



Project no. 018340

Project acronym: EDIT

Project title: Toward the European Distributed Institute of Taxonomy

Instrument: Network of Excellence

Thematic Priority: Sub-Priority 1.1.6.3: “Global Change and Ecosystems”

C5.120 User documentation and training manual

Due date of component: Month 43

Actual submission date: Month 43

Start date of project: 01/03/2006

Duration: 5 years

Organisation name of lead contractor for this component: 2 MNHN

Project co-funded by the European Commission within the Sixth Framework Programme (2002-2006)		
Dissemination Level		
PU	Public	X
PP	Restricted to other programme participants (including the Commission Services)	
RE	Restricted to a group specified by the consortium (including the Commission Services)	
CO	Confidential, only for members of the consortium (including the Commission Services)	

INTRODUCTION

One of the EDIT achievements is a cyber-platform (<http://dev.e-taxonomy.eu/platform/>) providing a large range of computer tools for taxonomists (<http://dev.e-taxonomy.eu/platform/>, <http://www.bdtracker.net/>). These tools are designed to assist the taxonomist from fieldwork to publication of results, including the management of descriptive data, which have a key role in the taxonomic revision process. However, a common observation is that the existing software tools dedicated for generating or analysing descriptive data are not frequently used by taxonomists, and sometimes not even well-known.

The present component describes the solution selected to provide some user documentation and training on descriptive data.

WHAT DOES USER DOCUMENTATION CONSIST OF ?

Here are some categories of documents that can be helpful for users:

Training material

Some training activities on descriptions and identification already exist (e.g. courses in the master of MNHN-UPMC, EDIT summer school) and are repeated each year. Back-up material used during these trainings must be accessible for general users as well as for new trainers, as part of a training manual.

Tutorials and user guides

We have listed tutorials accessible on line and have created new ones (for the tool Xper2). Tutorials are step by step lessons with short graphical examples. They are usually designed for specific use cases such as: “How to transfer descriptions from a spreadsheet to a more structured knowledge base?” or “How to add new descriptions into the CDM?”.

We can see in Table 1 that the main tools have user guides accessible on line. User guides are more or less complete documentation on the functionalities of a tool.

Participative information

Wikis, user forums and mailing lists: information is edited collectively or shared.

Other documents

Scientific meetings are opportunities to inform the taxonomists about tools for descriptive data management and to collect their specific needs for such information. Some posters, flyers, abstracts (etc.) elaborated for these meetings has been collected and should be accessible.

Table 1: collection of documents for the user guide on descriptive data and identification tools.

Title of the documents	URL	Remarks
Tutorials and user guides		
Xper ² in action	http://lis-upmc.snv.jussieu.fr/lis/?q=en/resources/scientific_videos	Video of demonstration of the main features of the software tool Xper ²
Lucid Key Server help	http://www.lucidcentral.org/Portals/1/help/key_server/Lucid%20Key%20Server%20Help%20Documentation.pdf	
Lucid Online Player help	http://www.lucidcentral.org/Portals/1/help/key_server/Lucid%20Key%20Server%20Online%20Player%20Help%20Documentation.p	

	df	
Lucid Phoenix player help	http://www.lucidcentral.org/Portals/1/help/phenix/playerhelp/default.htm	
Lucid Fact Sheet Fusion help	http://www.lucidcentral.org/Portals/1/help/fsf/v1/default.htm	
Help for the Lucid Builder (last version 3.5)	http://www.lucidcentral.org/Portals/1/help/lucid3/v3_4help/Builder/default.htm http://www.lucidcentral.org/Portals/1/help/lucid3/v3_5help/builder/default.htm	
DELTA Intkey tutorial	http://florabase.calm.wa.gov.au/help/keys/intkey_tutorial.pdf	A particularly clear and concise guidelines to the DELTA Intkey software.
General user guide on DELTA	http://delta-intkey.com/www/uguide.htm#_3.2_Data_organization	Introduces the data organisation of the DELTA system
User guide for the DELTA EDITOR	http://delta-intkey.com/www/delta-ed.htm#_Importing_DELTA_Text	A complete user guide for the main DELTA programs (Confor, Delfor, Key, Dist, Intkey, Intimate).
Tutorial on XPER ²	http://lis-upmc.snv.jussieu.fr/lis/ressources/xper2/doc/tuto/lesson1_10steps_to_create_KB.pdf	Tutorial for creating a knowledge base in ten steps.
Training material		
Course on identification	Not yet on line.	General course on identification by prof. R. Vignes-Lebbe, for the EDIT Summer School 2009.
Participative information		
Lucidcentral.org Forums	http://www.lucidcentral.org/Support/Forums/tabid/240/Default.aspx	Discussion forums for Lucid users. 10 forums into 4 groups : general FAQ's, Lucid3 discussions, Lucid Phoenix discussions, Fact sheet fusion discussions)
Species-ID	http://www.species-id.net/wiki/	This wiki is dedicated to species descriptions and identification keys.
Other resources		
A character may hide another	http://www.e-biosphere09.org/posters/D10.pdf	An EDIT poster by Fradin & Al. on knowledge formalization in the taxonomic context. Focuses on the representation of characters for standardized descriptions. Presented at the e-Biosphere conference, London 2009.
Dallwitz's comparison of interactive identification programs	http://delta-intkey.com/www/comparison.htm	Softwares compared: Intkey, IdentifyIt, Lucid, MEKA, NaviKey, PollyClave, XID. This very complete and instructive comparison offers a general view on the features of interactive identification.
Lucid Demo keys	http://www.lucidcentral.org/Keys173/SearchforaKey/tabid/217/Default.aspx	

HOW TO ACCESS DOCUMENTATION AND TRAINING MANUALS ?

The EDIT BD Tracker has already a section for tutorials of tools managing descriptive data (<http://www.bdtracker.net/softwareTracker/list/all/type/21>). We are filling this section with links and documents that would help users to get more familiar with tools for descriptive data. A link to access this documentation will be available also from the EDIT platform Cybergate in the section "Description" (<http://www.bdtracker.net/softwareTracker/list/all/type/all>).

We propose to use the non exhaustive list for these help documents as given in Table 1. This list must be improved when new documents are produced or found on the Internet.

Another important step is to provide concrete examples of knowledge bases in order to show all the diversity of results that can be provided by this kind of tools. This is the aim of the **open**

inventory (in course, see C5.116 and future C5.122) on the wiki Species-ID (<http://www.species-id.net/wiki/>). Furthermore, the BD Tracker has a section called “data”, it means that some examples of keys and knowledge bases can be added here.

CONCLUSION

This work is a first and necessary step in the promotion of computer tools for descriptive data. The list of documents of interest has to be updated when new documents are produced in a context or another (e.g. posters from congresses, new training course on identification, new tutorial on a particular software tool). We have to keep in mind that practical use of tools are crucial and must be encouraged with illustrated tutorials and live training courses (e.g. during the EDIT Summer School).