

ESTABLISHMENT OF A NATIONAL WORKING GROUP FOR USING SPECIFY SOFTWARE FOR MANAGEMENT OF ZOOLOGICAL COLLECTIONS AND SPECIMEN DATA

Based on session discussions at the Foundational Biodiversity Information programme and Biodiversity Information Management Forum,

12 May 2016

Contact: Michelle Hamer: M.Hamer@sanbi.org.za

Background

A range of software is currently used for managing collection and specimen data for animals in South Africa. This creates a number of challenges in terms of standards and completeness of data, interoperability between data sets, risks in terms of data security, and poor links between specimens and associated information such as images, data sheets and different components of collections.

Specify has been identified as an appropriate software for managing zoological data in South Africa. This is open source software which is offered by the University of Kansas. Details about the software are available at <http://specifyx.specifysoftware.org/>.

There are currently several collection institutions that have implemented Specify as the software for managing their data, including SAIAB, Iziko Museum for their natural science collections, Albany Museum, National Zoological Garden for their biobank, and selected collections in other institutions (bees at ARC, mammals, entomology and invertebrates at Ditsong, Entomology at KZN Museum, amphibian collection at North West University).

Some of the challenges with implementing the use of Specify at other institutions were identified at the FBIP – BIM Forum as follows:

1. Capacity – training is needed for collections staff and researchers on how to use Specify
2. Capacity – to provide support for setting up the database, for problem solving and for migrating data
3. Understanding of how to use the database to manage the collections – needs careful thought and planning with capacity needs considered
4. Support from both management and staff at an institution is necessary for implementation
5. Implementation of new software results in a decline in productivity while staff learn how to use the new software
6. Some institutions have invested in developing their own database structures
7. Specify is not suitable for all types of data.

The first three challenges can be addressed by establishing a national working group, which will pool expertise and other resources. Addressing challenges in a collaborative way may also contribute to resolving challenges 4 and 5.

Action plan to implement Specify nationally:

OBJECTIVE	ACTION	RESONSIBLE	TIMEFRAME	RESOURCES
1. Develop capacity of collections staff and researchers to use Specify	4 day training course	Michelle Hamer to organise Willem Coetzer, Albe Bosman, Burgert Muller, Kim Labuscagne, John Midgely to assist with training. May consider asking for advanced training from Andrew Bentley at University of Kansas if this is required.	September 2016 (to be repeated each year)	Venue to be decided Catering, travel costs for participants to be covered by FBIP for 2016
2. Assistance with setting up Specify databases	Web-based databases (Specify 7) to be set up on SAIAB server	Willem Coetzer to assist with this –	On request	None but may need to review depending on demand
3. Assistance and general support for problem-solving for using Specify	Establish a support group where experts can be contacted for assistance			
	Online resource – with Frequently asked questions; links to Helpcasts on Specify website for users to consult before contacting experts for assistance; contact details of experts	Abe Bosman to set this up; Willing experts to provide their contact details and respond to online and e-mail queries from users	Set up and functional by October 2016	None but may need to review depending on demand
4. Establish a Specify Working Group to promote the use of Specify, and deal with issues at a national level	Meetings of main users to ensure implementation of plan and activities at national level (virtual meetings unless opportunity for face-to-face meeting)	Michelle Hamer to organise; representatives from main institutions to participate	Quarterly meetings – virtual – Pretoria and Cape Town, with Skype connections to other centers. First meeting at training session in September 2016.	To be determined
5. Migrate data from existing software to	Assess extent of data sets that need to be	Willem Coetzer and Michelle	By end December	None

Specify	migrated to Specify	Hamer	2016	
	Data migration	Consultants	2017 – but depending on availability of funds	Funds to be sourced

Other considerations:

- Digital asset management and what this involves
- General data workflows needed including data publishing, accessibility, data cleaning, quality control and improvement)
- Species page management
- Population abundance data
