

Tutorial on descriptive data

Lesson 1

10 steps to edit taxonomic descriptions

This **lesson 1** proposes 10 simple steps to create your first application using Xper2. Additional functionalities to edit data are explained in **lesson 2**. How to use descriptions for identification is described in **lesson 3**. How to analyse taxonomic descriptions is proposed in **lesson 4**. The import/export functions and the links with standards and with external softwares are explained in **lesson 5**.

If Xper2 is not installed on your computer, download it at the adress:

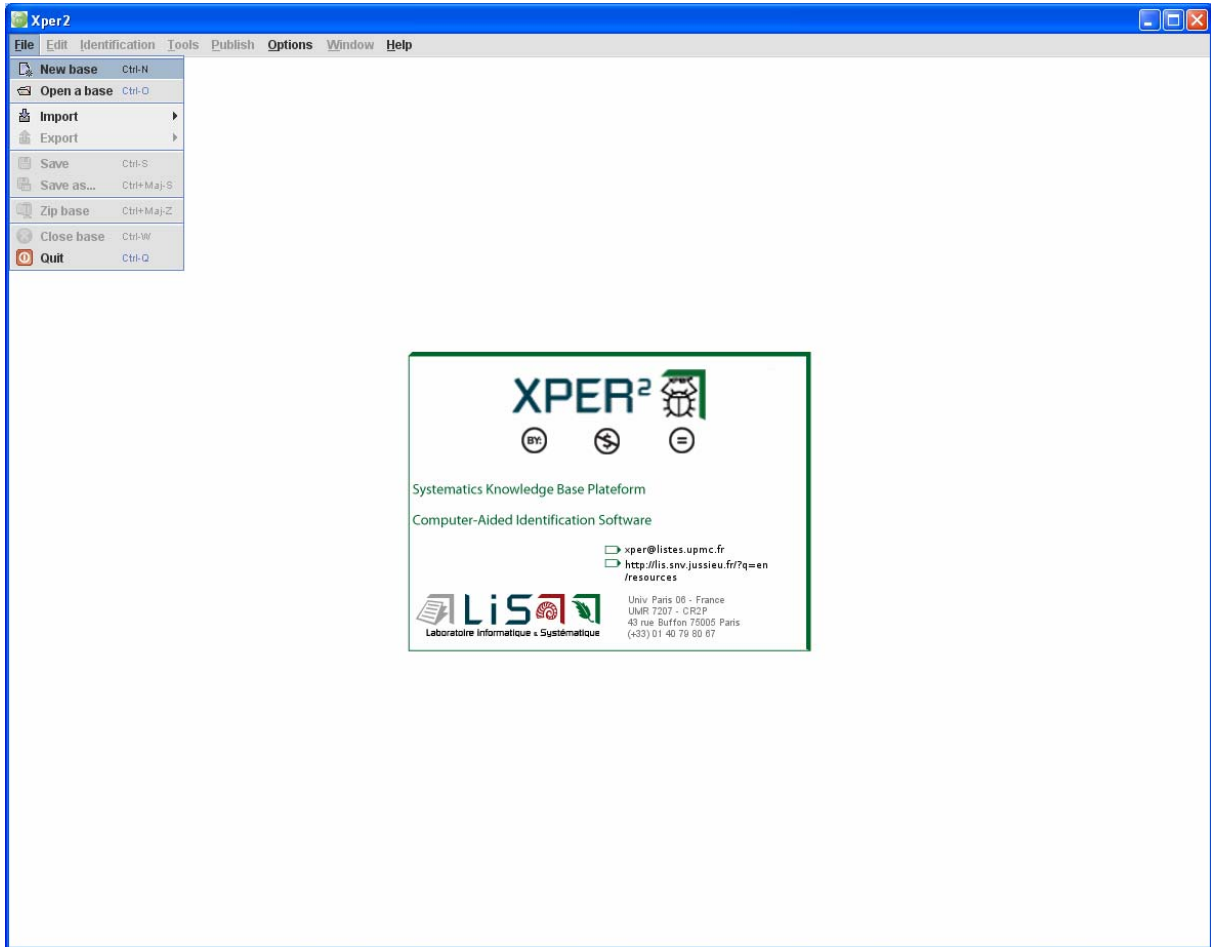
<http://lis-upmc.snv.jussieu.fr/lis/?q=ressources/logiciels/iao/xper2/telechargements/derversion>

This software is available for Windows 2000/XP/Vista, Linux and MacOS operating system. It is free.

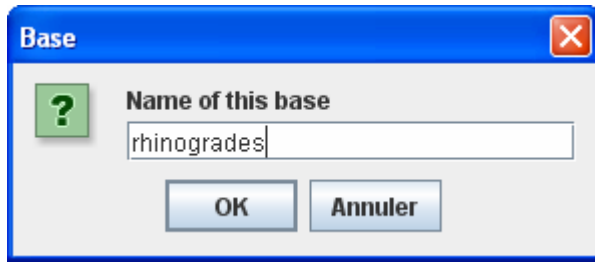
The interface is accessible in french, english or spanish. Other languages will be soon available.

To access to a video on Xper2, click here.

1) Open the software and select the menu File – New base



2) Give a name to the new knowledge base

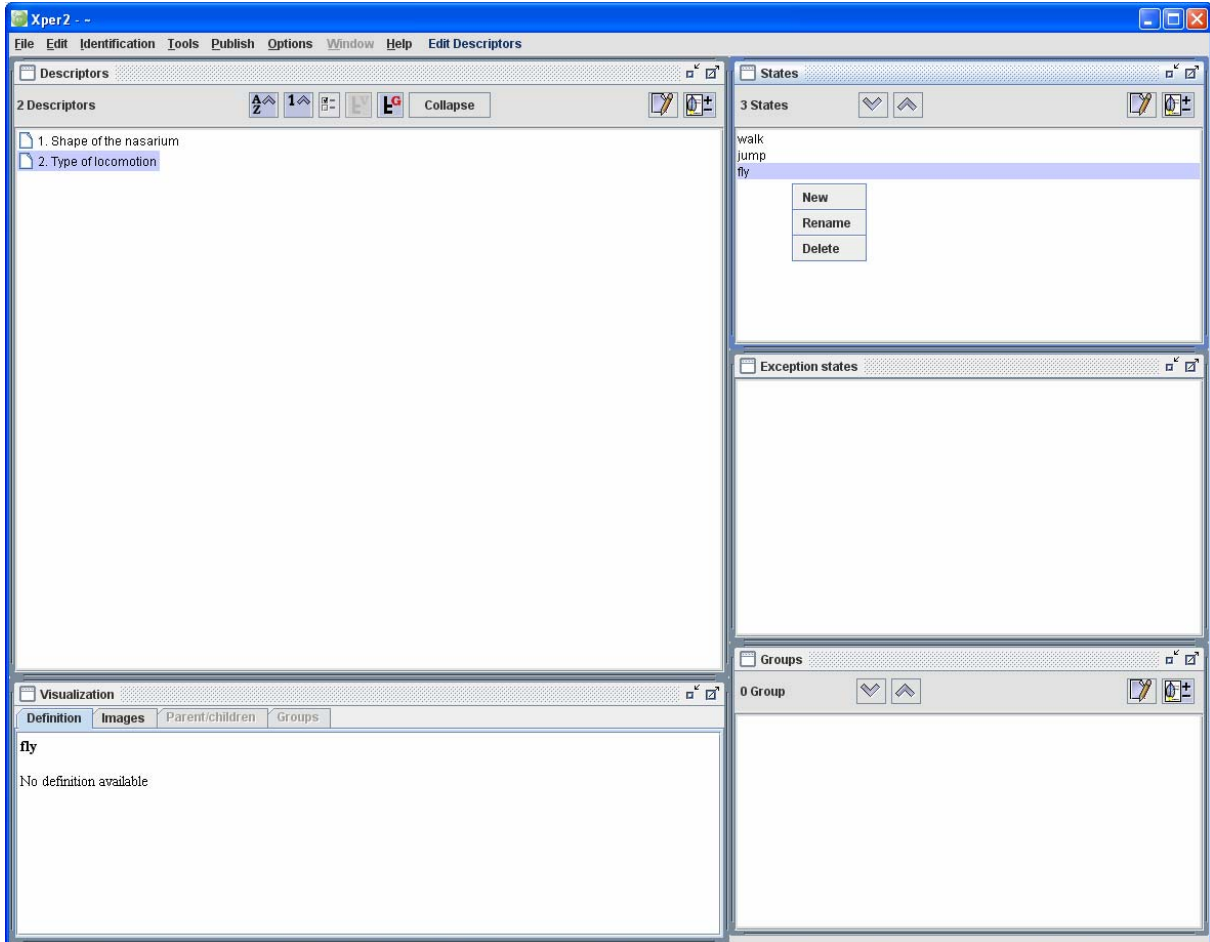


The image shows a dialog box titled "Base" with a blue header bar and a red close button. Inside the dialog, there is a green question mark icon on the left. To its right, the text "Name of this base" is displayed above a text input field. The input field contains the text "rhinogrades". Below the input field, there are two buttons: "OK" and "Annuler".

3) Edit Descriptors and states

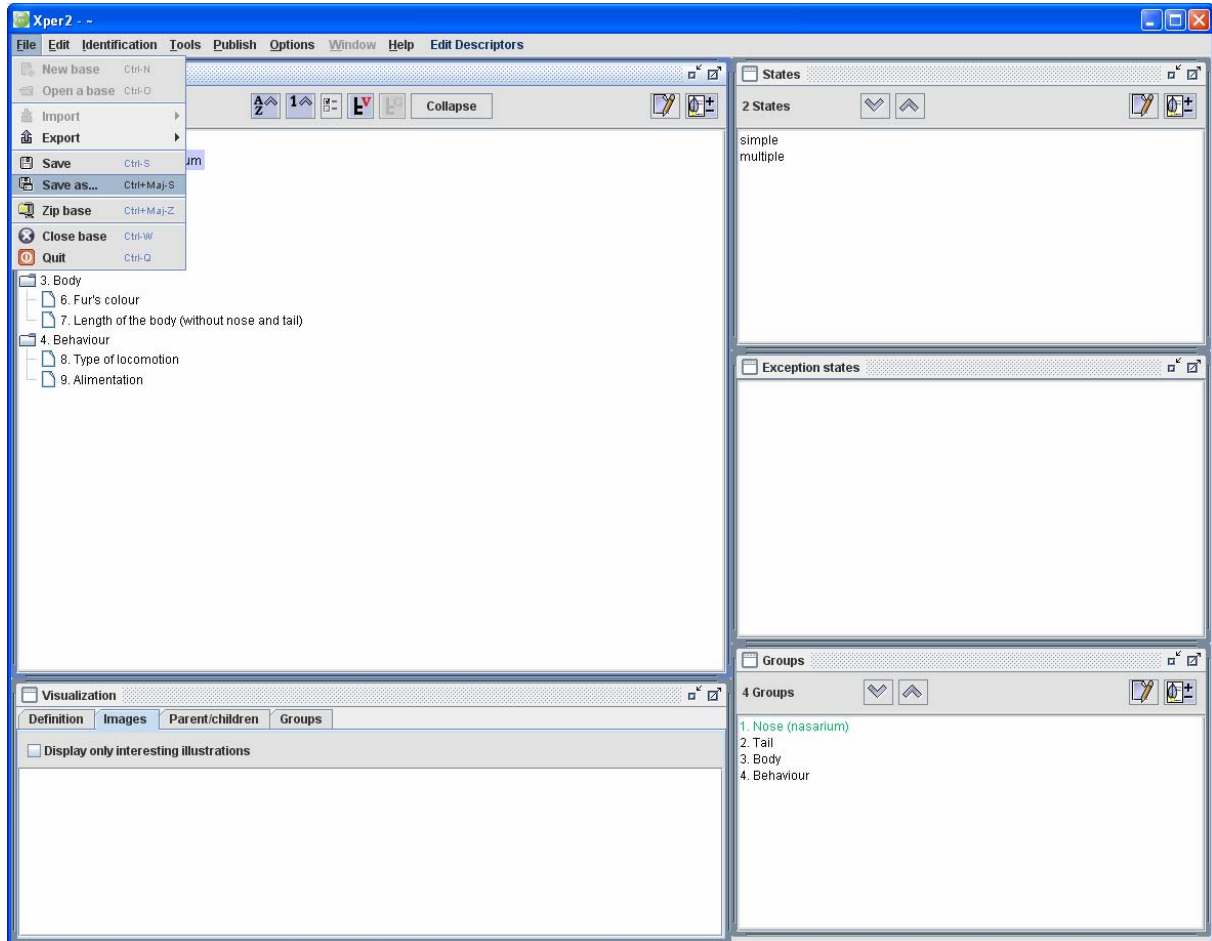
To compare automatically the descriptions, these data must be expressed in a structured format, using the same terminology. So you have to define the list of descriptors (or characters like “shape of the ears”) and the values accepted (states ; i.e. “round”, “triangular”, “linear”) for each one.

Click in a window with the right mouse button and choose **new** or **rename** to label descriptors and states for each descriptor.




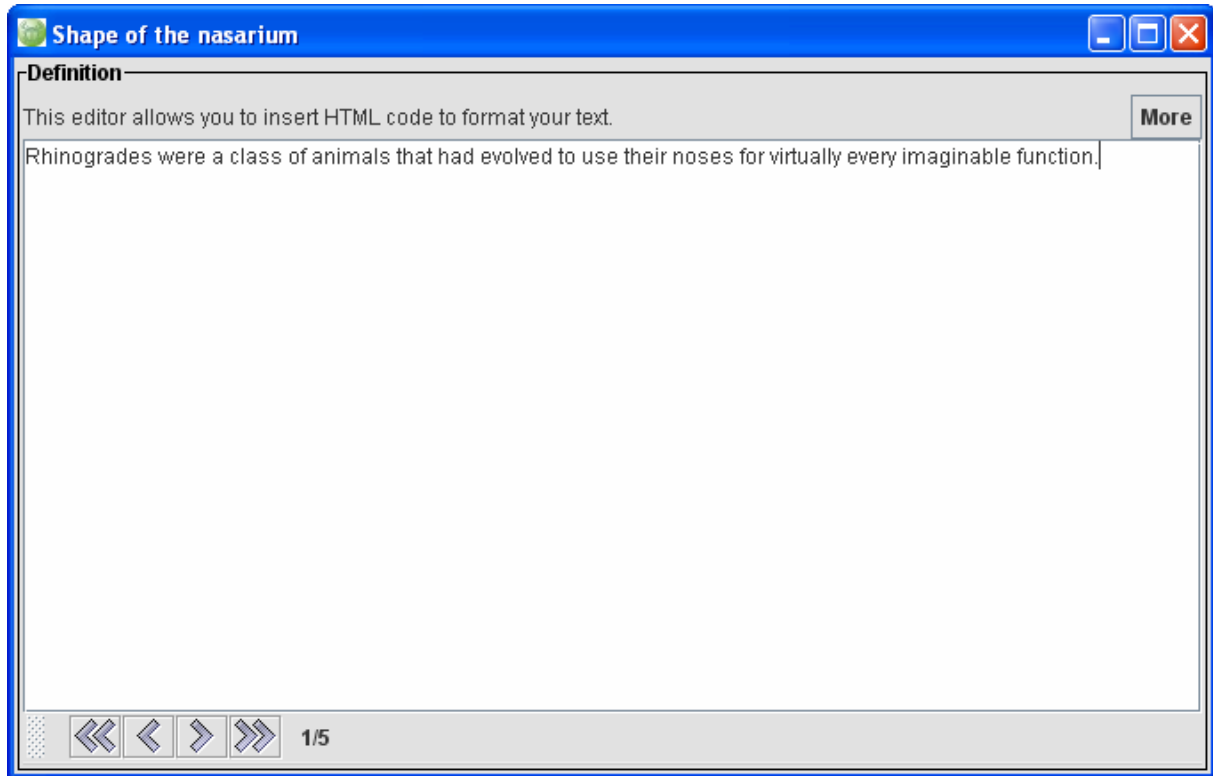
4) Save the knowledge-base

Select **File – Save as ...** and give a name for the files (Remark : in case of Xper2, a knowledge base is stored in several files ; you can use **File – Zip base** to store all the files in a single zip)




5) Adding texts to comment description element

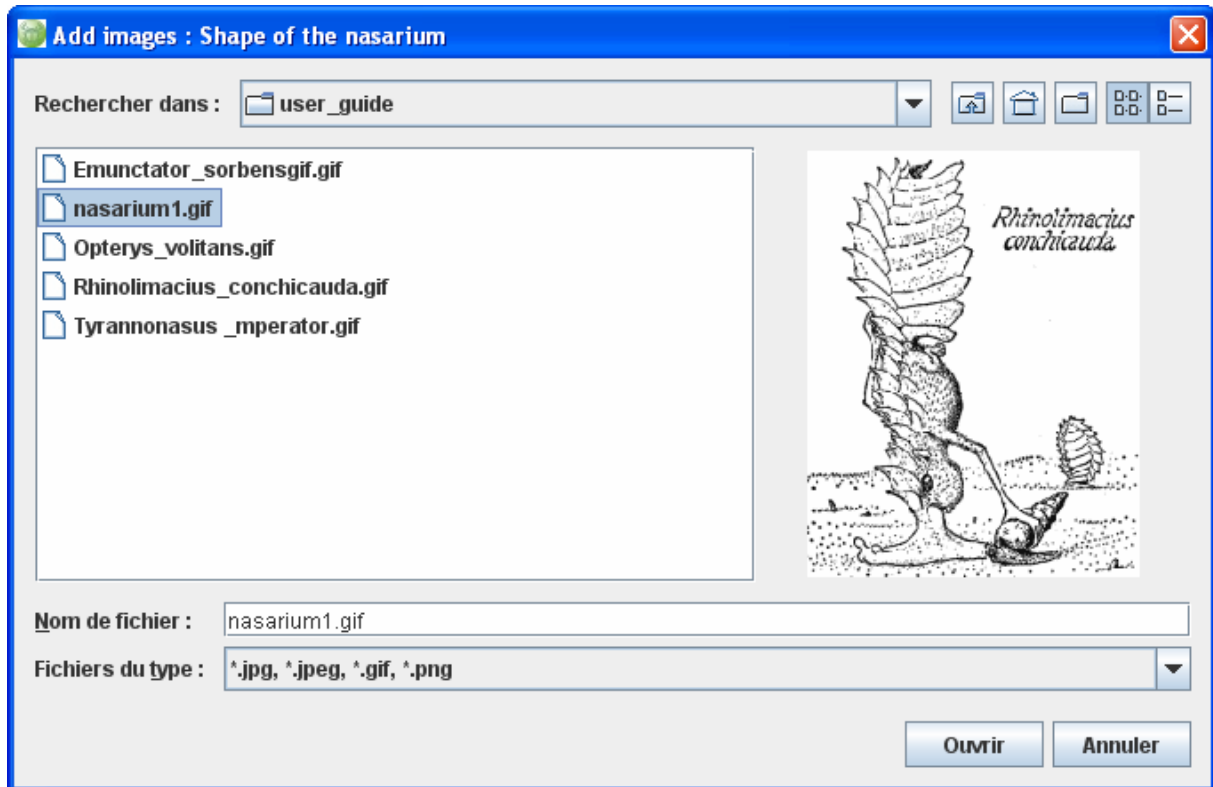
Click on the button icon with a pencil  to add text on a selected element. For example to add a comment on the descriptor “Shape of the nasarium”.



Remark: you can include HTML tags to format the text or to add hyperlinks.

6) Adding illustrations

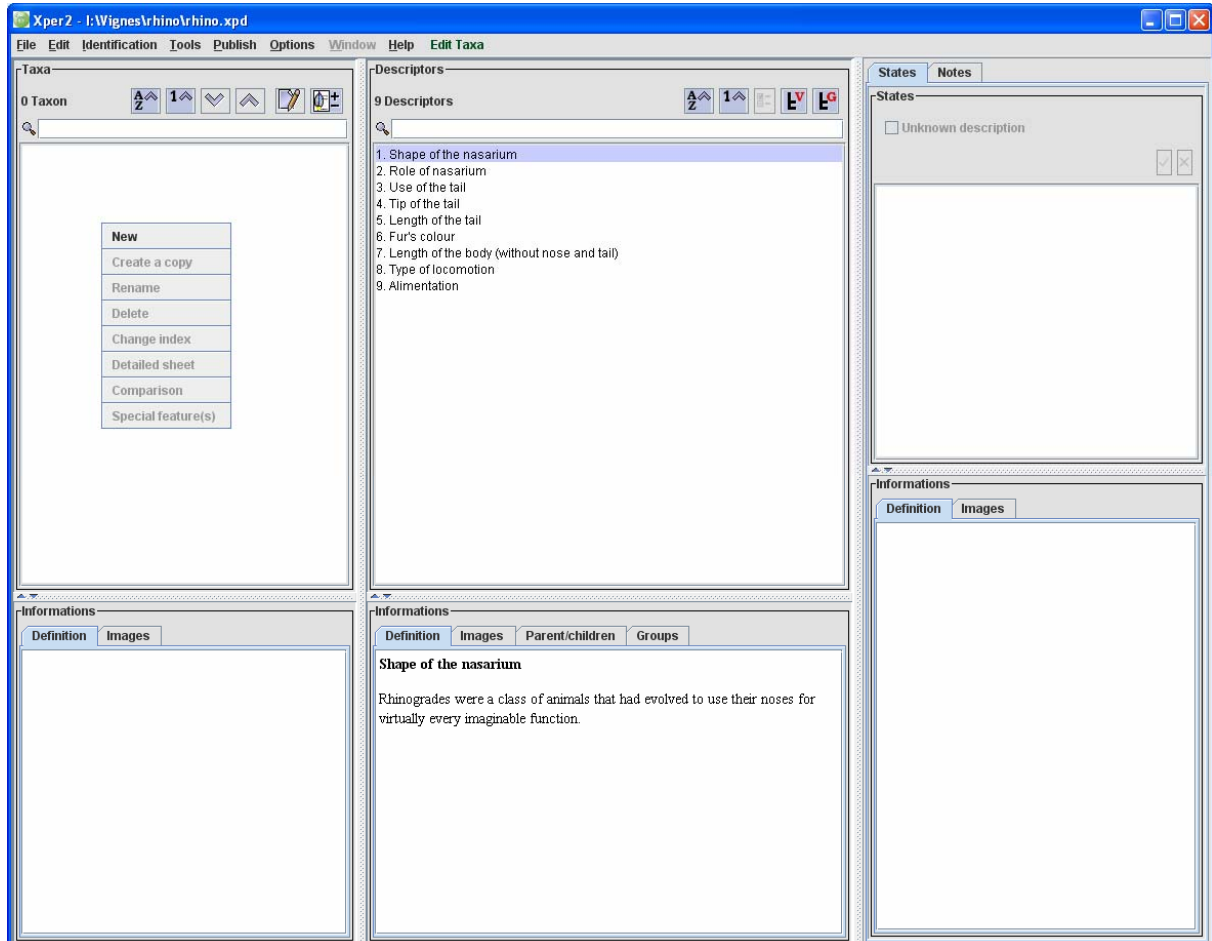
Click on the button  and select one or several pictures to illustrate the selected element (descriptor, state, group, or taxon)



7) Edit taxon list

Select **Edit – Edit taxa**

Click on the window **Taxa** to add taxon names.

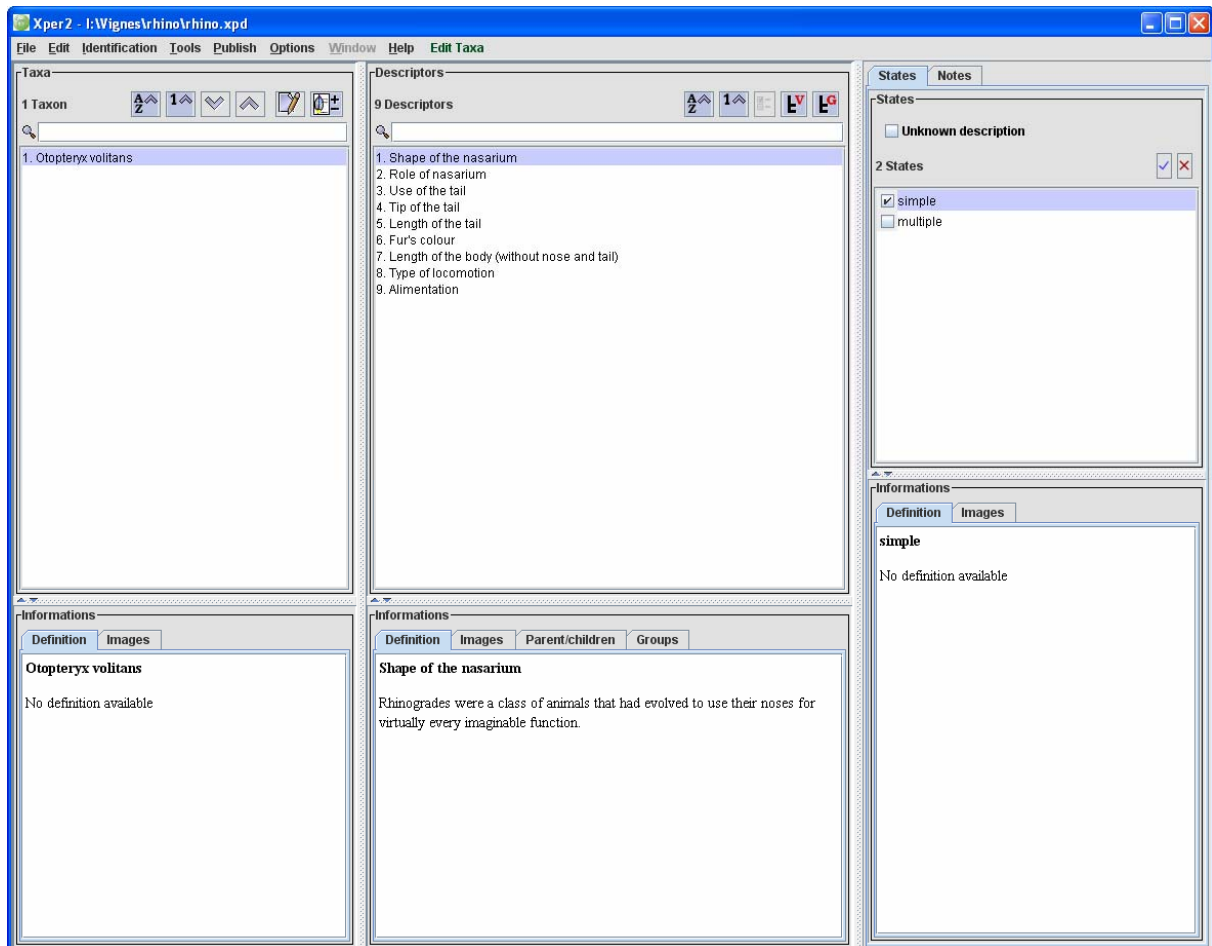


8) Edit the description of a taxon

Select a taxon in the list.

Select a descriptor.

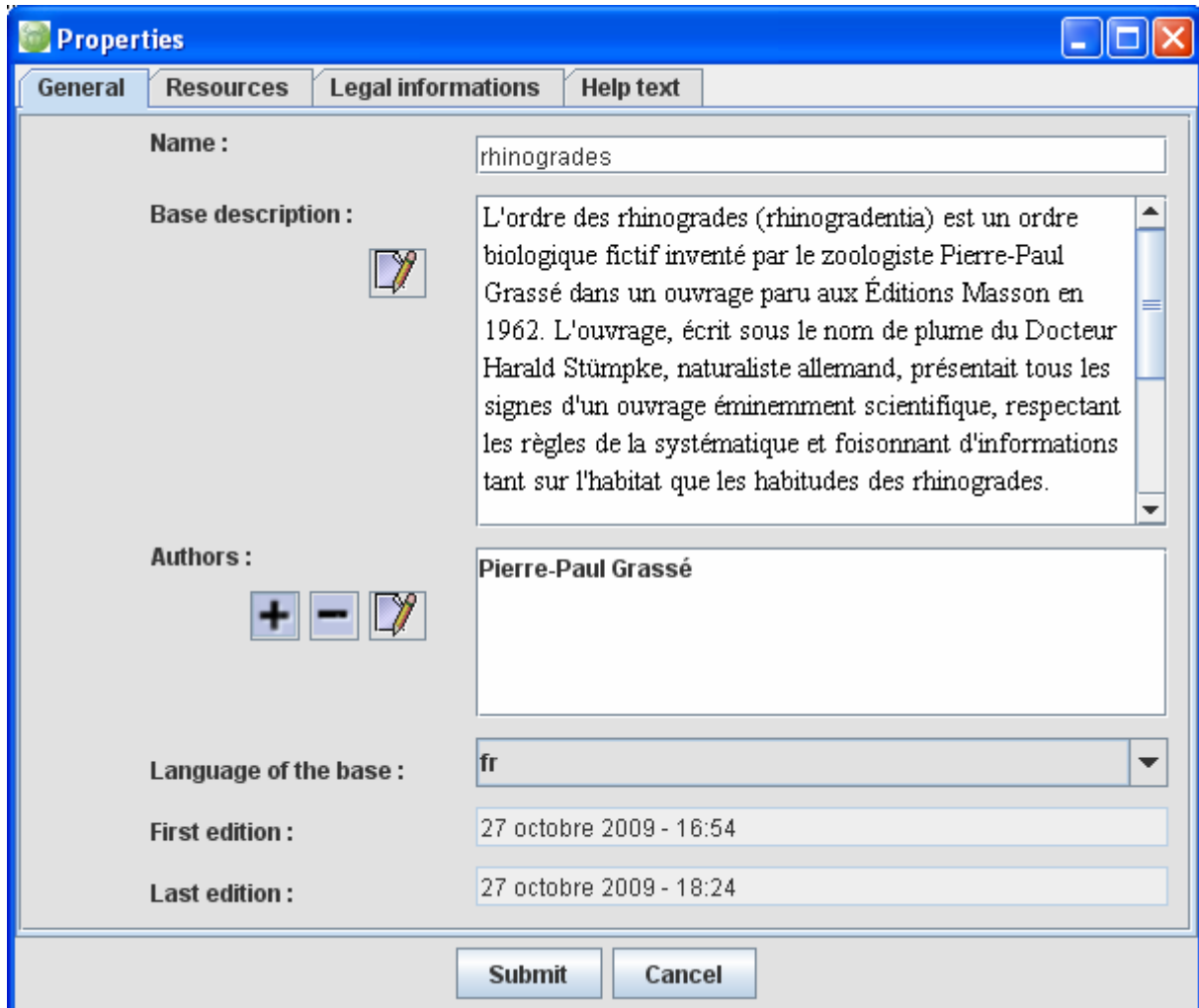
Check the possible states. If you ignore the description check **Unknown description**.



9) Metadata

Select the menu **Edit - Properties**.

Fill the different forms to describe the metadata (context, authors etc.)



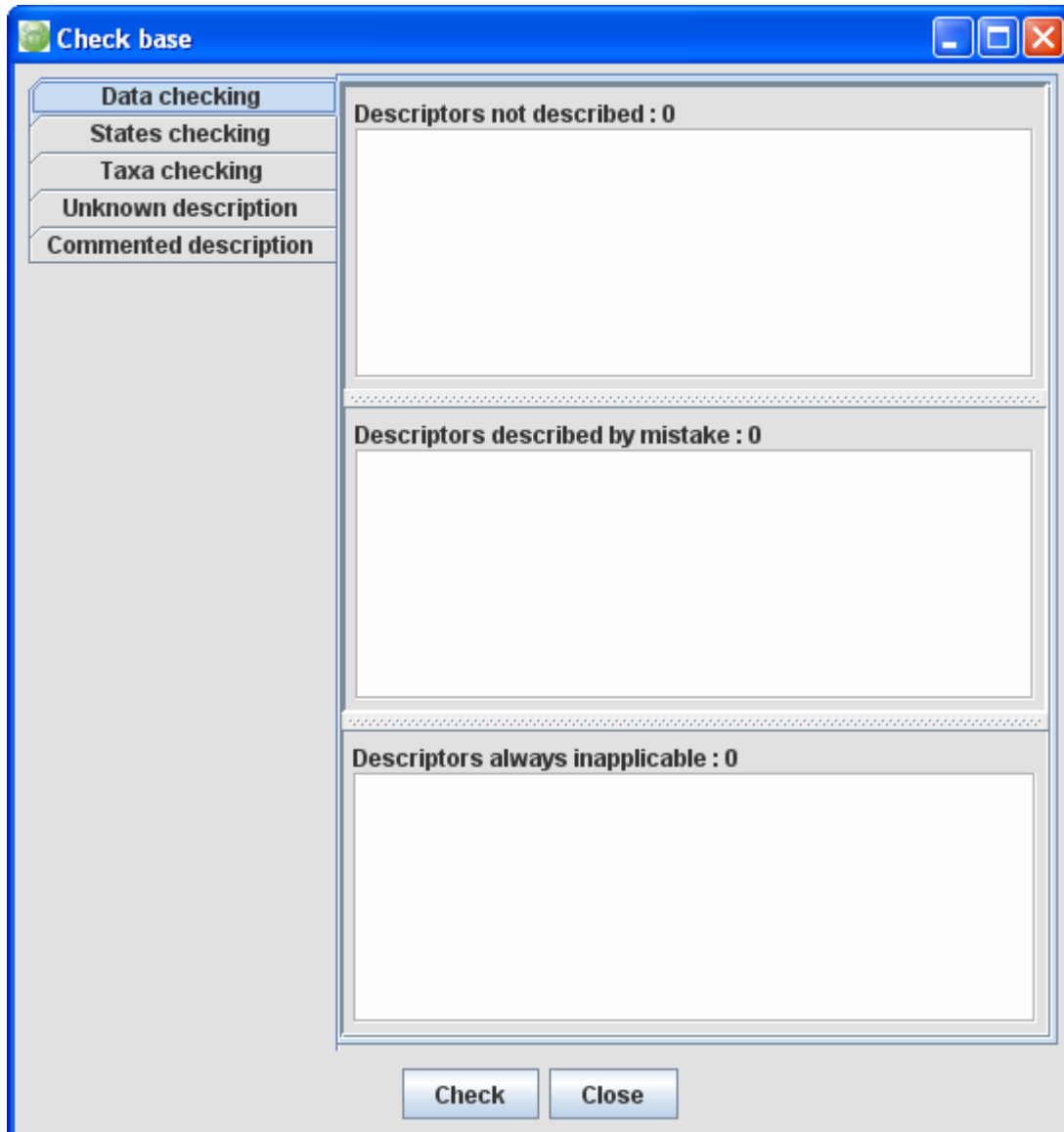
The screenshot shows a 'Properties' dialog box with four tabs: 'General', 'Resources', 'Legal informations', and 'Help text'. The 'General' tab is active. The form contains the following fields and controls:

- Name :** A text input field containing 'rhinogrades'.
- Base description :** A text area containing the text: 'L'ordre des rhinogrades (rhinogradentia) est un ordre biologique fictif inventé par le zoologiste Pierre-Paul Grassé dans un ouvrage paru aux Éditions Masson en 1962. L'ouvrage, écrit sous le nom de plume du Docteur Harald Stümpke, naturaliste allemand, présentait tous les signes d'un ouvrage éminemment scientifique, respectant les règles de la systématique et foisonnant d'informations tant sur l'habitat que les habitudes des rhinogrades.' To the left of the text area is a small icon of a notepad and pencil.
- Authors :** A text area containing 'Pierre-Paul Grassé'. To the left are three icons: a plus sign, a minus sign, and a notepad and pencil icon.
- Language of the base :** A dropdown menu with 'fr' selected.
- First edition :** A text input field containing '27 octobre 2009 - 16:54'.
- Last edition :** A text input field containing '27 octobre 2009 - 18:24'.

At the bottom of the dialog box are two buttons: 'Submit' and 'Cancel'.

10) Check the descriptions

Select the menu **Tools – Check the base** to access to the following window. It displays information specially about the consistency of the descriptions (**Data checking**) and about the possibility or not to distinguish the different taxa (**Taxa checking**). If necessary, correct the descriptions or add new descriptors to separate the taxonomic descriptions.



Click **here** to download a small application about rhinogradentia order.