

1. Click [Clear/New] if data is present in the screen.
2. In the “Name” field, type “Allium exhibition”.
3. In the “Type” field, select “Exhibition”.
4. In the “Entries kind” field, select “Item”.
5. Let us add items.
 - a. In the entries list, click the [...] to open the accession screen.
 - b. In the “taxon name” field, type “Allium” and press search.
 - c. With the mouse, select a few items from the list by holding the “ctrl” key down at the same time. *Tip, it makes sense to select living accession items.*
 - d. Click [Select and close] when done.
6. Click [Save].
7. Additional exercises
 - a. Create an “Items data” report of the exhibition. *Tip: “Tasks”, “Inspections” and “Exchanges” are commonly referred to as “Events”.*
 - b. Create an “Accession items” map of the exhibition.
8. Change the task status to “Closed” and click [save].

Result: A green confirmation message should be displayed at the bottom of the screen. You have now recorded a task.

B.M2.U2 Recording a new inspection

Objective: Record an inspection of “Ginkgo biloba”.

Make sure you are in the Inspection screen, found in the “Management” section.

1. Click [Clear/New] if data is present in the screen.
2. In the “Name” field, type “Inspection of Ginkgo biloba”.
3. Let us add items.
 - a. In the entries list, click the [...] to open the accession screen.
 - b. In the “taxon name” field, type “Ginkgo” and press search.
 - c. With the mouse, select the 5 living trees found in the list.
 - d. Click [Select and close] when done.
4. Click [Save].
5. Record details for the individual inspections.
 - a. Select the first record and fill in the values in the inspection details on the right.
 - b. Move to the second record and repeat.
 - c. Feel free to complete details on all 5 inspections.
6. When completed, set status to “Closed” and click [Save].

Result: A green confirmation message should be displayed at the bottom of the screen. You have now recorded an inspection.

B.M3 Item management

B.M3.U1 Updating accession items

 [Item management](#), chapter 1 and 2, “Produce labels” and “Divide garden location”.

Objective: Update plant status to “Inspected” for “Ginkgo biloba” inspection.

Make sure you are in the Item management screen, found in the “Collections” section.

1. Click [Clear/New] if data is present in the screen.
2. In the “Event name” field, select “Inspection of Ginkgo biloba”.
3. Click [Search].
4. Let us update the plant status.
 - a. Set Status = “Inspected”.
 - b. Status date is by default set to today.
5. Click [Update] when done.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now updated the plant status on all 5 accession items.

B.M3.U2 Creating plant labels

Objective: Print “Medium” plant labels for plants in “Perennials: bed 2”.

Make sure you are in the Item management screen, found in the “Collections” section.

1. Click [Clear/New] if data is present in the screen.
2. In the “Location” field, select “R-02 Perennials: bed 2”.
3. In the “Label type” field, select “M1 Medium size”.
4. In the “label ok” field, select “No”.
5. Click [Search].
6. 5 plants are listed. Let us print the labels.
 - a. Select the “Create labels” tab.
 - b. In the label type field, select “M1 – Medium size”.
 - c. Click [view].
 - d. The word document should display 5 labels.
7. Let us update the label information for the plants.
 - a. Select the “Update items” tab.
 - b. In the label ok field, select “Yes”.
8. Click “Update” when done.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now updated the label information on all 5 accession items.

Course C - Administrating IrisBG

C.M1 Customizing the system

C.M1.U1 Adding item status

Objective: Add new items statuses “Dead (Environmental stress)” and “Dead (Neglect)”.

Navigate to the “Acc. item status” screen found in the “Definitions” section.

1. Add status “Dead (Environmental stress)”.
 - a. Click [+] on the toolbar to add a new entry.
 - b. Select “Planting” as item type.
 - c. In the “status text” field, type “Dead (Environmental stress)”.
 - d. In the “status type” field, select “Passive”.
 - e. In the “sort” field, type in the value 13, placing it at the end of the list.
2. Repeat the procedure for “Dead (Neglect)”.
3. Using the sort order, let us now ensure that the three “Dead...” records are placed together.
 - a. Change the sort order of “Dead” to 12.
 - b. Change the sort order of “In seed store” to 11.
4. Click [Save].
5. Click on the “Sort” column header to verify the order of the entries.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now introduced two new item status records.

C.M1.U2 Adding code list entries

Objective: Add task type “Inventory”.

Navigate to the “Code lists” screen found in the “Definitions” section.

1. Locate the “Task type” list and click the [+] to expand the content.
2. Add entry “Inventory”.
 - a. Select a row in the “Task type” list.
 - b. Click [+] on the toolbar to add a new entry.
 - c. Type “INV” in the “Value” field.
 - d. Type “Inventory” in the “Name” field.
3. Click [Save] when done.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now added a new task type.

C.M1.U3 Changing reports

 [Advanced Reporting](#), chapter 4 and 5, “Report types” and “Changing an existing report”.


Objective: Modify the columns displayed in the “Items data” report.

Navigate to the “Report types” screen found in the “Definitions” section.

1. Locate the report “Item02”, “Items data”.
2. Click on the drop down button found in the “Fields” column.
3. Remove column “Infratype1” as follows:
 - a. Select the column in the list of “Selected fields” on the left.
 - b. Click the red [x] button to remove.
4. Repeat the operation for “InfraName1”, “Infratype2” and “InfraName2”.
5. Add the “ItemStatusDate” column.
 - a. On the right hand side of the dropdown dialogue, locate and select the “ItemStatusDate” field.
 - b. Click the green [+] to add the field.
6. Place the “ItemStatusDate” field after the “ItemStatus” field at the end.
 - a. Select the field on the left hand side.
 - b. Click the [Down arrow] button to move the field downwards.
7. Click [save].
8. Test the report in the “reports” screen.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now changed a report layout.

C.M1.U4 Adding a new report

 [Advanced Reporting](#), chapter 6, “Add a new report”.

Objective: Create a new report displaying plant measurements.

Navigate to the “Report types” screen found in the “Definitions” section.

1. On the toolbar, click [+] to add a new report.
2. Select base report “Item02”.
3. In the “Report code” column, type “item03”.
4. In the “Name” column, type “Item measurements”.
5. Add the following fields.
 - a. AccNoFull.
 - b. TaxonName.
 - c. Height.
 - d. Girth.
 - e. Diam.
 - f. ItemLocation.
 - g. ItemStatus.
 - h. ItemStatusDate.
6. Click [save].
7. Test the report in the “reports” screen.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now added a new report.

C.M2 Changing custom attributes

C.M2.U1 Adding custom attributes

 [Using custom attributes](#), chapter 2, “Adding your own fields”.

Objective: Add a new custom attribute “Sub. collection”.

Navigate to the “Custom attributes” screen found in the “Definitions” section.


1. On the toolbar, click [+] to add a new custom attribute.
2. In the “Target” column, select “Accession”.

This example could alternatively be recorded with “Taxon” as target. Each time a new accession is recorded, the user can record which “Sub. Collection” the accession belongs to.
3. In the “Name” column, type “Sub. collection”.
4. In the “Data type” column, select “List”.

By selecting a self-populating “list”, the values available to the user will automatically grow as new entries are added in the accession screen.
5. Click [save].
6. Try out the new custom attribute by updating a few accessions.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now added a new custom attribute.

C.M2.U2 Adding your own code list

 [Using custom attributes](#), chapter 3, “Adding your own code lists”.

Objective: Add a new custom attribute “Technical use”, with its own code list.

Navigate to the “Code list types” screen found in the “Definitions” section.


1. On the toolbar, click [+] to add a new code list.
2. In the “Codelist” column, type “Plant use type”.
3. Click [save].
4. Navigate to the “Code lists” screen.
5. Click [+] to add a new entry.
 - a. In the “Codelist” column, select “Plant use type”.
 - b. In the “Value” column, type “E”.
 - c. In the “Name” column, type “Edible”.
6. Repeat this for the following codes. **Tip:** Use the keyboard shortcut “Alt^+” to add new entries.
 - a. “M”, “Medicinal”.
 - b. “B”, “Building”.
 - c. “C”, “Clothing”.
 - d. “X”, “Other”.
7. Click [Save].
8. Let us now add the custom attribute.
 - a. Navigate to the Custom attribute screen.
 - b. Click [+] to add a new entry.
 - c. In the “Target” column, select “Taxon”.
 - d. In the “column name”, type “Technical use”.
 - e. In the “code list”, select the new codelist “Plant use type”.
9. Let us also add a custom attribute, “Technical use descr.”.
 - a. This attribute can be data type = “String”.
 - b. Format = 100. *This will limit the length of the text to 100 characters.*
10. Click [save].
11. Try out the new custom attribute by updating a few taxa.

Example: “Tetrapanax papyrifer”, technical use “Other”, Technical use descr. “Paper”.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now added a new custom attribute with your own code list.

C.M3 Access control

C.M3.U1 Changing user access

 [Managing user access](#), chapter 1, 2 and 3, “Fundamentals”, “Best practices” and “Changing access for existing user”.


Objective: “Gary Gardener” is leaving at the end of the month. Let us update his access.

Navigate to the “User accounts” screen found in the “Authorization” section.

1. Locate the row for “gga” and click [+] to reveal the details.
2. In the “valid to” column, enter the date of the end of the month.
3. Click [save].

Result: A green confirmation message should be displayed at the bottom of the screen. You have now changed the access for “Gary Gardener”.

C.M3.U2 Resetting forgotten passwords

 [Managing user access](#), chapter 4, “Resetting forgotten passwords”.


Objective: “Bob Botanist” has forgotten his password.

Navigate to the “User accounts” screen found in the “Authorization” section.

1. Locate the row for “bbo”.
2. In the “Password” column, click the drop down menu and select the only value available “<changeme>”.
3. Click [save].
4. Next time “Bob” logg in, he will be reminded to change his password.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now reset the password for “Bob Botanist”.

C.M3.U3 Adding a new user

 [Managing user access](#), chapter 5, “Adding a new user”.

Objective: “Doreen Green” is starting in her new job as a gardener tomorrow.

Navigate to the “Personnel” screen found in the “Management” section.

1. Let us record details about “Doreen Green”.
 - a. Click [Clear/New] if data is present in the screen.
 - b. In the “Initials” field, type “dge”.
 - c. In the “last name” field, type “Green”.
 - d. In the “First name” field, type “Doreen”.
2. Click [save].
3. Let us give Doreen access to the system.
4. Navigate to the “User accounts” screen found in the “Authorization” section.
 - a. Click [+] to add a new entry.
 - b. In the “Initials” column, select “dge”.
 - c. In the password column, select “<changeme>”.
5. Click the green [>] button to add access.
 - a. In the “Collection” field, select “IrisBG Trial Garden”.
 - b. In the “Role” field, select “Gardener”.
 - c. In the “Valid from” field, type today's date.
6. Click [save] when done.

Result: A green confirmation message should be displayed at the bottom of the screen. You have now granted access to “Doreen Green”.