

## Exporting Data for Specify Insight

### iPad Exporter

Take your collection with you! The Specify team is proud to announce the unveiling of the Specify Insight iPad application.

Getting your collection onto the iPad involves 6 steps:

1. Assign ISO codes using the ISO Assignment Tool.
2. Create a Specify Cloud Account
3. Configure your Collection Information for exporting
4. Export your collection data to the Specify cloud
5. Download Specify Insight onto your iPad from the Apple App Store
6. Import your collection data into the iPad

Interacting with the Specify cloud account, configuring the collection information and exporting the collection data are accomplished in the iPad Exporter tool within Specify. Documentation for importing collection data into the iPad can be found in a separate document titled, *Specify Insight Setup Overview*.

**Note:** Specify Insight works on all iPad generations *EXCEPT* the iPad 1.

From within the Specify 6 application, Choose *System > iPad Exporter*

The steps required to export collection data vary depending on whether data is being exported for the first time or is an updated export.

Initial data export steps:

1. Create a Specify Cloud Account (if another collection within your institution has exported data then you simply need to *Login* to the account rather than *Create* it.)
2. Configure Collection Export
3. Export Data

Steps to Update collection data:

1. Login to your institution's Specify cloud account
2. Export Data

## Initial Data Export

### 1. Create a Specify Cloud Account

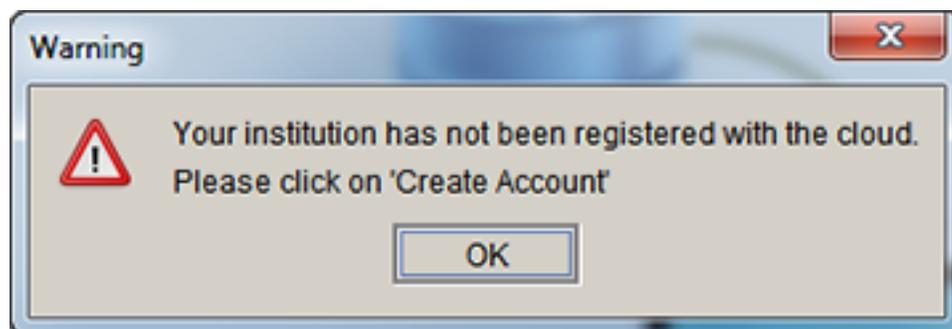
Specify utilizes the cloud to store collection data for each institution, which then allows the iPad to access and import the data. The account for the Specify cloud space is identified by the institution's Global Unique Identifier (GUID) within Specify. Therefore, if collections within your institution use separate databases, each with unique GUID codes for the institution, your institution will require a separate Specify cloud account for each of the databases. If collections within your institution use separate databases, but the same GUID code is used to identify the institution, then each of the collections will store their data files in the same Specify cloud account.

If you have several collections within a single database, each of the collections will store their data files in a single Specify cloud account.

**Note:** The GUID code for your institution can be found on the Institution form. To open the Institution form click *System > System Setup > Configuration*, then choose *Institution* in the sidebar. The GUID is displayed in the *GUID* field on the form.

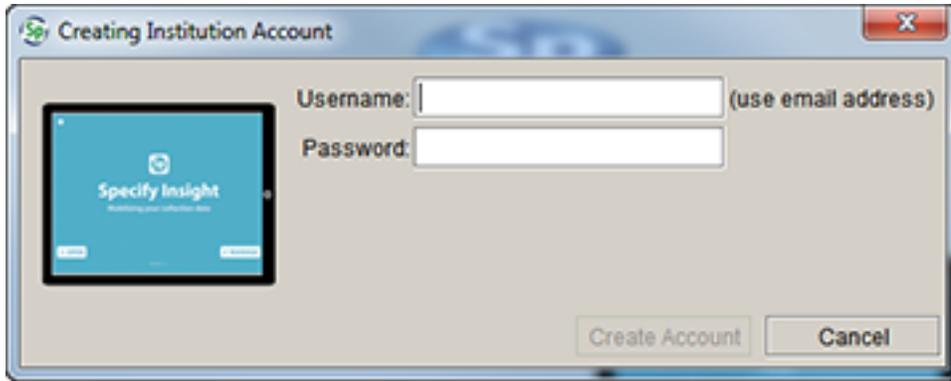
Choose *System > iPad Exporter* to open the iPad Export tool.

If your institution does not have a Specify cloud account a warning will display.



*Specify cloud account warning.*

If you see this message click **Create Account** in the sidebar menu.



*Create Specify cloud account.*

Type in a **Username**. The username needs to be unique for the entire cloud, therefore we require it to be in the format of an email address: 'name'@'institution'. The email address is not used for any other purpose and is not required to be an actual email account - it is simply a name in the form of an email that you are creating as you type. An example email might be, *entomology@ku.edu*, as it is both meaningful and unique.

**Note:** each institution may have as many users as they wish. To create a new user click the [Login](#) button.

Type in a **Password** and click **Create Account**.

## 2. Configure Collection Export

Click Configure Collection Export on the sidebar menu if it does not open automatically.

*Collection Information for iPad Export*

The Collection Information Export tool displays the information required by the Specify Insight iPad application. The fields within this tool are automatically filled-in based on the information in the database, but can be changed.

**Note:** changes to the Institution Name will be reflected in the Institution table in Specify.

**Name** is the name of your institution.

**Curator** is the name of the curator

**Collection Manager** is the name of the person who manages the collection.

**Attachment Source** refers to the server location of the attachments for the collection. If you are utilizing an Attachment Manager or using Direct URL, type in the url for these locations.

If you are not using either of these sources for your attachments, simply leave the text box blank.

**Note:** if you are not storing your attachments on a server via an Attachment Manager or Direct URL they will not be available for display within the Specify Insight iPad application.

Click the  (edit) icon to **Choose a Picture** to display on the Collection Information screen within the Specify Insight iPad application.

**Clear Picture** will delete the current picture.

### 3. Export Data

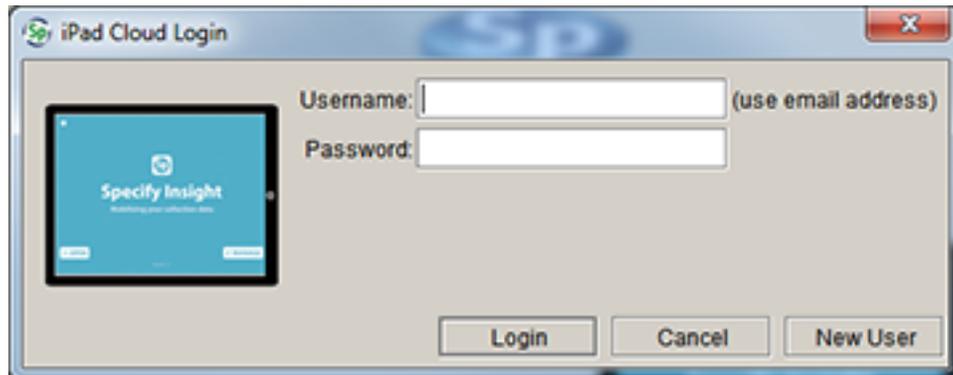
Click the **Export to iPad** button.

**Logout** to logout of the Specify cloud.

### Update Collection Data

#### 1. Login

Click **Login** on the sidebar menu.



*Login to Specify Insight Cloud*

Enter the **Username** and **Password** for your institution's Specify cloud account.

Or

If you prefer to use your own Username and Password simply type in your new Username and Password and click the **New User** button.

**Note:** The username needs to be unique for the entire cloud, therefore we require it to be in the format of an email address: 'name'@'institution'. The email address is not used for any other purpose and is not required to be an actual email account - it is simply a name in the form of an email that you are creating as you type. An example email might be, *entomology@ku.edu*, as it is both meaningful and unique.

2. Click the **Export to iPad** button in the workspace.

3. Click **Logout** to logout of the Specify cloud.