



# Taxonomic Editor

## User manual part 3:

# Introduction to the Taxonomic Editor

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The Taxonomic Editor is the desktop application used to edit data stored in the CDM (Common Data Model) database hosted on a CDM Server. This editor is a tool designed for specialists – knowledge of taxonomy and biological nomenclature are a prerequisite for its use.

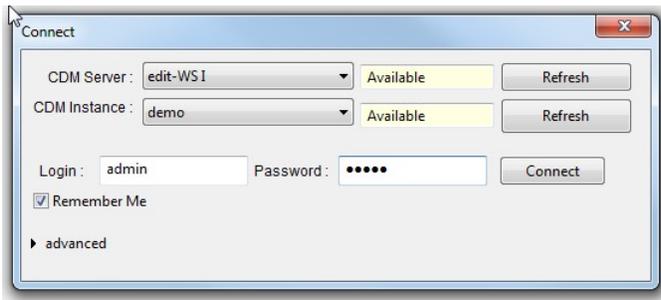
# 1 Accessing a database in the Taxonomic Editor

Start your Editor either from the shortcut on your desktop or by double-clicking the TaxonomicEditor.exe directly.

As an example, we use an empty demo database (also see chapter 2 of the Manual):

In the menu, choose *General -> Connect*. In the following dialog choose the *CDM Server* “**demo I**” and the *CDM Instance* “**demo\_##**” (where ## stands for a number from 01 to 05; if you are on your own, you can use any of these, in a workshop the group number is issued to you).

The default *Login* is “**admin**” and the *Password* “**00000**”.



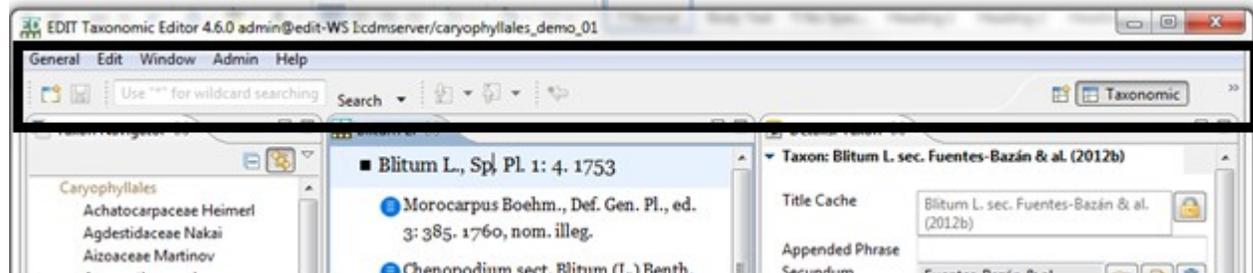
Click on *Connect*.

Now you are ready to try the Taxonomic Editor!

## 2 General Behaviours and Navigation

### 2.1 Parts of the Taxonomic Editor

The user interface of the Taxonomic Editor is highly configurable. Basically, it consists of a Toolbar area on the top and a number of windows below that take up most of the space. In the Toolbar area, there is



*TaxEditor toolbar area*

the main menu and, below, a row with series of tools, including a button to save your changes and a search bar to search within your data set. To the right, there is a selector where you can choose the “perspective”, i.e. a standard pre-configuration of the windows below the toolbar. We will start to work with the “Taxonomic perspective”.

### 2.2 Mouse and Keyboard Functions

In all sections of the Taxonomic Editor except the top menu clicking the **right mouse button** will open up a context menu containing a list of possible commands that can be performed on the data element the mouse is pointing at. When no commands are available a right-click will have no effect.

Most of the commands written in the manual are based on the user using the mouse. However, it is also possible to use the keyboard for some functions. Notably, when pop-up boxes require confirmation by selecting ‘OK’ or ‘Finish’, the default setting will be on the OK/Finish button, therefore you can select OK/Finish by pressing Return on the keyboard as well as by clicking the button with the mouse.

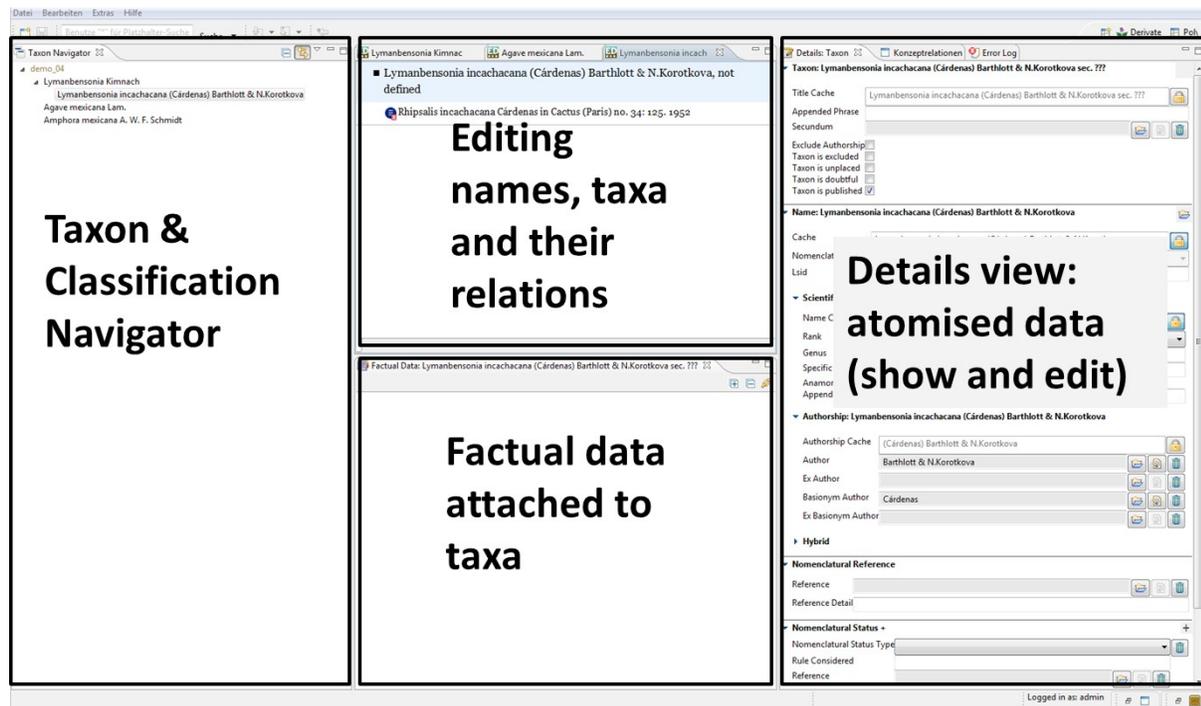
Keyboard arrows can be used to navigate around the Toolbar area to find menu options and make selections. Click on one of the menu items using the mouse or press the Alt-key, then you can use the arrows on the keyboard to navigate within the menu and the Return/Enter key to make your selection.

### 2.3 Navigating between Windows

To change the active subwindow of the Taxonomic Editor navigate between them using the mouse; clicking in a subwindow will activate it.

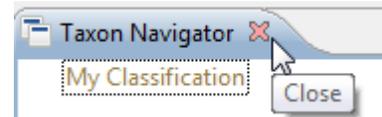
### 3 The User Interface – Basics

In the taxonomic perspective, the subwindows have the following functions:

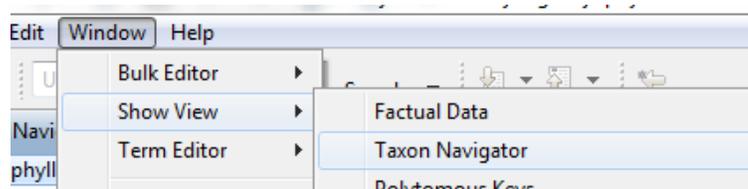


In the following, we will call these subwindows *Taxon Navigator*, *Name Editor*, *Factual Data* view and *Details* view. The individual subwindows can be closed, opened, sized and arranged according to your needs and preferences.

For example, when you start a fresh installation of the Taxonomic Editor you have the *Taxon Navigator* on the left. Close it by clicking on the X in the tab:



To open it again, go to the menu: *Window* -> *Show View* -> *Taxon Navigator*.



It works this way for most of the subwindows that are available in the Taxonomic Editor.

As in other applications, you can enlarge or minimise a window by clicking on the symbols on the top right.

You can move subwindows with the mouse. Try moving the (empty) *Details* view. Grab it with the mouse pointer at the top



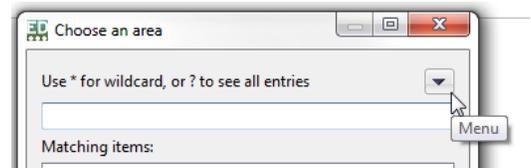
and move it around. You can make it into a tab in an existing pane by dragging it onto a subwindow tab in that pane.

Try to restore the original screen, with the *Taxon Navigator* to the left, the (empty) *Name Editor* centre top, the *Factual Data* centre bottom and the *Details* to the right.

On the top right of the Taxonomic Editor Interface, you can choose a *Perspective*. These are pre-arranged subwindows for special purposes.

When you exit the Taxonomic Editor using the menu (*General -> Exit*), your last subwindow settings will be preserved.

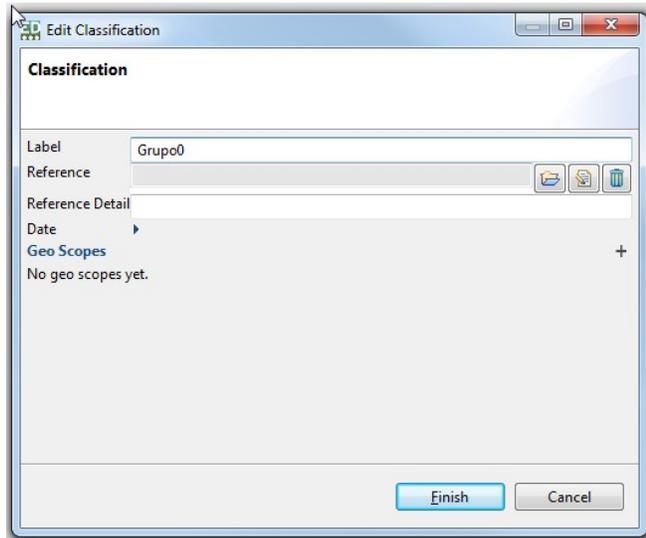
In dialogs that allow you to select data from catalogues (e.g. person names, bibliography, geographical areas), clicking on the triangle to the right opens a context menu.



## 4 Basics: creating and saving a record

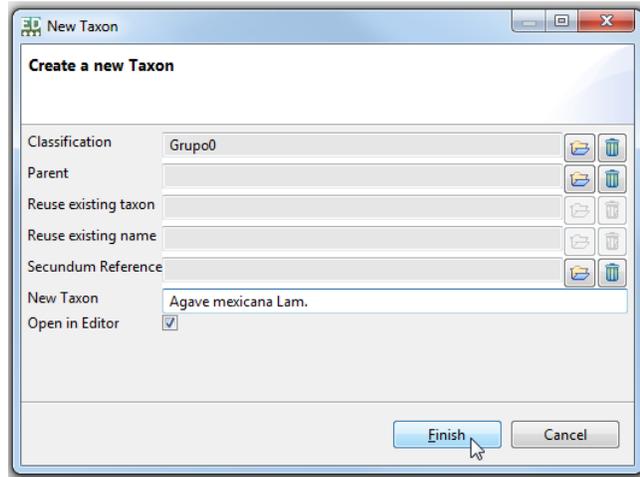
For a first demonstration of the capabilities, we will create our own classification, add a taxon and have a look at what happens in the Interface.

Right click on My Classification in the *Taxon Navigator*, -> *Open in .. -> Classification Wizard*, and change the Label from “My Classification” to a label of your choice -> *Finish*.



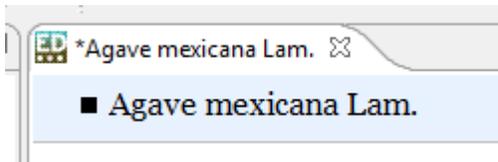
Add a taxon: Right click on your new classification in the *Taxon Navigator* -> *New -> Taxon*

Enter a taxon name, e.g. “Agave mexicana Lam.” -> *Finish*.

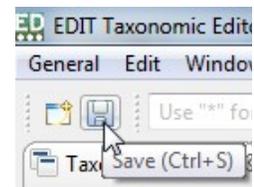


By leaving the *Open in Editor* choice tagged, we had asked to have the new taxon opened in the *Name Editor*, and that’s what happens, it appears in the central *Name Editor* window.

N.B.: The new taxon was automatically saved in the database. Once you change anything in the *Name Editor* or its *Detail View*, you will have to explicitly save it:



NB: A leading asterisk indicates that the record has not been saved. Always use Ctrl-S or the *Save* button after making changes.



We can have a look at our data in the respective Data Portal: Click on the following link or paste it into your browser: [http://ws1.cybertaxonomy.org/dataportal/empty\\_demo\\_##/](http://ws1.cybertaxonomy.org/dataportal/empty_demo_##/) (where ## stands for a number from 01 to 05, in accordance with the database you opened, see above).

You will find *A. mexicana* in the *Classification* section (which corresponds to the hierarchy in the *Taxon Navigator* of the Taxonomic Editor). A double-click on the name opens the taxon page for our entry (up to now without much data).

## 5 Basics: Details and Caches

Have a look at the *Details* view to the right on your screen.

Note that the name has actually been parsed into its data elements (Genus, epithet, author, rank).

First you will note that there is a certain duplication of data elements. There are so-called “Cache” elements and the broken down atomic data elements.

With “good data”, the “Caches” are texts that have been put together from other, more “atomized” elements (like in this case).



You cannot enter data into the cache fields, as long as you did not open the lock beside the cache.

Try to open the *Cache* field in the *Name* section.

The “atomized” data that are not used to calculate the cache are than highlighted. Try and change the name in the Cache.



Save and have a look at your data portal:  
[http://ws1.cybertaxonomy.org/dataportal/demo\\_###/](http://ws1.cybertaxonomy.org/dataportal/demo_###/)

**The Output always represents the Cache data, even when atomized data exist.**

We can use the cache fields to store preliminary unstandardized data (as they often result from data imports).

Switch back the padlock to its locked position.

The Cache record **will be overwritten** by the concatenated value.



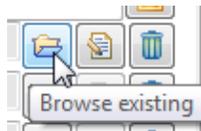
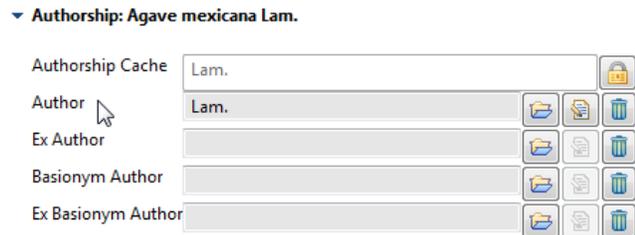
Don't forget to Save!

The screenshot shows the 'Details' view for 'Agave mexicana Lam.'. The 'Name' section is expanded, showing the 'Cache' field with the value 'Agave mexicana Lam.' and a padlock icon to its right. Below it, the 'Nomenclatural Code' is 'ICNAFP' and 'Lsid' is empty. The 'Scientific Name' section is also expanded, showing 'Name Cache' with 'Agave mexicana' and a padlock icon. Other fields include 'Rank' (Species), 'Genus' (Agave), 'Specific Epithet' (mexicana), 'Anamorphic' (unchecked), and 'Appended Phrase'. The 'Authorship' section is expanded, showing 'Authorship Cache' (Lam.), 'Author' (Lam.), and 'Ev Author'.

The screenshot shows the 'Details' view for 'Agave mexicanaxxx Lam.'. The 'Name' section is expanded, showing the 'Cache' field with the value 'Agave mexicanaxxx Lam.' and a padlock icon to its right. Below it, the 'Nomenclatural Code' is 'ICNAFP' and 'Lsid' is empty. The 'Scientific Name' section is also expanded, showing 'Name Cache' with 'Agave mexicana' and a padlock icon. Other fields include 'Rank' (Species), 'Genus' (Agave), 'Specific Epithet' (mexicana), 'Anamorphic' (checked), and 'Appended Phrase'. The 'Authorship' section is expanded, showing 'Authorship Cache' (Lam.), 'Author' (Lam.), and 'Ev Author'. The 'Cache' field and the 'Name Cache' field are highlighted in orange.

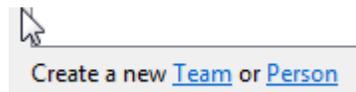
## 6 Basics: Editing and choosing data in the Details view

Throughout the Taxonomic Editor, there are a few further symbols for specific functions. Let's try these in the *Authorship* section of the *Details* window.



The folder button opens a search interface for existing data items. If you don't find it, you can enter a new one. Try to change the author from "Lam." to "Hernández".

You will have to create a new Person for that:



Enter the "Abbreviated Title (= Standard author abbreviation) and watch out for the cache setting!")



The *Edit* button directly opens the entry and lets you change it. Use it with caution: with full rights **the changes here will change all occurrences** of the entry in the database! For example, if you change "Lam." to "Hernández" using this function, all names in the database with author Lam. will be changed to author Hernández.

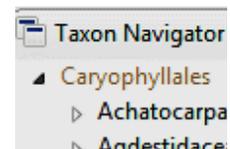


The garbage bin button will remove the selected item from this record – it will not delete it from the database. Try to remove and put it back using the *Browse existing* button.

Further symbols:



In the *Factual Data* window you find these + / - symbols. They work similarly to the triangles in the *Taxon Navigator*, opening and closing subordinate items.



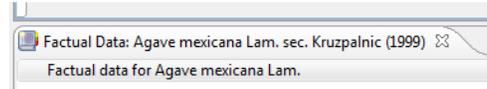
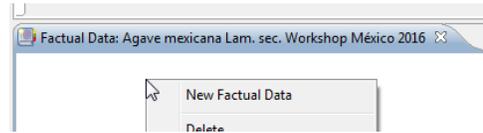
When you find a + symbol after an entry, it means that there are additional data.

## 7 Basics: Factual Data

To be able to add “Factual Data”, you have to have a (saved!) Taxon selected in the *Name Editor* window.

With a right click in the white space of the *Factual Data* window you can add a factual dataset.

Note that you can add more than one factual dataset (for example, if you want to add data from different floras that all use the same taxon concept).

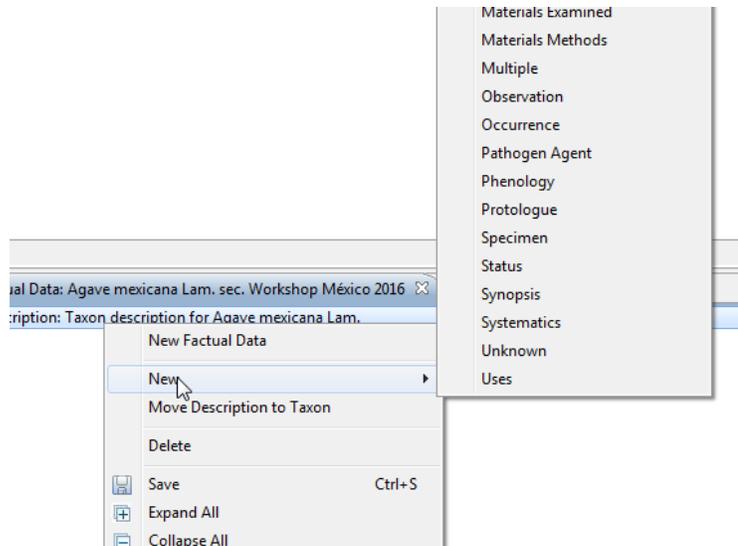


(And don't forget to save!)

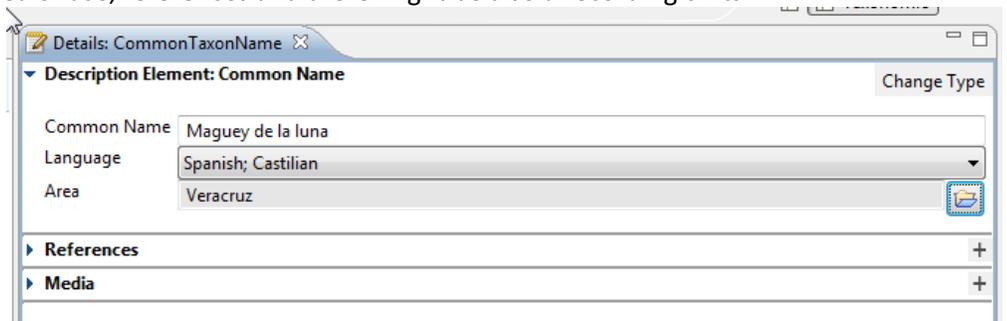


Within the Factual Dataset you can add different *Features*.

Right click on the *Factual data for* -line and -> *New* for a selection of preconfigured and user defined features (the *Feature Tree*)<sup>1</sup>.



Try *Common Name* to see that the *Details* window now displays the specific data for a common name: the name itself, its language, area of use, references and there might be also a recording of its pronunciation (*Media*).



<sup>1</sup> To select, which features are available for Factual Data entry go to the menu, *Preferences -> Taxonomic Editor -> Description -> Features* and make your selection.