

EXEMPLAR GROUPS PORTALS DESCRIPTION AND FUNCTIONAL REQUIREMENTS (VER. 1, 19 JUN 2007)

The exemplar groups portals are intended as a source of authoritative and integrated taxonomic and diversity information about a taxonomic group, and an instrument to facilitate dissemination of new taxonomic research. Their content and organization as well as their functional requirements are described in this document. The focus is on the common features of the portals although the specific needs are mentioned.

Content

1. Users.
2. Basic organization.
3. Main uses of the site.
4. Content.
5. Functional requirements.
6. Mocks screenshots.

1. Users

Every person using the portal is an user. Upon registration, users will be able to access the editing tool.

2. Basic organization

The portal requires at least the pages shown in the table, but more pages may be added as the project develops:

PAGE	CONTENT	ACCESS BY:
Home	Introduction to the taxonomic group; links to relevant sites (e.g. EUNOPS for palms); news headlines; browsing tree (expandable/collapsible taxonomic classification); search form	button in main menu
About us	Project description and link to EDIT website; explanation of the data sources	button in main menu
Authors	List of authors with links to their individual page	button in main menu
Author page	Contact information, expertise, summary of contributions to the website	link in authors page
Names list	List of all taxon names alphabetically ordered. It should include valid taxa, synonyms, excluded taxa (and others – cultivars, hybrids?)	button in main menu
News	New content in the portal, etc.	link in main menu
Keys	List of keys (interactive or static) with links to access them	button in main menu
Valid taxon page	Taxonomic content (see more details below). One page per genus and species.	browsing, searching or links in higher taxon page or synonym page
Synonym page	Name with citations and reference to the valid taxon page. One page per synonym.	browsing, searching or links in higher taxon page or valid species page
Glossary	A list of terms with definitions (Diptera)	button in main menu
Archive	A form to search previous content by date or keyword	button in main menu
Download folder	A form to select data to download	buttons in main menu and taxon page

The items in the main menu may include among others:

- Home
- Names lists
- Keys
- Authors
- Register (changed to Mypage when author has logged-in)

- Log in (changes to Log out when author has logged-in)
- These items may also slightly vary among exemplar groups.

3. Main uses

Users will be able to:

- Retrieve information about a taxon by browsing or searching.
- Find out about the portal authors.
- Explore content by navigating through cross-linked information.
- Download information.
- Register/unregister and change personal data.
- Log in

4. Details of the content elements in a taxon page

The taxon pages will concentrate most of the content of the portal. Figure 1 below shows an example layout with important elements.

The content elements of a taxon page have two main features:

- they may have multiple sources stored in different places (e.g. different databases)
- most will consist of a combination of text, images and links to files, references and other online resources.

Content elements from all exemplar groups put together.

- Classification: links to the parent taxa (e.g. in higher rank levels)
- Nomenclature. Consists of:
 - Name
 - Complete nomenclatural reference. TDWG standards for abbreviations will be followed whenever possible although the system should be able to handle both abbreviated and full references.
 - Authors: as with the references, TDWG standards will be followed whenever possible and both abbreviated and full references will be considered.
 - Status
 - Type information: for names above the rank of species, the type is a species name; for names at and below the rank of species, the type is a specimen or an illustration. Information required: kind of type, designation, specimen information, locality, number, sex, depository references, links to type images from different online databases.
- Taxa lists.

The list of taxa should include:

 - Names accepted under a certain taxonomic concept at all ranks to subspecies level.
 - Hybrids (to be discussed. Hybrid parents are needed)
 - Cultivars (to be discussed)
 - Misapplied names. Can be entered with their respective sources. (maybe misapplied names should go somewhere else)
 - Excluded Taxa. (At all taxonomic levels).
 - Incertae sedis and taxa not sufficiently known.
 - Synonymy, specifying the type of synonymy (heterotypic vs. homotypic vs. unknown). The synonym lists should be sorted (homotypic synonyms grouped together and in chronological order).
- Protologue: whenever possible, as links in the nomenclatural references to scanned images.
- Description: the actual description of the taxon.
- Taxonomic discussion: generally, text discussing (1) taxonomic concept used, (2) inclusion and exclusion of taxa, (3) non-acceptance of taxa.
- Full taxonomic treatments: the taxonomic account as published (searchable text or downloadable PDF?)
- Distribution: it may be provided as a text description, TDWG units or both. It may include links to downloadable files (e.g. georeferenced data points), a reference and maps (published dot and grid maps). Ideally, user would be able to produce maps on the fly. It should also be possible to do regional contour map from the TDWG codes. The distribution description should include status information (e.g. endemic, native, etc).
- Conservation: a combination of text description and dynamic links to IUCN site.
- Phylogeny: may include a combination of links to relevant DBs (e.g. treebase), an image of a tree with a brief explanation and links to references.
- Molecular data: obtain from GenBank (webservice).
- Uses: content variable; text as well as illustrations of products; citation of historical sources.
- Ecology: content variable, ranging from autoecological descriptions to phytosociological data and habitat, including illustrations and photos, if available.
- Local names: in different character sets (Unicode).
- Other data: a flexible category to hold different subjects as needed. For example:
 - Name etymology.

- Anatomy and micromorphology: images and links to references.
- Palynology: images, preferably by links to databases (e.g. PalDat, Vienna).
- Cytology: preferably by links to databases (e.g. Watanabe, Japan), additionally photos and other illustrations of documented chromosome counts; maps on the distribution of cytotypes.
- Biology.
- Images: illustrations and photos of habit, morphological details, characteristic specimen, etc. All images must conform to a minimum set of metadata which should include keywords.
- Bibliography: a list of all references available for individual taxa.
- Keys: in different formats (static, downloadable, interactive). Preferably illustrated and with links to the glossary.
- Specimens: links to GBIF and other specimen databases., Also links to specimen-based DNA databases (e.g. BGBM).
- Alternative taxonomic concept: mostly references of that concept.
- Data sets: links to files with data sets such as population dynamics, life histories, etc.
- Work in progress: a list of ongoing projects. .
- Credits: a list of content contributors for the taxon (with links to individual pages) and other data sources for that taxon.

5. Layout of the taxon pages

The taxon pages will concentrate most of the content of the portal. Figure 1 below shows an example layout with important elements.

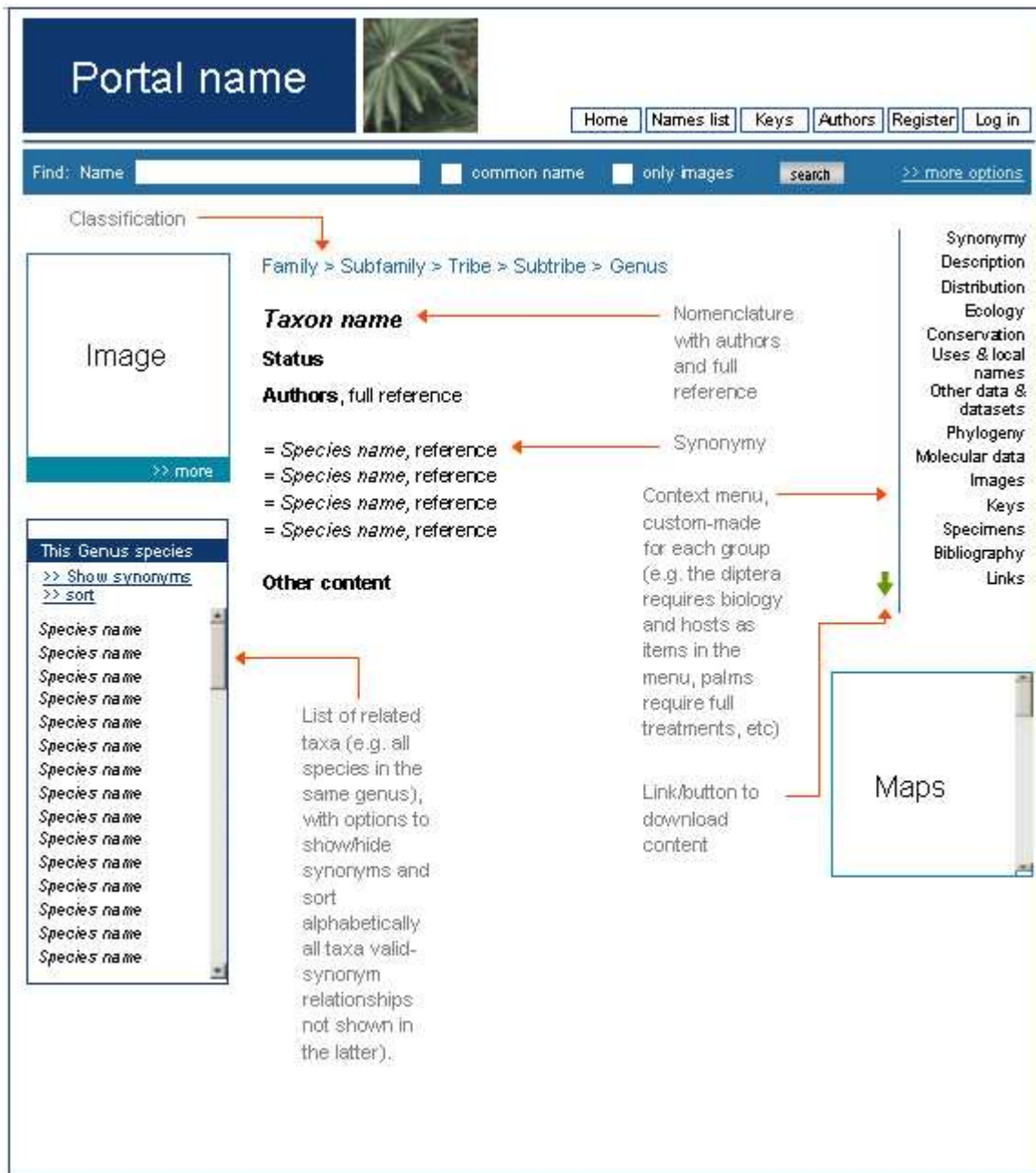


Figure 1 shows a screenshot with a possible layout of a taxon page.

6. Functional requirements

The functionality refers to the way the users interact with the portal and is described as a series of use cases that correspond to the main expected uses of the site.

6.1 Retrieve information about a taxon.

Browse the classification tree.

The user selects a taxon in the accepted classification, displayed as expandable/collapsible blocks with the nested hierarchy of parent-child taxa. The system goes to the selected taxon page.

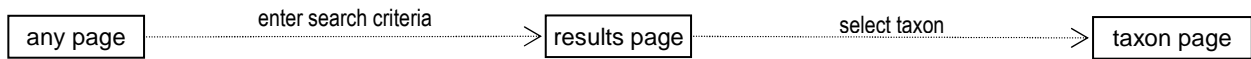


Search a taxon.

The user enters the search criteria. The application displays the result page: the list of taxa found indicating their status, with links to their individual pages. Wildcard characters will be allowed to search for partial words. The search fields may include:

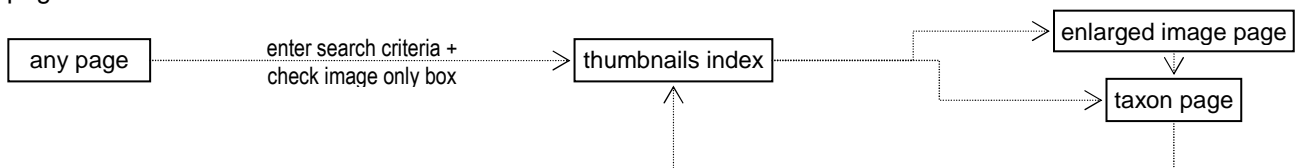
- Scientific name (text field)
- Local name (checkbox or text field)
- Locality (text field for locality names or TDWG codes)
- Free keyword (text field)
- Search image option (checkbox). See below.

Searches may be refined by combining criteria (e.g. scientific name + locality).



Search image gallery.

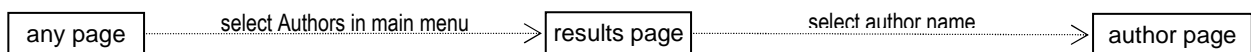
The user enter the search criteria and clicks the checkbox “only images” in the search bar. The system displays the results page: a thumbnail index with an option to show images according to type (i.e. photo, illustration, etc) or subject. From the thumbnail the user may go to the taxon page or to the enlarged image page which shows the image metadata. The images for that taxon may be also accessed from its taxon page.



6.2 Find out about the portal authors.

Browse the authors pages.

The user selects “Authors” from the main menu and the list of authors is displayed. The users selects ta name and the system opens the page for that author, which shows contact information, expertise and contributions to the website.



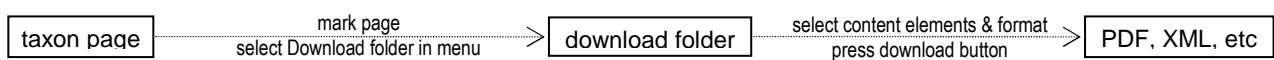
6.3 Explore content by navigating through cross-linked information

All citations in the text should be a link to the full reference and a pdf of that reference if it exists. All terms in the glossary should appear in the text as a link to that entry in the glossary.

6.4 Download content.

Download data for a taxon.

The user marks some content in the taxon for download. The content is added to a list in the download folder. In that folder the user may select the download format (text, pdf, xml, etc) and download the content marked by pressing a button. The download page may be accessed anytime from the in the taxon page.



6.5 Register/unregister

New member

The user selects register from the main menu. The system displays the registration form. The user enters the data including a username and submits the form. The system generates a password and sends it to the user by email.

Change personal data

The author selects Mypage in the menu and the system opens the form with the contact data and options to change the password and unregister.

6.6 Log in

After logging in, some menu items should change to reflect the options available to registered users (option to update content which are out of the scope of this document), including access to the tools in the cyberplatform. It is preferable to request log in only once and allow users to move between the cyberplatform and the portal.

7. Mocks screenshots

See below.

Home page:

group overview

search form (simple)


classification tree for browsing

news

find out about

other resources

Portal name



[Home](#)
[Names list](#)
[Keys](#)
[Authors](#)
[Register](#)
[Log in](#)

Find: Name
 common name
 only images

[>> more options](#)

pix

Taxonomic group overview

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.....

[>> more](#)

Find out about

The project

Data sources

Authors

How to participate

Other resources

Expert network webpage

Important website about the group

Other e-taxonomy projects

Browse classification

[>> Show synonyms](#)

- Calamoideae
- Nypoideae
- Coryphoideae
- Ceroxyloideae
- Arecoideae
 - Iniartheae
 - Chamaedoreeae
 - Cocoseae
 - Euterpeae
 - Arecaceae
 - Archontophoenicinae
 - Basselininae
 - Carpoxylinae
 - Dyspinae
 - Dypsis
 - Lemurophoemix
 - Mappiejva
 - Masoala
 - Linospadiicinae

Portal News

[>> all](#)

Changes in the species
..... 12 Jun 2007


New genus
.....
.....30 May 2007

Search result page:

list of found taxa

Option to refine the search with another field

Portal name



[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)

Find: Name
 common name only images
[new search](#)

Locality/TD/WG code
Keyword
[find in results set](#)

Names found

25 entries for name [see images](#)


<input type="checkbox"/>	Species name	authors	reference	accepted
<input type="checkbox"/>	Species name	authors	reference	accepted
<input type="checkbox"/>	Species name	authors	reference	synonym of <i>species name</i>
<input type="checkbox"/>	Species name	authors	reference	accepted
<input type="checkbox"/>	Species name	authors	reference	accepted
<input type="checkbox"/>	Species name	authors	reference	accepted
<input type="checkbox"/>	Species name	authors	reference	accepted
<input type="checkbox"/>	Species name	authors	reference	synonym of <i>species name</i>
<input type="checkbox"/>	Species name	authors	reference	synonym of <i>species name</i>
<input type="checkbox"/>	Species name	authors	reference	synonym of <i>species name</i>

Page 1 of 2
<< 1 2 >>

Search result page:

list of images found with thumbnails and running title

Option to narrow found set by selecting a subject, category or author

Portal name 

[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)






















Find: Name common name only images [new search](#)

Locality/TDWG code Keyword [find in results set](#)

Images found

70 images for


Refine search by: [Subject](#) [Morphology, habit, etc](#) [Category](#) [Photo, illustration](#) [Author](#)

						
Running title	Running title	Running title	Running title	Running title	Running title	Running title
						
Running title	Running title	Running title	Running title	Running title	Running title	Running title
						
Running title	Running title	Running title	Running title	Running title	Running title	Running title

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Enlarged image page

with image metadata

Portal name 

[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)

Find: Name common name only images [>> more options](#)



Enlarged image

Taxon name

Locality

Author

Date

Habitat
.....
.....

Notes
.....
.....
.....


Category

Subject

Copyright

[<< back to search results](#)

Keys page

Portal name 

[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)

Find: Name common name only images [>> more options](#)

Keys The interactive keys require Lucid viewer ([download free](#))

There 12 keys available.

 PDF  Interactive (requires Lucid player. [Get it here.](#)) Order by: [taxon name](#), [author type](#)


 Taxon name, author, reference
 Taxon name, author, reference
 Taxon name, author, reference

Page 1 of 1 << 1 >>

Authors page

list of authors
with
expandable
box for some
more details

Portal name



[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)

Find: Name
 common name
 only images

[>> more options](#)

Authors The content of the portal is maintained by the effort of authors with a broad range of expertise:

The portal has 30 authors

- AuthorName AuthorLastname
- AuthorName AuthorLastname
- AuthorName AuthorLastname
- AuthorName AuthorLastname
- AuthorName AuthorLastname
- AuthorName AuthorLastname
- AuthorName AuthorLastname
- AuthorName AuthorLastname
- AuthorName AuthorLastname
- AuthorName AuthorLastname

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<< 1 2 3 >>

How to contribute content to the portal.

After registering you will be able to login and submit content to the portal. Some content is sent to the editorial board, which is part of the expert network, and goes through a review process, while some other content is

incorporated immediately into the website. Every contribution can be commented by all members. Check the links below to find out more about contributing content.


[Instructions to authors](#)

[Register](#)

Authors page

list of authors
with contact
and
contribution
summary box
displayed

Portal name



[Home](#)
[Names list](#)
[Keys](#)
[Authors](#)
[Register](#)
[Log in](#)

Find: Name common name only images [>> more options](#)

Authors The content of the portal is maintained by the effort of authors with a broad range of expertise:

The portal has 30 authors

<p><input type="checkbox"/> AuthorName AuthorLastname</p> <p><i>Position, Institution</i></p> <p><i>Email (optional)....., Webpage.....</i></p> <p><input type="checkbox"/> AuthorName AuthorLastname</p> <p><input type="checkbox"/> AuthorName AuthorLastname</p> <p><input type="checkbox"/> AuthorName AuthorLastname</p> <p><input type="checkbox"/> AuthorName AuthorLastname</p> <p><input type="checkbox"/> AuthorName AuthorLastname</p> <p><input type="checkbox"/> AuthorName AuthorLastname</p> <p><input type="checkbox"/> AuthorName AuthorLastname</p> <p><input type="checkbox"/> AuthorName AuthorLastname</p> <p><input type="checkbox"/> AuthorName AuthorLastname</p>	<p>Summary of contributions from this author:</p> <p>3 Descriptions</p> <p>4 Taxonomy updates</p> <p>2 Content updates</p> <p>2 Data sets</p> <p>6 Images</p> <p>10 References</p> <p>Editorial board between Jun 07 and Dec 07.....</p> <p style="text-align: right;">see details</p>
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How to contribute content to the portal.

After registering you will be able to login and submit content to the portal. Some content is sent to the [editorial board](#), which is part of the [expert network](#), and goes through a [review process](#), while some other content is

incorporated immediately into the website. Every contribution can be commented by all members. Check the links below to find out more about contributing content.


[Instructions to authors](#)

[Register](#)

Author page

details of contributions by an author

Portal name



[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)

Find: Name
 common name only images

[>> more options](#)

Author: **AuthorName** *Position*

Institution

Email

Webpage

Descriptions/Revisions: 3

- [Genus name](#)
- [Species name](#)
- [Species name](#)

Taxonomy updates: 1

- [Species name](#): synonym moved as good species

Data sets: 2

- [Data set 1 title](#)
- [Data set 2 title](#)

Content updates: 3

- Distribution data for [Species name](#)
- Anatomy for [Species name](#)
-


Images: 5

- [Image 1 title](#)
- [Image 2 title](#)
- [Image 3 title](#)
- [Image 4 title](#)
- [Image 5 title](#)

Editorial board participation

- Jun 07 – Dec 07
-

Registration page

Portal name 

[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)

Find: Name common name only images [>> more options](#)

Register in the portalName

Registration will allow you to contribute content to the website and participate in the net work forums.

Name

Lastname

Position

Institution

email

webpage

expertise

Write the user name you prefer. It must not contain the characters..... You will receive your password by email in a few minutes.

username

Taxon page

Portal name

[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)

Find: Name common name only images [>> more options](#)



[>> more](#)

Family > Subfamily > Tribe > Subtribe > Genus

Taxon name

Status

Authors, full reference

= *Species name*, reference
= *Species name*, reference
= *Species name*, reference
= *Species name*, reference

Other content


This Genus species

[>> Show synonyms](#)

[>> sort](#)

Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name
Species name

- Synonymy
- Description
- Distribution
- Ecology
- Conservation
- Uses & local names
- Other data & datasets
- Phylogeny
- Molecular data
- Images
- Keys
- Specimens
- Bibliography
- Links



**Synonym
page**


Portal name 

[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)

Find: Name common name only images [>> more options](#)

Taxon name
Authors, full reference
This taxon is synonym of [this species](#)

Download folder

Portal name 

[Home](#) [Names list](#) [Keys](#) [Authors](#) [Register](#) [Log in](#)

Find: Name common name only images [>> more options](#)

Download folder

[Items to download](#)

- ↓ Description Species
- ↓ Distribution Species
- ↓ All content Species
- ↓ Images Genus
