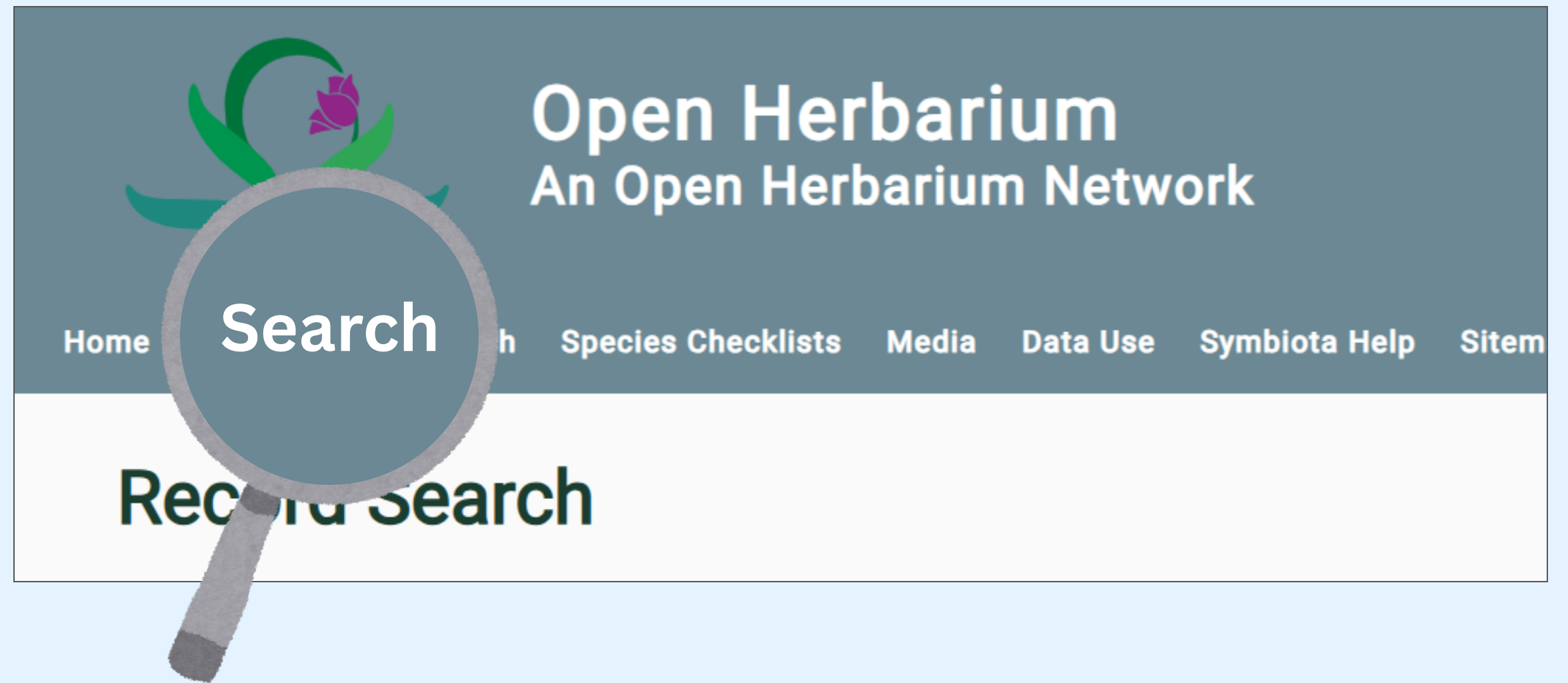


Exploring: Search



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Biodiversity Knowledge Sharing

Search



- “Search” lets users select records by **using text**, such as the name of a country, to select the desired records.
- This file is long because there are many options for searching by text.
- After each option is explained, try using it before moving to the next option.



Search – general remarks

- Clicking “Search” reveals a list of 7 categories that can be searched. Each category includes two or more fields that can be searched.
- Users **must** specify at least one value for one field in one of the categories, **but may** specify more than one value for several, or even all, fields in some or all categories.
- To search for more than one value within a field, separate the values with commas, for example, Country: “Pakistan, Bangladesh, Somaliland”.

Search Categories Overview



Record Search

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LOCALITY

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SAMPLE PROPERTIES

ASSOCIATIONS

COLLECTIONS

Results Display Format

☒ List

☐ Table

SEARCH

RESET

Criteria

Include Synonyms X

Include other IDs X

Associations-Include Synonyms X

All Collections X

Taxon: Scientific name X

Associations- Not Specified X

Associations-Taxon type: Scientific name X

Categories used to organize the searchable fields

- The searchable fields are grouped into 8 categories.
- To see the fields in a category, click the down arrow in its box.
- View search results in either “List” or “table” format.
 - As part of your exploration, view your search results in both formats by selecting first one button then the other.




Taxonomy (name) category

- This category allows for searching by an organism's **name**.
- By default, the search will be of scientific names. The names autocomplete **if** it is in the site's taxon table.
 - If the name does not autocomplete, first check what you entered (it is easy to make mistakes).
 - If that is not the answer, send an email to Mary with the name and where you came across it.
- By default, searching by a scientific name will also select records that use synonyms of the name.
- Searching on local/common names in any language may be possible, but very few have been entered. Most “local” names in the two sites are in English.

Locality – Administrative regions



- The locality category has five fields. The first three refer to administrative regions. The name of some fields reflect terms used in the US.
- Country – Admin level 1. Note: The OpenSites treat Somaliland and Somalia as separate countries.
- State – Admin level 2, the political division below country. Examples of terms used: State (US), Province (Pakistan), Region (Somaliland), Division (Bangladesh).
- County – Admin level 3, the political division below Admin level 2. Examples: County (US), District (Somaliland, Bangladesh).
 - For Pakistan, Districts are treated as level 3 because it is the level below Province used by most collectors.

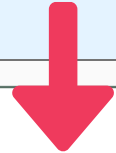


LOCALITY		
Country	Locality/Localities	
State	Minimum Elevation	Maximum Elevation
County		

Locality – Other fields



- Locality/Localities: The search will be for words in the locality field of each record. Search on well-known features, such as the name of a village, mountain, or cultural feature.
- Minimum and Maximum elevation: USE METERS, not feet, in this field.
- NOTES
 - Somaliland and Somalia are treated as separate countries on the OpenSites.
 - For Pakistan, Admin level 3 are the Districts, not Divisions, because collectors frequently name the District, rarely the Division.



LOCALITY		
Country	Locality/Localities	
State	Minimum Elevation	Maximum Elevation
County		

Latitude & Longitude - 1



The "Search" tab offers three methods for searching by latitude and longitude

Method 1: Bounding Box

- Select a “square” defined by lines of latitude and longitude.
- The first two boxes are for the most northern and southern latitudes.
- The next two boxes are for the most western and eastern longitudes.
- Specifying the hemisphere of each line is essential. Each pair of lines will be in the same hemisphere unless the area crosses the equator (latitudes in different hemisphere) or prime meridian (longitudes in different hemispheres).

Bounding Box

SELECT IN MAP (BB)

Northern Latitude

Values between -90 and 90.

Select N/S



Southern Latitude

Select N/S



Western Longitude

Select W/E



Eastern Longitude

Select W/E



Latitude & Longitude - 2



Method 2: WKT

WKT stands for “Well Known Text”.

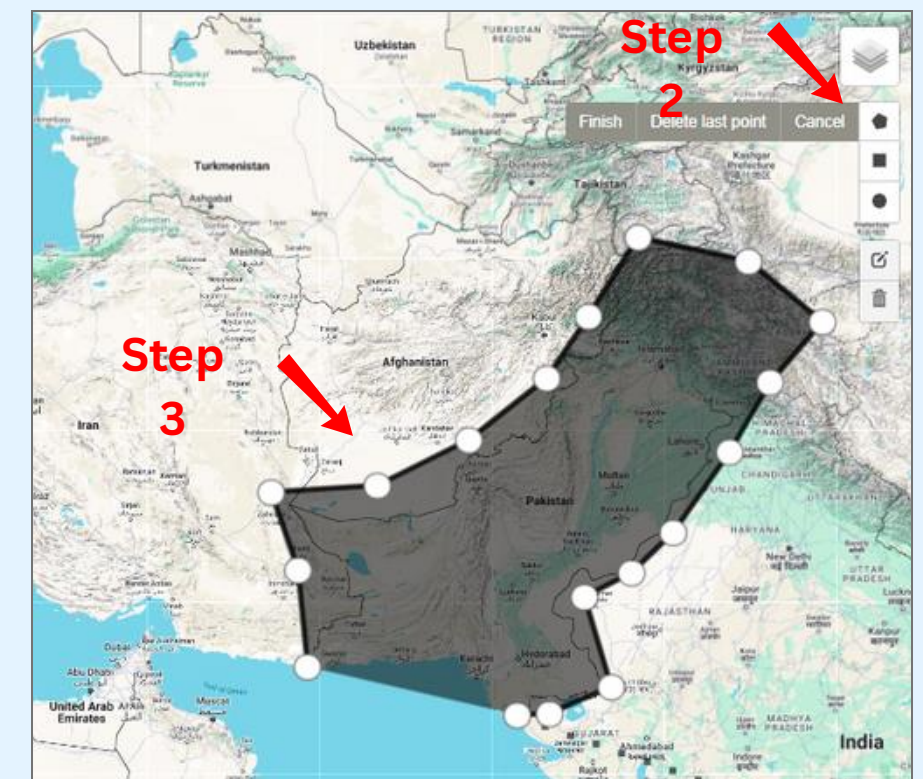
- Click the “Select in map” button and scroll to the part of the map that interests you.
- Select the desired shape from the 3 buttons on the right.
- For a polygon, define the area that interests you by clicking each corner. Close the polygon by clicking the first point again after clicking the other points around the perimeter.

Polygon (WKT footprint)

SELECT IN MAP (POLYGON)

Polygon

Step
1



Latitude & Longitude - 3



Method 3: Point-Radius

The Point-radius method selects records located inside a circular area defined by the user.

- Enter the latitude and longitude of the center point in the appropriate boxes.
- Identify the hemisphere for each coordinate (N/S or W/E).
- Enter the radius of the desired circle in the appropriate box.
- Select the unit of measurement to use (kilometers or miles).

Point-Radius

SELECT IN MAP (PR)

Latitude

Select N/S

Longitude

Select W/E

Radius

Select Unit



Collecting event

There are four fields. They are straight forward BUT

- **Dates:** It is best to use the standard international format: YYYY-MM-DD. 22 May 2025 is also allowed.
 - Do not use 1/5/24. Computers may interpret the first digit as the MONTH (i.e., US style), not the day (as in most countries). How humans interpret it is unpredictable.
- **Collector's Last Name:** The last name of the collector. If more than one collector is listed, it is the last name of the first person listed.
- **Collector's Number:** If available, enter it. Unfortunately, many collectors do not include a record number with their specimens, even for plant specimens. There is nothing that can be done about past records. Make sure you include a record number with YOUR specimens.

Sample properties



- This category allows users to select records by their catalog (barcode) number as well as by a few specific features. These features are:
 - Whether they are the type of a name (this is a formal, nomenclatural status)
 - Whether they are linked to an image
 - Whether they are linked to an audio file
 - Whether they are linked to genetic data
 - Whether they include geographic coordinates
 - Whether the source organism was in cultivation (plants, fungi, and algae) or captive (animals)

Associations



The Association tab has not been used (yet) for any records on the OpenSites. They must first be defined at the portal level. The following information is for those who are curious.

- Associations are used when a specimen was associated with another organism, whether or not that organism is represented by a specimen.
- Associations may be specific, for example: parasite of/host of, pollinator or/pollinated by, prey of/predator of. The data should state which the record is ofm
- Associations may be vague: Specimen A found on species B; or Specimen A collected with species x, y, & z when shrub of species B was beaten.
 - One could just list x, y, z and B as associated taxa but making them part of a defined association provides more information.

Collections



By default, ALL collections will be included in a search but often users are only interested in records from some of the collections.

- Decision 1: Include all records or only specimen-based records or only records based on observations, image-based records, or reports (all are treated as observation-based records by the OpenSites).
- Within both the specimen-based and observation-based records, the collections may be divided into geographic regions.



Collections - 2

In OpenHerbarium, the geographic regions are:

- Africa, including Seychelles and other West Indian Ocean Islands
- Asia – Pakistan
- Asia – not Pakistan
- Global

In OpenZooMuseum, the collections are not divided into geographic regions.