

Managing ISO Codes in Specify

The Institutional Organization for Standardization (ISO) has assigned unique codes for political/geographical boundaries. The new Specify Insight iPad application utilizes these codes when summarizing and displaying geographical data, and assigning these codes to your collection is the first necessary step in exporting data for Specify Insight. Without proper ISO Codes the information displayed within Specify Insight will not be complete or possibly correct.

The ISO tool assigns codes to geography trees, which are shared within a Discipline. When the ISO tool is run and ISO codes are assigned, the changes will be reflected in the geography tree for each Collection within the Discipline; therefore, the ISO codes only need to be run once per Discipline.

The ISO Assignment tool is opened by clicking: *System > ISO Tools*.

Note: the ISO Assignment tool is only accessible to Admin users.

The sidebar offers three actions:

1. Assign ISO Codes
2. Clear ISO Codes
3. ISO Reference

1. Assign ISO Codes

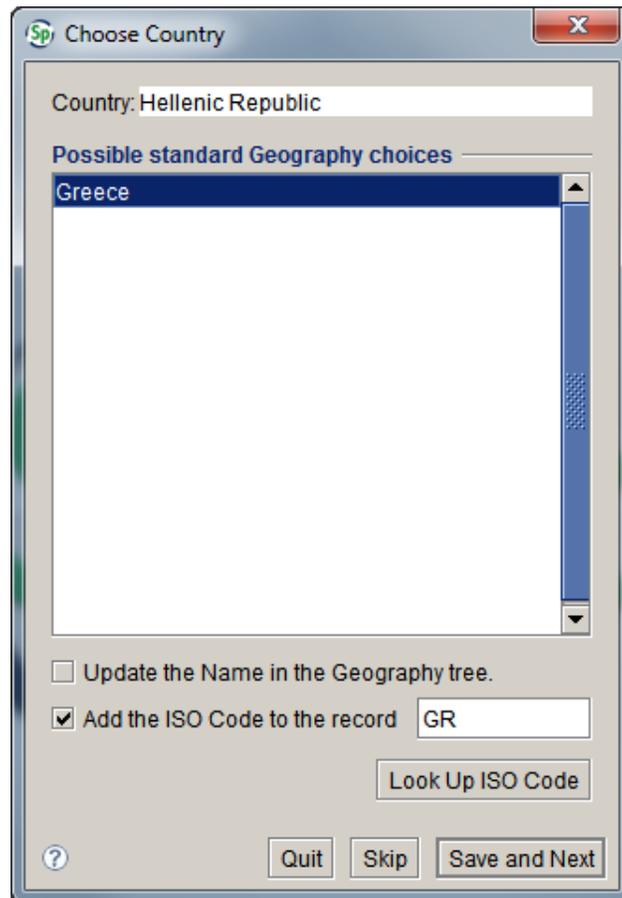
Specify utilizes the geographic information provided by geonames.org to automatically match the standardized names of continent, country, and US State names within the geography tree with these standard ISO codes.

- Continents: 2-letter code
- Countries: 2-letter code
- US States: country code + state code

Once Specify automatically assigns ISO codes to the standard names in the geography tree you will be prompted to hand assign any non-standard names. This provides the opportunity to standardize the geography names used in the collection and clean up any names that are misspelled. For example, the standard geography name for the United States of America is 'United States'. If it has been entered into the geography tree as 'US of A', 'USA', and 'United States' - all representing the same country - the tool will automatically assign 'United States' an ISO code of 'US', but will present 'US of A,' and 'USA' for individual assignment. Since all three examples represent the same country in the geography tree they should each be assigned the same ISO code of 'US'.

Click *Assign ISO Codes* from within the sidebar to open it.

Note: If all geographic entities within the geography tree are assigned ISO codes a message will appear stating that the selected geography is up to date, and the ISO assignment tool will not open.



Assign ISO Codes

Specify will automatically assign ISO codes for all standard continents, countries, and US states within the geography tree. Any non-standard names will be presented for hand choosing a code:

Continent/Country/State refers to rank of the geographic entity not found and displays the name.

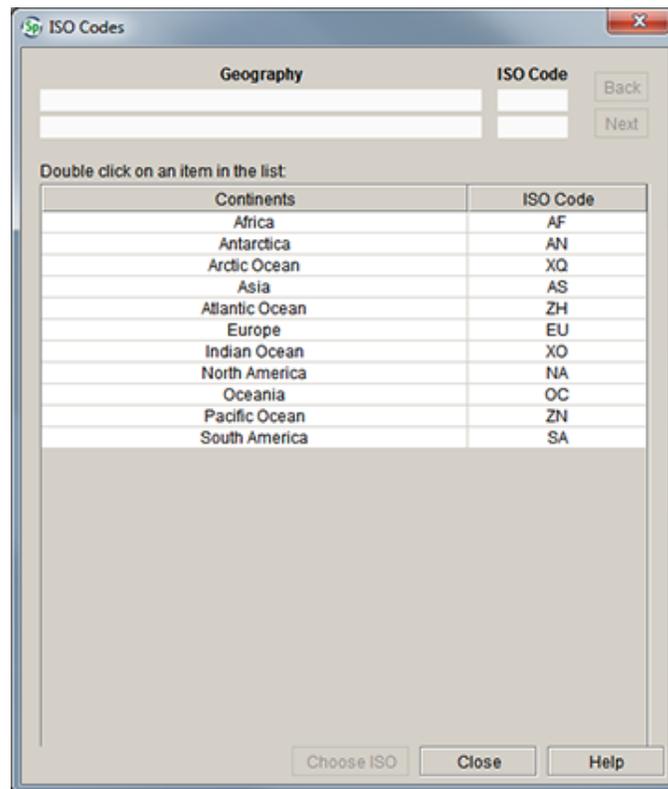
Possible Standard Geography choices offers a suggestion for the standard geographic name.

Update the Name in the Geography tree allows the changes made within the tool to change the name in the geography tree. In the example above 'US' and 'USA' would be changed to 'United States'.

Note: the names will only be changed in the geography tree, they will not be merged.

Add the ISO Code to the record offers a text box for entering an ISO code and allows the ISO code to be assigned.

Look Up ISO Code allows you to step-through standard Continent, Country and US State names to find correct ISO codes.



ISO Code Table

Double-Click on a Geography name to select it and open the next level/rank of geography.

Quit will close the ISO Code dialog and create a report of all changes.

Note: it is possible to stop hand assigning ISO codes before the entire geography tree is complete. All hand assigned ISO codes will be saved, and the next time the tool is opened it will continue from the last unsaved geography in the geography tree.

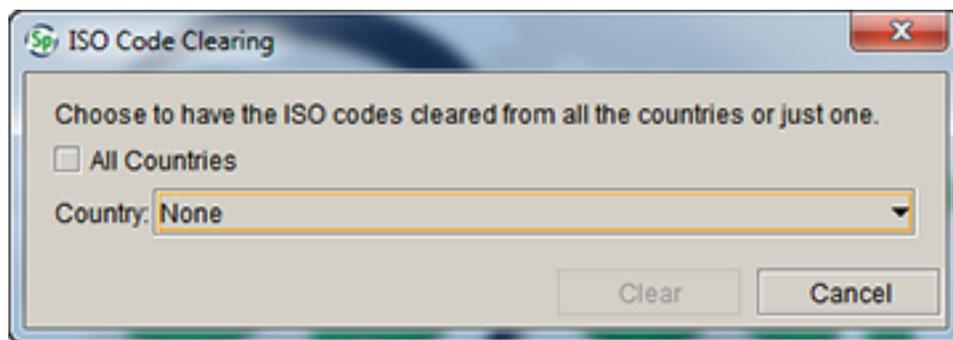
Skip will skip the current geographic entity.

Save and Next saves the current ISO code and steps to the next unassigned geographic entity. After the last ISO code has been assigned Specify will create a report of all changes and display it in a browser window.

2. Clear ISO Codes

This will clear all ISO codes within the geography tree for all countries or individual countries.

Click *Clear ISO Codes* from the sidebar menu to open the tool.



Clear ISO Codes

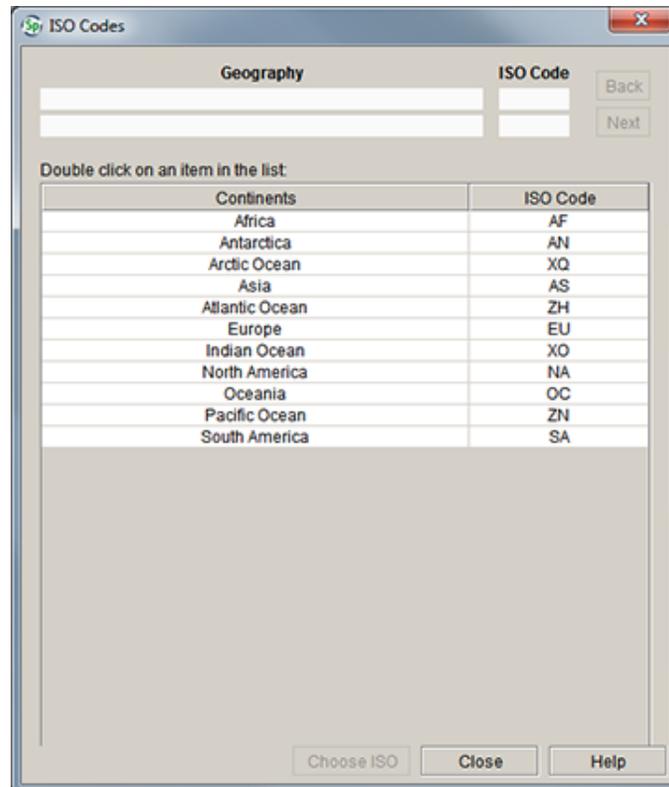
Check the **All Countries** box to clear all ISO codes within the geography tree or select a single **Country** from the drop-down menu to clear only the ISO code for that country.

Note: Selecting United States from the drop-down will clear all ISO codes for the US states.

3. ISO Reference

The ISO Reference displays the standard geographical name and its ISO code referenced within Specify. It is the same ISO reference tool utilized in the ISO Assignment Tool.

Click *ISO Reference* from the sidebar menu to open the tool.



ISO Code Table

Double-Click on a Geography name to select it and open the next level of geography or:

1. choose a geographic entity
2. click the **Next** button

Note: Oceans do not have any ranks below continent.

Click the **Back** button to return to a higher level within the geography tree.