



Module 3

Customizing Specify



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Editing the Schema & Forms



Terminology

XML, or Extensible Markup Language, is a markup language and file format used for storing, transmitting, and reconstructing data.

This is the language that Specify's forms are written in.

CO CollectionObject

← CollectionObject  Show Data Model Field Names

```
1 <viewdef type="form" name="Collection Object" class="edu.ku
2 <desc>The Collection Object form.</desc>
3 <enableRules/>
4 <columnDef>100px,2px,195px,5px,86px,2px,210px,5px,74px,2px
5 <columnDef os="lnx">115px,2px,195px,5px,125px,2px,210px,5px
6 <columnDef os="mac">130px,2px,215px,5px,138px,2px,260px,5px
7 <columnDef os="exp">p,2px,min(p;220px),5px:g,p,2px,p,5px:
8 <rowDef auto="true" cell="p" sep="2px"/>
9 <rows>
10 <row>
11 <cell type="label" labelfor="1"/>
12 <cell type="field" id="1" name="catalogNumber" uitype="qu
13 <cell type="label" labelfor="3"/>
14 <cell type="field" id="3" name="accession" uitype="qu
15 <cell type="label" labelfor="100"/>
16 <cell type="field" id="100" name="altCatalogNumber" u
17 </row>
18 <row>
19 <cell type="label" labelfor="4"/>
20 <cell type="field" id="4" name="cataloger" uitype="qu
21 <cell type="label" labelfor="5"/>
22 <cell type="field" id="5" uitype="plugin" name="this"
23 </row>
24 <row>
```

Cat #

Cataloger

▼ Determinations + —

No Data.

Field No: Locality

Terminology

- **Form definition**: App resource that is created and stored at a level in the app resources hierarchy.
- **View definition**: This is the definition of a particular table within a complete form definition. Each table can have one or more view definitions.
 - **For example**, a form definition can include multiple view definitions under a single table (such as Collection Object).

Resources

Form Definitions

App Resources



Global Resources (0)

Discipline Resources (4)

Ichthyology (4)

+ Add Resource

KU Fish Observation Collection (1)

KU Fish Teaching Collection (1)

KU Fish Tissue Collection (1)

KU Fish Voucher Collection (1)

fish.views

+ Add Resource

User Accounts (0)

fish.views

Address (1)

Agent (1)

Borrow (1)

Borrow Material (1)

Collecting Event (1)

Collecting Event Attr

Collecting Trip (2)

Collection Object (2)

Collection Object Attr

Collection Object Cit

Determination (2)

fish.views

Collection Object

← Tables

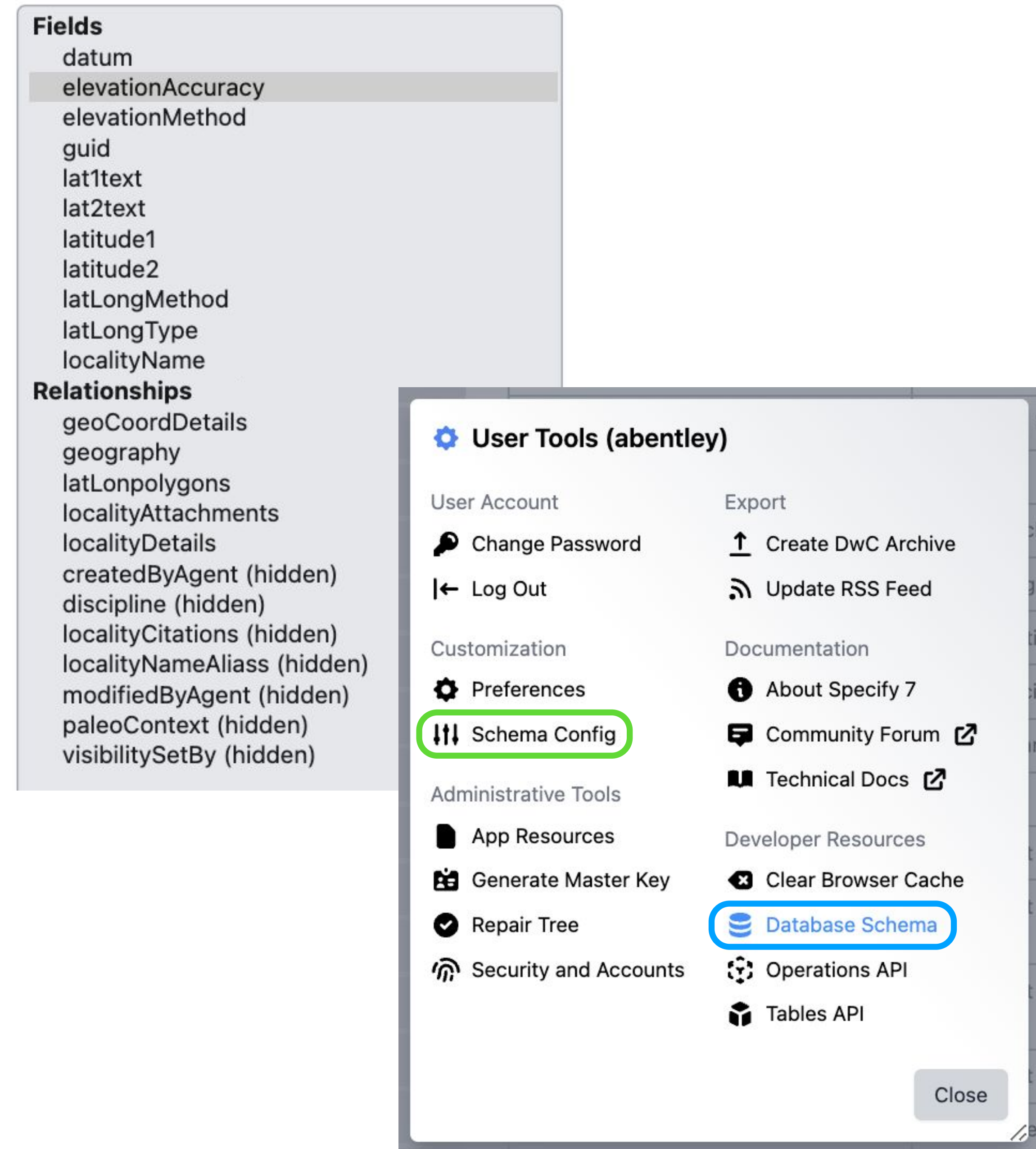
CollectionObject

CollectionObjectSub

Create

Terminology

- **Specify (data model) fields:** The Specify field names, also known as data model field names, are the ones defined within the application's **interface schema**.
 - These fields can be viewed within Specify by going to the **Schema Config** interface or by using the **Database Schema** viewer, both accessible in the User Tools menu.



Terminology

- **Schema Config**

- The Specify "interface schema" refers to the data tables and fields.

- Every field has the following:

- Caption (also referred to as the 'label')
- Description
- Field length
- Field type

- You can configure which fields are "required" or "hidden"

Schema Config (English)

Change Base Table

Save

Table: collectionobject

Fields

Field: catalogNumber

Caption

Collection Object

Description

A general term for anything that can be a part of your collection: a specimen, a specimen lot, a sound recording, a slide, a tissue, an extract, or a spectrogram. test

Table Format

CollectionObject

Table Aggregation

CollectionObject

Uniqueness Rules

☐ Hide Table

Fields

altCatalogNumber
catalogedDate
catalogNumber
fieldNumber
guid
projectNumber
remarks
reservedText
reservedText2
text1
text2
timestampModified
availability (hidden)
catalogedDatePrecision (hidden)
catalogedDateVerbatim (hidden)
collectionMemberId (hidden)
countAmt (hidden)
date1 (hidden)
date1Precision (hidden)
deaccessioned (hidden)
description (hidden)
embargoReason (hidden)
embargoReleaseDate (hidden)
embargoReleaseDatePrecision (hidden)
embargoStartDate (hidden)
embargoStartDatePrecision (hidden)
integer1 (hidden)
integer2 (hidden)
inventoryDate (hidden)
inventoryDatePrecision (hidden)
modifier (hidden)

Relationships

accession
cataloger
collectingEvent
collection
collectionObjectAttachments
collectionObjectAttribute

Field: catalogNumber

Caption

Cat #

Description

Catalog Number

Length

32

Type

String

☐ Hide Field

☐ Is Required

Field Format

☐ None

☒ Formatted CatalogNumberNum

☐ Web Link None

☐ Pick List None

☒ Sort by hidden fields

Terminology

- This is where a field's format can be set.
 - Formatted fields are structured using a set "format" (e.g. KU-####-ABC) when validating the field value during data entry
 - Pick list are a controlled vocabulary of terms
- Any changes to the Specify schema will impact all collections within a **discipline**.

Schema Config (English)Change Base TableSave

Table: collectionobject

Fields

Field: catalogNumber

CaptionCollection Object

DescriptionA general term for anything that can be a part of your collection: a specimen, a specimen lot, a sound recording, a slide, a tissue, an extract, or a spectrogram. test

Table FormatCollectionObject

Table AggregationCollectionObject

Uniqueness Rules

☐ Hide Table

Fields

altCatalogNumber
catalogedDate
catalogNumber
fieldNumber
guid
projectNumber
remarks
reservedText
reservedText2
text1
text2
timestampModified
availability (hidden)
catalogedDatePrecision (hidden)
catalogedDateVerbatim (hidden)
collectionMemberId (hidden)
countAmt (hidden)
date1 (hidden)
date1Precision (hidden)
deaccessioned (hidden)
description (hidden)
embargoReason (hidden)
embargoReleaseDate (hidden)
embargoReleaseDatePrecision (hidden)
embargoStartDate (hidden)
embargoStartDatePrecision (hidden)
integer1 (hidden)
integer2 (hidden)
inventoryDate (hidden)
inventoryDatePrecision (hidden)
modifier (hidden)

Relationships

accession
cataloger
collectingEvent
collection
collectionObjectAttachments
collectionObjectAttribute

Field: catalogNumber

CaptionCat #

DescriptionCatalog Number

Length32

TypeString

☐ Hide Field

☐ Is Required

Field Format

☒ FormattedCatalogNumberNum

☐ Web LinkNone

☐ Pick ListNone

☒ Sort by hidden fields

Terminology

- There are **literal fields** (shown under the “Fields” header) which exist within the current table.
- There are **relationship fields** (shown under the “Relationships” header) which link the table to another table.

Schema Config (English)Change Base TableSave

Table: collectionobject

Fields

Field: catalogNumber

CaptionCollection Object

DescriptionA general term for anything that can be a part of your collection: a specimen, a specimen lot, a sound recording, a slide, a tissue, an extract, or a spectrogram. test

Table FormatCollectionObject

Table AggregationCollectionObject

Uniqueness Rules

☐ Hide Table

Fields

altCatalogNumber
catalogedDate
catalogNumber
fieldNumber
guid
projectNumber
remarks
reservedText
reservedText2
text1
text2
timestampModified
availability (hidden)
catalogedDatePrecision (hidden)
catalogedDateVerbatim (hidden)
collectionMemberId (hidden)
countAmt (hidden)
date1 (hidden)
date1Precision (hidden)
deaccessioned (hidden)
description (hidden)
embargoReason (hidden)
embargoReleaseDate (hidden)
embargoReleaseDatePrecision (hidden)
embargoStartDate (hidden)
embargoStartDatePrecision (hidden)
integer1 (hidden)
integer2 (hidden)
inventoryDate (hidden)
inventoryDatePrecision (hidden)
modifier (hidden)

Relationships

accession
cataloger
collectingEvent
collection
collectionObjectAttachments
collectionObjectAttribute

Field: catalogNumber

CaptionCat #

DescriptionCatalog Number

Length32

TypeString

☐ Hide Field

☐ Is Required

Field Format

☒ FormattedCatalogNumberNum

☐ Web LinkNone

☐ Pick ListNone

☒ Sort by hidden fields

There are **virtual fields**, or calculated fields, are system fields that exist outside the data model and cannot be viewed in the Schema Config.

Collection Object

Current Determination
Total Items
Total Current Items

Preparation

Actual Count Amount
Is On Loan

Loan

Total Preps, Items
Unresolved, Resolved Preps
Unresolved, Resolved Items

Accession

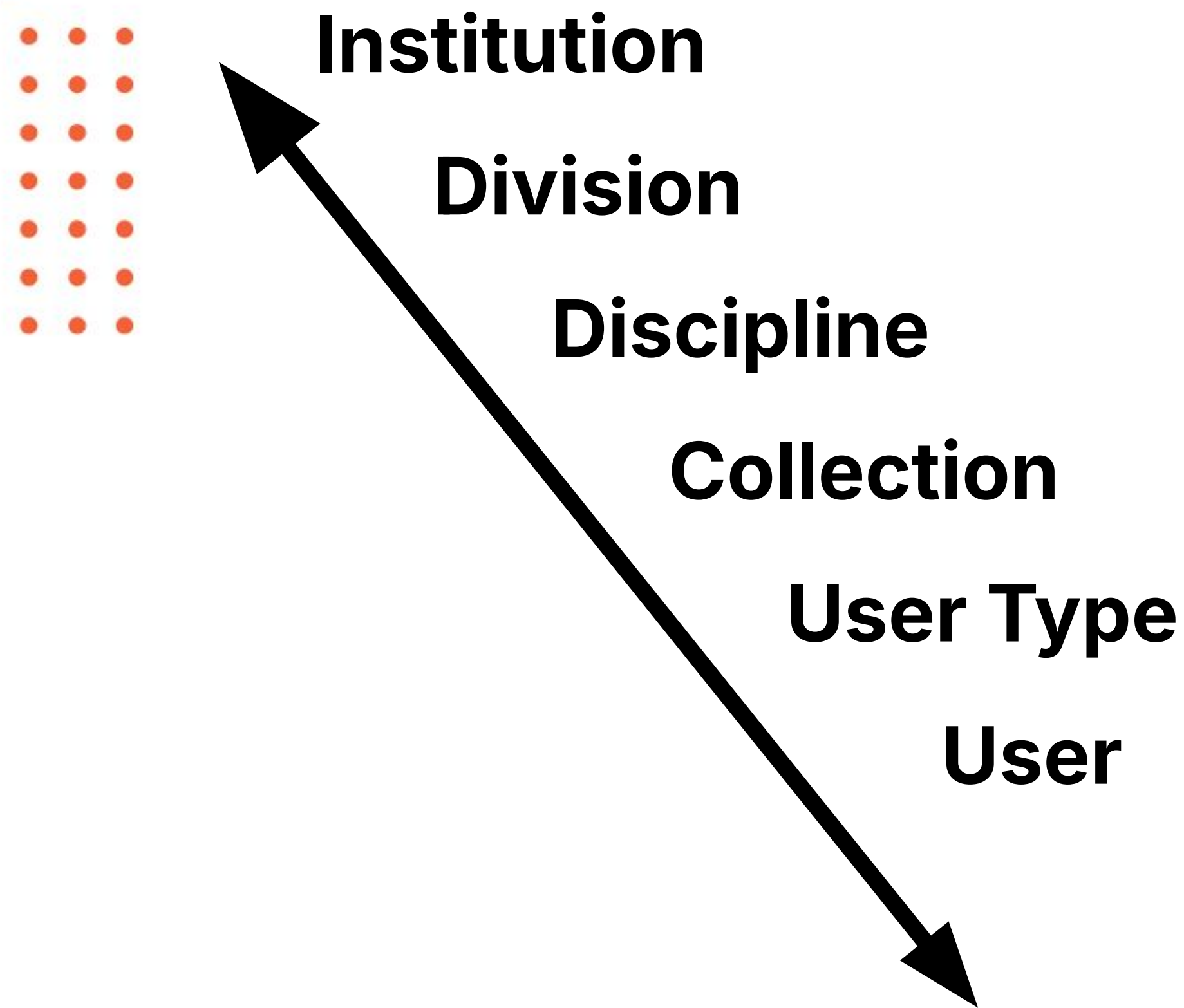
Total Items
Total Current Items
Total Preps
Total Collection Objects

**Deaccession, Disposal,
Exchange Out, Gift**



Total Preps
Total Items

Form Definition Order



- The forms are applied sequentially in ascending order of **hierarchy**: starting from User, User Type, Collection, Discipline, Division, and finally Institution.
- If you have a view definition at the **User** level for a given table, it will take precedence over any conflicting view definitions at a higher level.
- If you have a Collection Object view definition at the **Collection** level while one exists at the **Discipline** level, the **Collection** level view definition will be used instead within that collection.

CO New Collection Object

Cat #	#####	Accession #	
Cataloger	Bentley, Andrew	Cat Date	Full Date

▼ Determinations + -

Taxon			
Preferred Taxon			
Date	Full Date	mm/dd/yyyy	Determiner
Collecting Event			

▼ Preparations (1) +

Object Type	Count	Current Count:	Is On Loan	Preparation Attachments
Object Type				
Prepared By				
Prepared Date				

▼ Col Obj Attribute + -

No Data.

Attachments

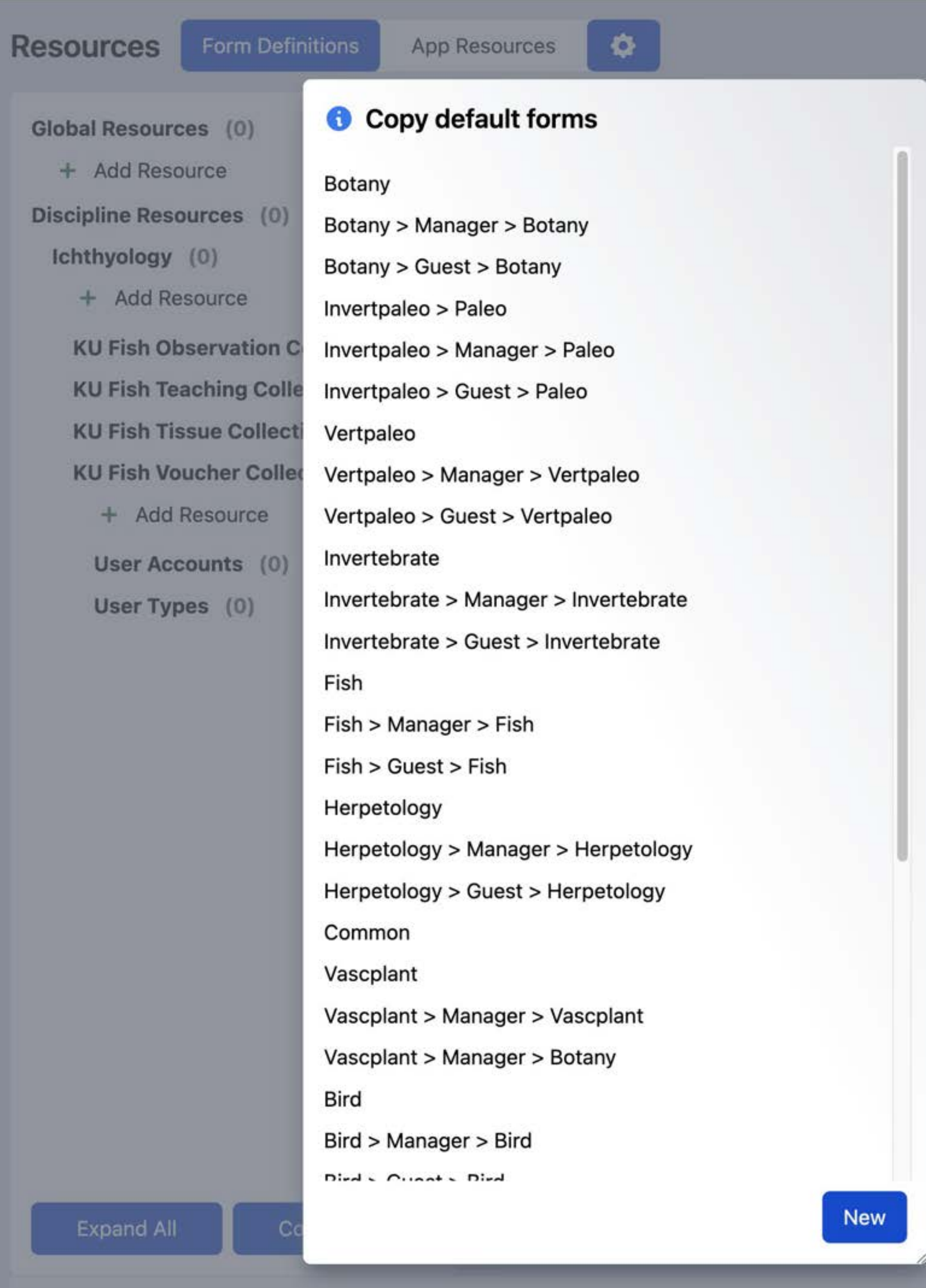
▼ Collection Object Attachments + -

No Data.

Form Defaults

- Specify provides a number of default forms out of the box that are used when custom-defined forms are not available.
- If your collection is in the **Ichthyology** discipline and there are no custom form definitions, it will be using the defaults for fish collections.
 - The same is true with their respective defaults for the other discipline (such as Botany, Entomology, Herpetology, Mammalogy, Paleontology, etc.)
- These defaults can be used as a starting point when customizing your forms!





Form Defaults

- When creating a new “Form Definition” app resource under a level in the institutional hierarchy, you are presented with a list of default forms to choose from.
- If you are creating a new form definition for the discipline or collection, you will most likely want to choose the discipline default that aligns with the one you are currently working in.
- You can also choose to start from scratch by clicking “**New**”.

Resources

Form Definitions

App Resources

Global Resources (0)

+ Add Resource

Discipline Resources (1)

Ichthyology (1)

Fish

+ Add Resource

KU Fish Observation Collection (0)

KU Fish Teaching Collection (0)

KU Fish Tissue Collection (0)

KU Fish Voucher Collection (0)

+ Add Resource

User Accounts (0)

User Types (0)

Fish

Collecting Event (1)

Collecting Event Attribute (1)

Collection Object (3)

Collection Object Attribute (1)

Determination (2)

Locality (1)

Preparation (1)

Show All Tables

Editing Form Definitions

- Once a new form definition is created, you will either see a list of tables or a blank screen.
- This list represents the tables that have view definitions present in this form definition.
- To create a new view definition under a table not already visible, you need to select "Show All Tables".

Table Name

CO Collection Object (3)

Number of view definitions

Editing Form Definitions

- After selecting “Show All Tables”, you can choose any table from the list to create a new view definition for.
- Once you select a table, you can see all view definitions for that table in a list. You can either select one of the existing view definitions to edit or you can click “**Create**” to make a new one!

Locality

← Tables

Locality

Create

Collection Object

← Tables

AccessionItems

CollectionObject

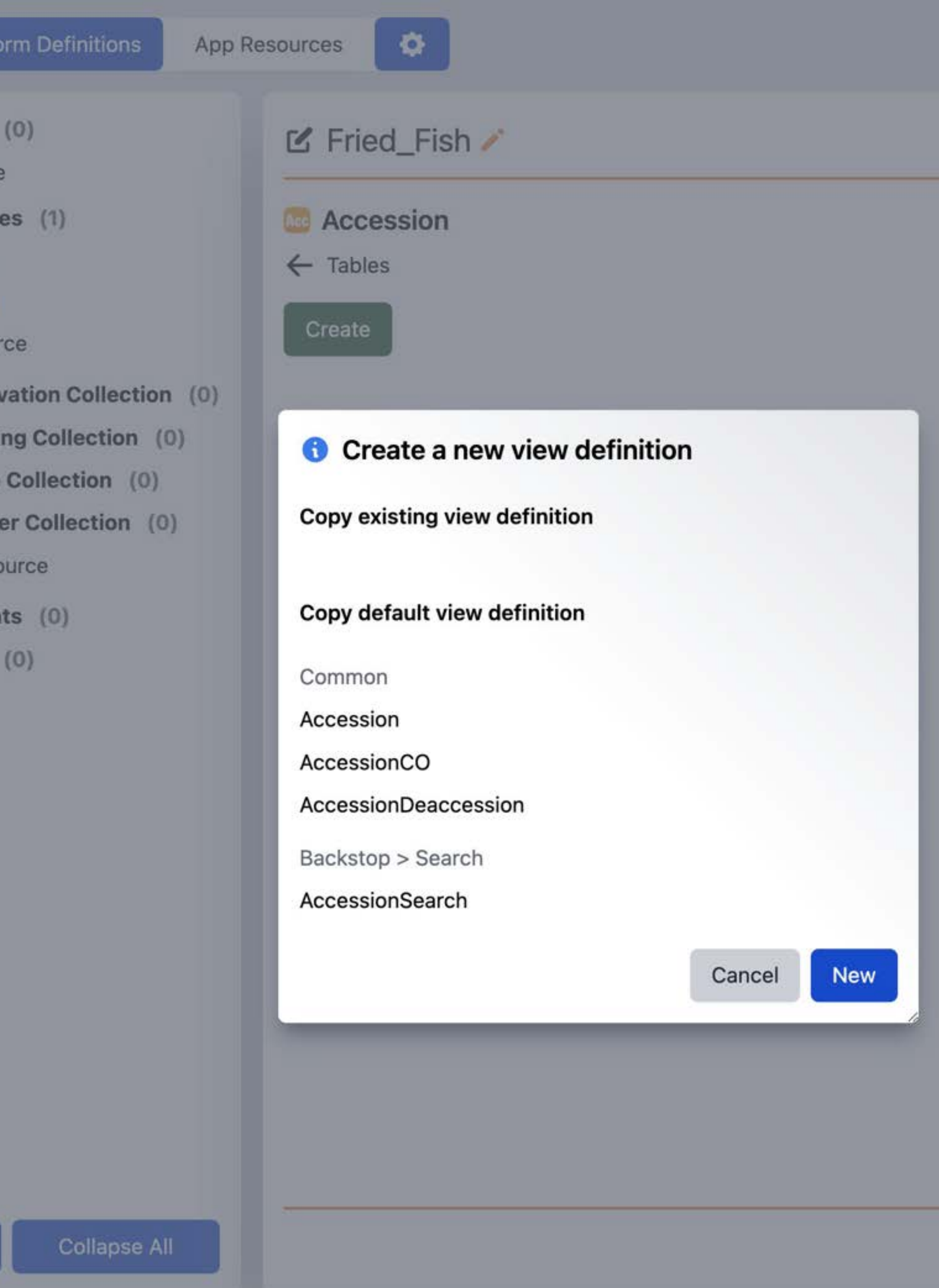
CollectionObjectSub

Create

Address

← Tables

Create



Creating a View Definition

- If you go to create a new view definition, you will be presented two lists of options:
 - **Copy existing view definition** will allow you to copy a view definition from an existing form definition in your database.
 - **Copy default view definition** will allow you to copy a view definition from one of the default forms for the current table.
 - If you copy, you will see a preview of the form and then be asked to give your copy a name.
- Alternatively, you can click **New** to create one from scratch.

```

1 <viewdef>
2   <desc>The Accession form.</desc>
3   <enableRules/>
4   <columnDef>p,0px,190px,5px,130px,2px,141px,5px,110px,2px,140px,0px,15px,p:g</columnDef>
5   <columnDef os="lnx">135px,2px,200px,5px,135px,2px,153px,5px,125px,2px,153px,0px,15px,p:g</columnDef>
6   <columnDef os="mac">130px,2px,220px,5px,153px,2px,189px,5px,133px,2px,189px,0px,15px,p:g</columnDef>
7   <columnDef os="exp">p,2px,p:g,5px:g,p,2px,p:g(2),5px:g,p,2px,p:g(2),0px,p,p:g</columnDef>
8   <rowDef auto="true" cell="p" sep="1px"/>
9   <rows>
10    <row>
11      <cell type="label" labelfor="1"/>
12      <cell type="field" id="1" name="accessionNumber" uitype="formattedtext"/>
13      <cell type="label" labelfor="3"/>
14      <cell type="field" id="3" name="type" uitype="combobox"/>
15      <cell type="label" labelfor="2"/>
16      <cell type="field" id="2" name="status" uitype="combobox"/>
17    </row>
18    <row>
19      <cell type="label" id="divLabel" label=" " initialize="align=right"/>
20      <cell type="field" id="4" name="divisionCBX" uitype="combobox" ignore="true"/>

```

Accession Number		Type		Status	
Division		Date Accessed		Date Received	
Total Items:		Total Current Items:			
Total Coll Objs:		Total Preps:			
Remarks					

Editing a View Definition

- After creating a view definition, you will see the visual editor for that definition.
- The editor is split in two sections:
 - **XML Editor** on the top
 - **Live Preview** on the bottom

```

<viewdef name="Accession" class="edu.ku.brc.specify.datamodel.Accession" type="form"
gettable="edu.ku.brc.af.ui.forms.DataGetterForObj" settable="edu.ku.brc.af.ui.forms.DataSetterForObj">
  <desc>The Accession form.</desc>
  <enableRules/>
  <columnDef>p,0px,190px,5px,130px,2px,141px,5px,110px,2px,140px,0px,15px,p:g</columnDef>
  <columnDef os="lnx">135px,2px,200px,5px,135px,2px,153px,5px,125px,2px,153px,0px,15px,p:g</columnDef>
  <columnDef os="mac">130px,2px,220px,5px,153px,2px,189px,5px,133px,2px,189px,0px,15px,p:g</columnDef>
  <columnDef os="exp">p,2px,p:g,5px:g,p,2px,p:g(2),5px:g,p,2px,p:g(2),0px,p,p:g</columnDef>
  <rowDef auto="true" cell="p" sep="1px"/>
  <rows>
    <row>
      <cell type="label" labelfor="1"/>
      <cell type="field" id="1" name="accessionNumber" uitype="formattedtext"/>
      <cell type="label" labelfor="3"/>
      <cell type="field" id="3" name="type" uitype="combobox"/>
      <cell type="label" labelfor="2"/>
      <cell type="field" id="2" name="status" uitype="combobox"/>
    </row>
    <row>
      <cell type="label" id="divLabel" label=" " initialize="align=right"/>
      <cell type="field" id="4" name="divisionCBX" uitype="combobox" ignore="true"/>
      <cell type="label" labelfor="5"/>
      <cell type="field" id="5" name="dateAccessioned" uitype="formattedtext" uifieldformatter="Date" default="today"/>
      <cell type="label" labelfor="6"/>
      <cell type="field" id="6" name="dateReceived" uitype="formattedtext" uifieldformatter="Date" default="today"/>
    </row>
    <row>
      <cell type="label" label="Total Items:" initialize="align=right"/>
      <cell type="field" id="tca" name="totalCountAmt" uitype="text" readonly="true"/>
      <cell type="label" label="Total Current Items:" initialize="align=right"/>
      <cell type="field" id="atca" name="actualTotalCountAmt" uitype="text" readonly="true"/>
    </row>
  </rows>
</viewdef>

```

Accession Number		Type	v	Status	v
Division	Division	Date Accessioned	05/03/2024	Date Received	05/03/2024
Total Items:		Total Current Items:			
Total Coll Objs:		Total Preps:			
Remarks					

View Definition Structure

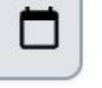
- To make changes to the live preview, you must edit the **XML** for the view definition.
- At its core, the Specify form system is a set of rows and columns.
- There are **columns** that elements in each **row** can occupy.
- There must be enough columns for elements you wish to add to each row.

```

<viewdef>
  <desc>The Accession form.</desc>
  <enableRules/>
  <columnDef>p,0px,190px,5px,130px,2px,141px,5px,110px,2px,140px,0px,15px,p:g</columnDef>
  <columnDef os="lnx">135px,2px,200px,5px,135px,2px,153px,5px,125px,2px,153px,0px,15px,p:g</columnDef>
  <columnDef os="mac">130px,2px,220px,5px,153px,2px,189px,5px,133px,2px,189px,0px,15px,p:g</columnDef>
  <columnDef os="exp">p,2px,p:g,5px:g,p,2px,p:g(2),5px:g,p,2px,p:g(2),0px,p,p:g</columnDef>
  <rowDef auto="true" cell="p" sep="1px"/>

```

Accession Number		Type	v	Status	v
Division	Division 	Date Accessioned	05/03/2024 	Date Received	05/03/2024 
Total Items:		Total Current Items:			
Total Coll Objs:		Total Preps:			
Remarks					

Accession Number		Type	v	Status	v
Division	Division 	Date Accessioned	05/03/2024 	Date Received	05/03/2024 
Total Items:		Total Current Items:			
Total Coll Objs:		Total Preps:			
Remarks					

Column Definitions

- At the beginning of each view definition, there is a set of **<columnDef>** elements.
 - Specify 7 uses the **<columnDef os="lnx">** line while 6 uses the **<columnDef>** line with no os specified.
 - Column widths are defined in pixel (px) units, though these are converted to fractions based on the user's screen width.
- **<rowDef>** can safely be ignored

Column Definitions

```
<viewdef>
  <desc>The Accession form.</desc>
  <enableRules/>
  <columnDef>p,0px,190px,5px,130px,2px,141px,5px,110px,2px,140px,0px,15px,p:g</columnDef>
  <columnDef os="lnx">135px,2px,200px,5px,135px,2px,153px,5px,125px,2px,153px,0px,15px,p:g</columnDef>
  <columnDef os="mac">130px,2px,220px,5px,153px,2px,189px,5px,133px,2px,189px,0px,15px,p:g</columnDef>
  <columnDef os="exp">p,2px,p:g,5px:g,p,2px,p:g(2),5px:g,p,2px,p:g(2),0px,p,p:g</columnDef>
  <rowDef auto="true" cell="p" sep="1px"/>
</viewdef>
```

Every other column
is skipped as a
"space"

135px	200px	135px	153px	125px	153px	15px
Accession Number		Type	v	Status	v	
Division	Division  	Date Accessioned	05/03/2024 	Date Received	05/03/2024 	
Total Items:		Total Current Items:				
Total Coll Objs:		Total Preps:				
Remarks						

Column Definitions

Spaces are counted as columns for the purpose of form editing

13 columns total

1 2 3 4 5 6 7 8 9 10 1 1 1
135px, 2px, 200px, 5px, 135px, 2px, 153px, 5px, 125px, 2px, 153px, 0px, 15px, p:g

135px

200px

135px

153px

125px

153px

15px

Accession Number		Type		Status	
Division	Division	Date Accessioned	05/03/2024	Date Received	05/03/2024
Total Items:		Total Current Items:			
Total Coll Objs:		Total Preps:			
Remarks					

Row Structure

```
<rows>
  <row>
    <cell type="label" labelfor="1"/>
    <cell type="field" id="1" name="accessionNumber" uitype="formattedtext"/>
    <cell type="label" labelfor="3"/>
    <cell type="field" id="3" name="type" uitype="combobox"/>
    <cell type="label" labelfor="2"/>
    <cell type="field" id="2" name="status" uitype="combobox"/>
  </row>
  <row>
    <cell type="label" id="divLabel" label=" " initialize="align=right"/>
    <cell type="field" id="4" name="divisionCBX" uitype="combobox" ignore="true"/>
    <cell type="label" labelfor="5"/>
    <cell type="field" id="5" name="dateAccessioned" uitype="formattedtext" uifieldformatter="Date" />
    <cell type="label" labelfor="6"/>
    <cell type="field" id="6" name="dateReceived" uitype="formattedtext" uifieldformatter="Date" default="" />
  </row>
  <row>
    <cell type="label" label="Total Items:" initialize="align=right"/>
    <cell type="field" id="tca" name="totalCountAmt" uitype="text" readonly="true"/>
    <cell type="label" label="Total Current Items:" initialize="align=right"/>
    <cell type="field" id="atca" name="actualTotalCountAmt" uitype="text" readonly="true"/>
  </row>
</rows>
```

Accession Number		Type		Status	
Division		Date Accessioned		Date Received	
Total Items:		Total Current Items:			
Total Coll Objs:		Total Preps:			
Remarks					

```
<rows>
  <row>
    <cell type="label" labelfor="1"/>
    <cell type="field" id="1" name="accessionNumber" uitype="formattedtext"/>
    <cell type="label" labelfor="2"/>
    <cell type="field" id="2" name="status" uitype="combobox" colspan="3"/>
  </row>
  <row>
    <cell type="label" labelfor="3"/>
    <cell type="field" id="3" name="type" uitype="combobox"/>
  </row>
  <row>
    <cell type="label" id="divLabel" label=" " initialize="align=right"/>
    <cell type="field" id="4" name="divisionCBX" uitype="combobox" ignore="true"/>
    <cell type="label" labelfor="5"/>
    <cell type="field" id="5" name="dateAccessioned" uitype="formattedtext" uifieldformatter="Date" />
    <cell type="label" labelfor="6"/>
    <cell type="field" id="6" name="dateReceived" uitype="formattedtext" uifieldformatter="Date" default="" />
  </row>
</rows>
```

Accession Number		Status	
Type			
Division		Date Accessioned	
Total Items:		Total Current Items:	
Total C			

Inside of the `<rows>` element, there are individual `<row>` elements containing all of the fields, labels, and subviews (defined as `<cell>` elements) visible on the form.

Row Structure

```
<rows>
  <row>
    <cell type="label" labelfor="1"/>
    <cell type="field" id="1" name="accessionNumber" uitype="formattedtext"/>
    <cell type="label" labelfor="3"/>
    <cell type="field" id="3" name="type" uitype="combobox"/>
    <cell type="label" labelfor="2"/>
    <cell type="field" id="2" name="status" uitype="combobox"/>
  </row>
  <row>
    <cell type="label" id="divLabel" label=" " initialize="align=right"/>
    <cell type="field" id="4" name="divisionCBX" uitype="combobox" ignore="true"/>
    <cell type="label" labelfor="5"/>
    <cell type="field" id="5" name="dateAccessioned" uitype="formattedtext" uifieldformatter="Date" />
    <cell type="label" labelfor="6"/>
    <cell type="field" id="6" name="dateReceived" uitype="formattedtext" uifieldformatter="Date" default="" />
  </row>
</rows>
```

Accession Number		Type		Status	
Division		Date Accessioned		Date Received	
Total Items:		Total Current Items:			
Total Coll Objs:		Total Preps:			
Remarks					

Row Structure

```
<rows>
<row>
  <cell type="label" labelfor="1"/>
  <cell type="field" id="1" name="accessionNumber" uitype="formattedtext"/>
  <cell type="label" labelfor="2"/>
  <cell type="field" id="2" name="status" uitype="combobox" colspan="3"/>
</row>
<row>
  <cell type="label" labelfor="3"/>
  <cell type="field" id="3" name="type" uitype="combobox"/>
</row>
<row>
  <cell type="label" id="divLabel" label=" " initialize="align=right"/>
  <cell type="field" id="4" name="divisionCBX" uitype="combobox" ignore="true"/>
  <cell type="label" labelfor="5"/>
  <cell type="field" id="5" name="dateAccessioned" uitype="formattedtext" uifieldformatter="Date"/>
  <cell type="label" labelfor="6"/>
</row>
```

The colspan=" " attribute allows a single cell to span multiple columns

Accession Number		Status	
Type			
Division	Paleo	Date Accessioned	05/05/2024
		Date Received	05/05/2024
Total Items:		Total Current Items:	
Total Coll Objs:		Total Preps:	

Cell Structure

```
<rows>
  <row>
    <cell type="label" labelfor="1"/>
    <cell type="field" id="1" name="accessionNumber" uitype="formattedtext"/>
    <cell type="label" labelfor="2"/>
    <cell type="field" id="2" name="status" uitype="combobox" colspan="3"/>
  </row>
  <row>
    <cell type="label" labelfor="3"/>
    <cell type="field" id="3" name="type" uitype="combobox"/>
  </row>
  <row>
    <cell type="label" id="divLabel" label=" " initialize="align=right"/>
    <cell type="field" id="4" name="divisionCBX" uitype="combobox" ignore="true"/>
    <cell type="label" labelfor="5"/>
    <cell type="field" id="5" name="dateAccessioned" uitype="formattedtext" uifieldfor="5"/>
    <cell type="label" labelfor="6"/>
  </row>
</rows>
```

Accession Number		Status	
Type			
Division	Paleo 	Date Accessioned	05/05/2024 
		Date Received	05/05/2024
Total Items:		Total Current Items:	
Total Coll Objs:		Total Preps:	

- Each **<cell>** has several attributes, but the essential ones are as follows:
 - **Type** (e.g. label, field, blank, command)
 - **LabelFor** (*for labels*, contains the ID of the field it is a label for)
 - **ID** (must be unique within the view definition)
 - **Name** (*for fields*, should match a Specify data model field name)
 - **Uitype** (e.g. text, combobox, subview)
 - **Default** (sets a default value for the field)
 - **Initialize** (enable specific behaviors for the given field)



```
<viewdef name="Collection Object" class="edu.ku.brc.specify.datamodel.CollectionObject" type="form"  
gettable="edu.ku.brc.af.ui.forms.DataGetterForObj" settable="edu.ku.brc.af.ui.forms.DataSetterForObj">  
  <desc>The Collection Object form..</desc>  
  <enableRules/>  
  <columnDef>100px,2px,195px,5px,96px,2px,50px</columnDef>  
  <columnDef os="lnx">115px,2px,195px,5px,125px,2px,50px</columnDef>  
  <columnDef os="mac">130px,2px,215px,5px,128px,2px,50px</columnDef>  
  <columnDef os="exp">p,2px,min(p;250px),5px,125px,2px,50px</columnDef>  
  <rowDef auto="true" cell="p" sep="2px"/>  
  <rows>  
    <row>  
      <cell type="label" labelfor="1"/>  
      <cell type="field" id="1" name="catalogNumber" uitype="text"/>  
      <cell type="label" labelfor="3"/>  
      <cell type="field" id="3" name="accession" uitype="querycbx" isrequired="false" colspan="3"/>  
      <cell type="label" labelfor="14"/>  
      <cell type="field" id="14" name="altCatalogNumber" uitype="text"/>  
    </row>  
    <row>  
      <cell type="label" labelfor="4"/>  
      <cell type="field" id="4" name="cataloger" uitype="querycbx" initialize="name=Agent;title=Catalog Agent"  
isrequired="true"/>  
      <cell type="label" labelfor="5"/>  
      <cell type="field" id="5" uitype="plugin" name="this"  
initialize="name=PartialDateUI;df=catalogedDate;tp=catalogedDatePrecision" uifieldformatter="Date" colspan="3"/>  
      <cell type="label" labelfor="2"/>  
      <cell type="field" id="2" name="projectNumber" uitype="text"/>  
    </row>  
    <row>  
      <cell type="subview" viewname="Determination" id="6" name="determinations" colspan="14" rows="5"/>
```

```
<cell type="label" labelfor="1"/>
```

```
<cell type="field" id="1" name="catalogNumber" ui type="text"/>
```

Cat #		Accession #		  	Prev/Exch #		
Cataloger	Bentley, Andre   	Cat Date	Full Date mm/dd/yyyy 	Project Number			

Determinations  

Data.

Field No:		  
Locality		

Preparations (0) 

Data.

Col Obj Attribute  

Data.

Attachments  

Cell Structure

- The field name (e.g. "**catalogNumber**", "**collectingEvent**", "**altCatalogNumber**") is **camel case**, meaning that it starts with a lowercase letter and each *subsequent* word starts with a capital letter, without spaces between words
- The **labelfor** and **id** values *must* be identical to resolve the correct label based on the field's name in the schema.
 - In this case, the label and field are linked using the **ID** of **1**.

Table: collectionobject

CaptionCollection Object

DescriptionA general term for anything that can be a part of your collection: a specimen, a specimen lot, a sound recording, a slide, a tissue, an extract, or a spectrogram. test

Table FormatCollectionObject

Table AggregationCollectionObject

Uniqueness Rules

☐ Hide Table

Fields

altCatalogNumber
catalogedDate
catalogNumber
fieldNumber
guid
projectNumber
remarks
reservedText
reservedText2
text1
text2
timestampModified
availability (hidden)
catalogedDatePrecision (hidden)
catalogedDateVerbatim (hidden)
collectionMemberId (hidden)
countAmt (hidden)
date1 (hidden)
date1Precision (hidden)
deaccessioned (hidden)
description (hidden)
embargoReason (hidden)
embargoReleaseDate (hidden)
embargoReleaseDatePrecision (hidden)
embargoStartDate (hidden)
embargoStartDatePrecision (hidden)
integer1 (hidden)
integer2 (hidden)
inventoryDate (hidden)

Field: catalogNumber

CaptionCat #

DescriptionCatalog Number

Length32

TypeString

☐ Hide Field

☐ Is Required

Field Format

☒ None

☒ FormattedCatalogNumberNum

☐ Web LinkNone

☐ Pick ListNone

```
<cell type="label" labelfor="1"/>
<cell type="field" id="1" name="catalogNumber" uitype="text"/>
```

Cell Structure

- In the Schema Config, you can view all the available fields for the table you are editing the form of.
- This includes information about the field length, type, and other metadata.
- The `uitype=""` for a field is influenced by the field format.



Panel

- **Panels** are a special type of cell that has its own column definition for a series of rows that exist within it.
- Panels enable users to create conditional forms which show a certain set of rows based on the value of a field in the view definition's table.

```
<cell type="panel" id="116" name="outerPanel" coldef="p,2px,p:g,5px,p:g" colspan="5">
  <rows>
    <row>
      <cell type="label" labelfor="11"/>
      <cell type="field" id="11" name="timestampModified" uitype="label"
readonly="true"/>
    </row>
    <row>
      <cell type="label" labelfor="10"/>
      <cell type="field" id="10" name="modifiedByAgent" uitype="label"
readonly="true" uifieldformatter="Agent"/>
    </row>
  </rows>
</cell>

<row>
  <cell type="panel" coldef="100px,2px,76px" colspan="6">
    <rows>
      <!-- This view definition will be displayed in Specify 6, or if all other
conditions don't match -->
      <row>
        <cell type="label" labelfor="fieldNumber"/>
        <cell type="field" id="fieldNumber" name="fieldNumber" uitype="text"
readonly="true"/>
      </row>
    </rows>
    <!-- This definition will only be displayed if fieldNumber is 2 -->
    <rows condition="fieldNumber=2">
      <row>
        <cell type="label" label="Field Number is 2!" />
      </row>
    </rows>
    <!-- Condition can be in a related table. Aggregator and formatter are called
automatically when necessary -->
    <!-- Can also override the column definition using the coldef attribute -->
    <rows condition="accession.accessionNumber=1111-11-11" coldef="13px,14px,15px">
      <row>
        <cell type="label" label="Accession Number is 1111-11-11!" />
      </row>
    </rows>
  </cell>
</row>d
```

Literal Fields

- Fields that are captured in the base table itself are **literal fields**.
 - This includes fields like **catalogNumber**, **catalogedDate**, **guid**, **remarks**, **text1**, **integer1**, and so on.
- The `uitype=""` for a field is influenced by the field format.
 - Fields assigned the "Pick List" format must have a **`uitype="combobox"`** to display as a dropdown.
 - Fields assigned the "Web Link" format must have a **`uitype="combobox"`** to display as a dropdown.

Fields
altCatalogNumber
catalogedDate
catalogNumber
fieldNumber
guid
projectNumber
remarks
reservedText
reservedText2
text1
text2
timestampModified
availability (hidden)
catalogedDatePrecision (hidden)
catalogedDateVerbatim (hidden)
collectionMemberId (hidden)
countAmt (hidden)
date1 (hidden)
date1Precision (hidden)
deaccessioned (hidden)
description (hidden)
embargoReason (hidden)
embargoReleaseDate (hidden)
embargoReleaseDatePrecision (hidden)
embargoStartDate (hidden)
embargoStartDatePrecision (hidden)
integer1 (hidden)
integer2 (hidden)

Field: email

Caption

Email

Description

Email address for agent.

Length

50

Type

String

☐ Hide Field

☐ Is Required

Field Format

☐ None

☐ Formatted None

☒ Web Link Email

☐ Pick List None

Literal Fields - UI Type

- The **uitype=""** for a field is influenced by the field format.
 - Fields assigned the “Web Link” format must have both **uitype="plugin"** and **initialize="name=WebLinkButton;weblink={Name}"** to display as a dropdown (replace {Name} with the name of the web link assigned in the schema).
 - Fields assigned the “Pick List” format must have a **uitype="combobox"** to display as a dropdown.

Agent Type: Person (dropdown)
Title: (dropdown)
Last Name: Fitzsimmons
First Name: Grant
Email: (text input with link icon)

```
<cell type="label" labelfor="99"/>  
<cell type="field" id="99" name="email" uitype="plugin"  
initialize="name=WebLinkButton;weblink=Email"/>
```

Field: email

Caption: Email

Description: Email address for agent.

Length: 50

Type: String

☐ Hide Field

☐ Is Required

Field Format

- ☐ None
- ☐ Formatted: None (dropdown)
- ☒ Web Link: Email (dropdown) [edit icon] [plus icon]
- ☐ Pick List: None (dropdown) [plus icon]

Literal Fields - UI Type

- Fields assigned the "Pick List" format must have a **uitype="combobox"** to display as a dropdown.

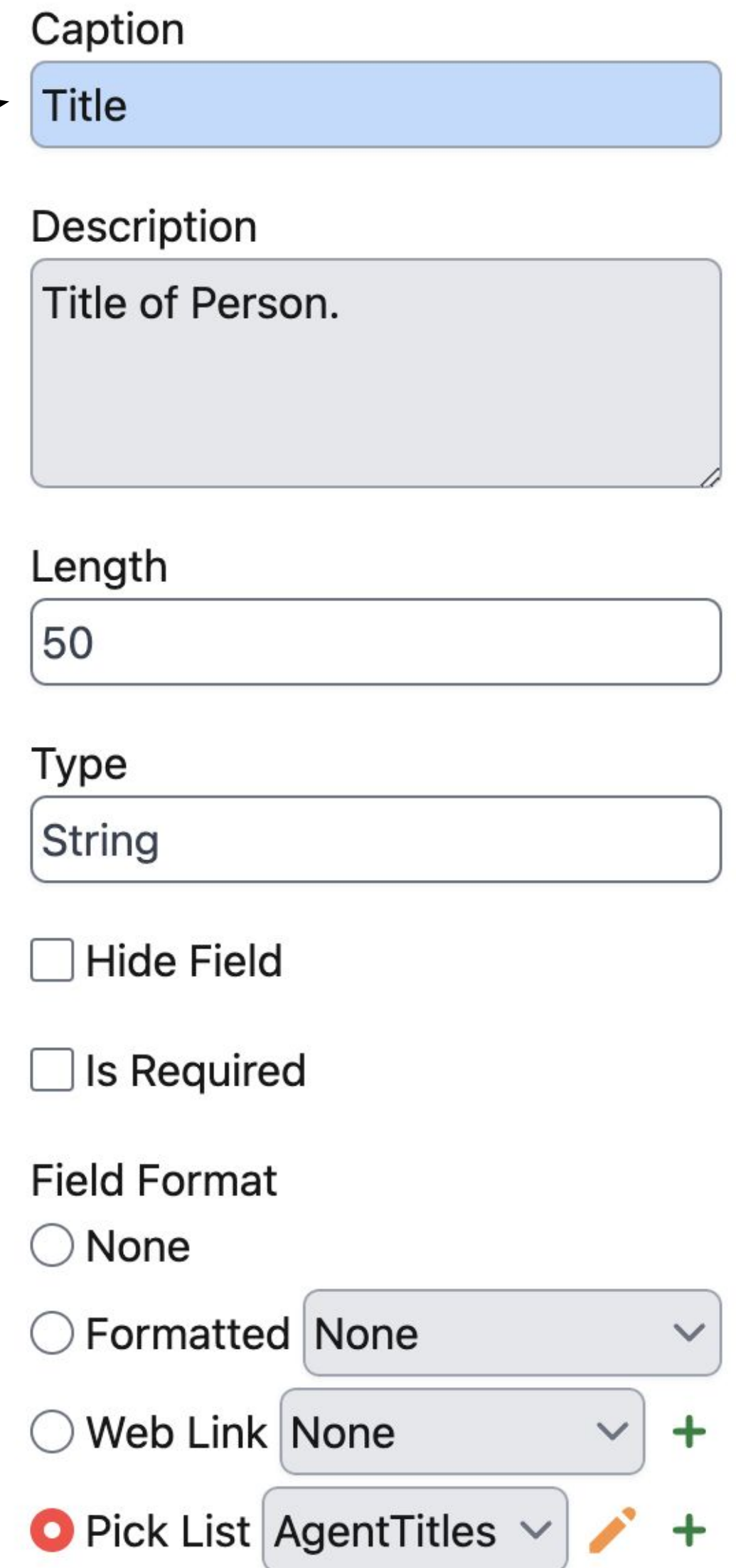


The screenshot shows a form with the following fields:

- Agent Type: Person (dropdown)
- Title: (dropdown menu, highlighted with a blue border and an arrow pointing to the configuration panel on the right)
- Last Name: Fitzsimmons (text input)
- First Name: Grant (text input)
- Email: (text input)

```
<cell type="label" labelfor="1"/>
<cell type="field" id="1" name="title" uitype="combobox"/>
```

- Fields without an assigned field format or with the "Formatted" field format can simply set **uitype="text"** as this is handled automatically.
- Integer, decimal, and number fields also use the **uitype="text"**.



The configuration panel for the Title field includes the following settings:

- Caption: Title
- Description: Title of Person.
- Length: 50
- Type: String
- ☐ Hide Field
- ☐ Is Required
- Field Format:
 - ☐ None
 - ☐ Formatted: None (dropdown)
 - ☐ Web Link: None (dropdown) +
 - ☒ Pick List: AgentTitles (dropdown) +

Literal Fields - Default Values

- **Default Values:** Most Specify literal fields can be given a default values by a **default=""** attribute.
 - **Text:** Text and number fields (including fields with the "Pick list" field format) can be anything.
 - **Dates:** Date fields can be set to the current day by using the **default="today"** attribute.
 - The precision for supported date fields can also be set with
defaultPrecision="{precision}"
 - **defaultPrecision="full"** (full, month-year, year)
 - **Checkbox:** Checkbox (also known as boolean) fields can be set to be TRUE or FALSE
 - **default="true"** (true, false)

```
<cell type="field" id="12" name="dateAccessioned" uitype="text" uifieldformatter="Date" default="today"/>
```

```
<cell type="field" id="yn1" name="yesNo1" uitype="checkbox" default="true"/>
```

```
<cell type="field" id="7" name="prepType" uitype="combobox" default="Sheet"/>
```

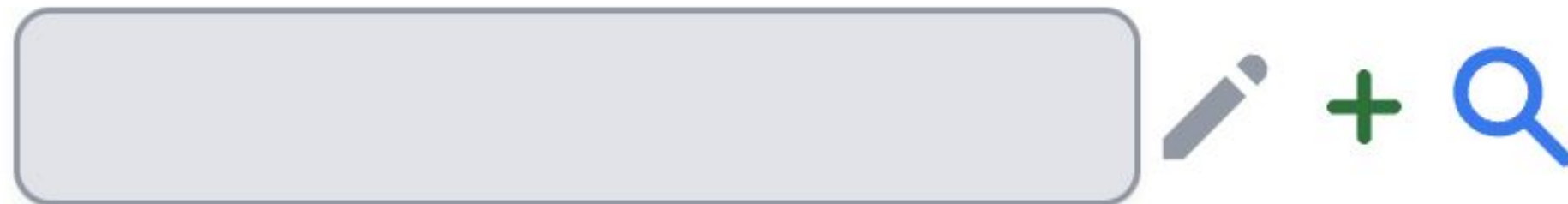
Relationship Fields - Query Combo Box

When adding *most* relationship fields with a “many-to-one” field type, it must be configured as a “**query combo box**”

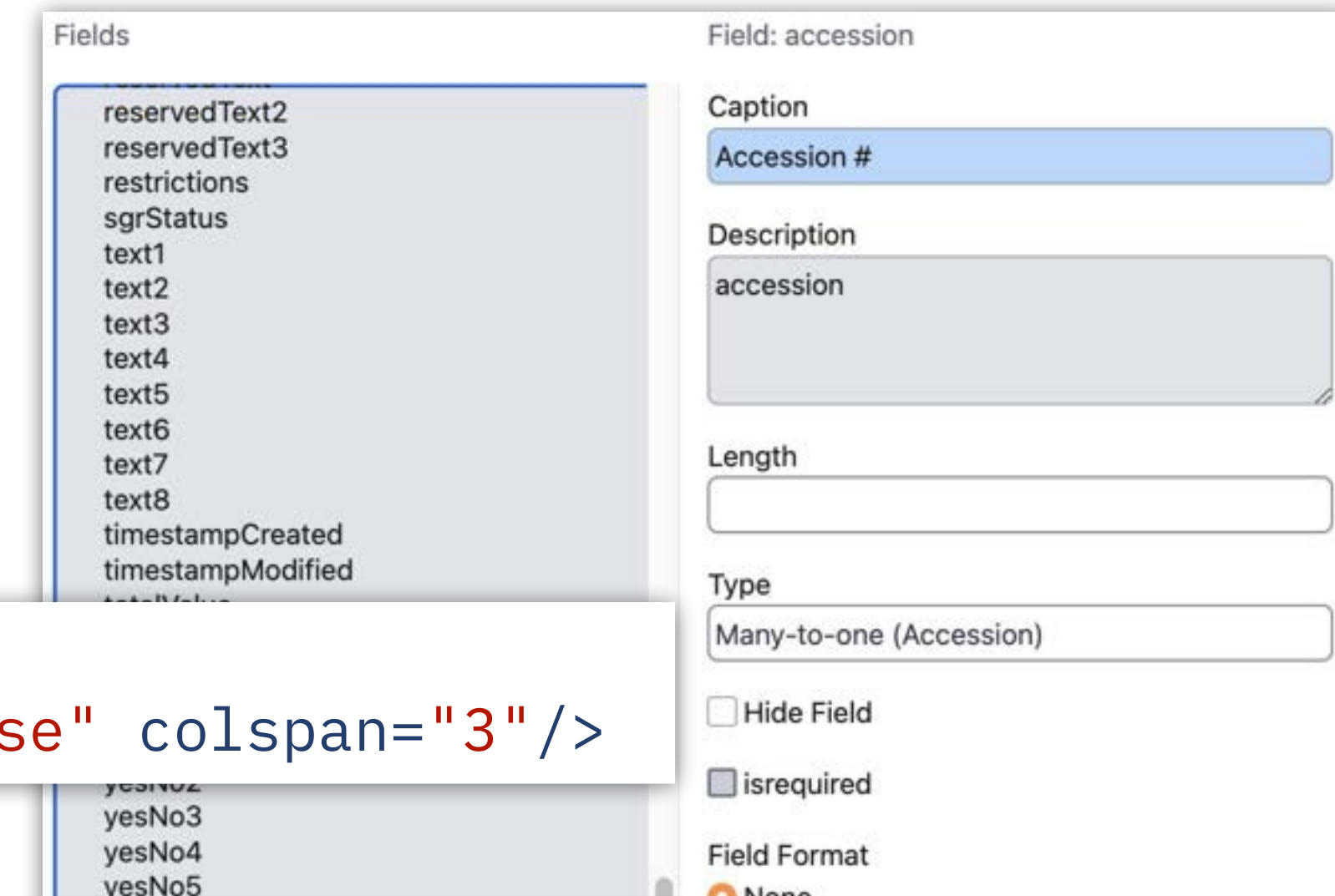
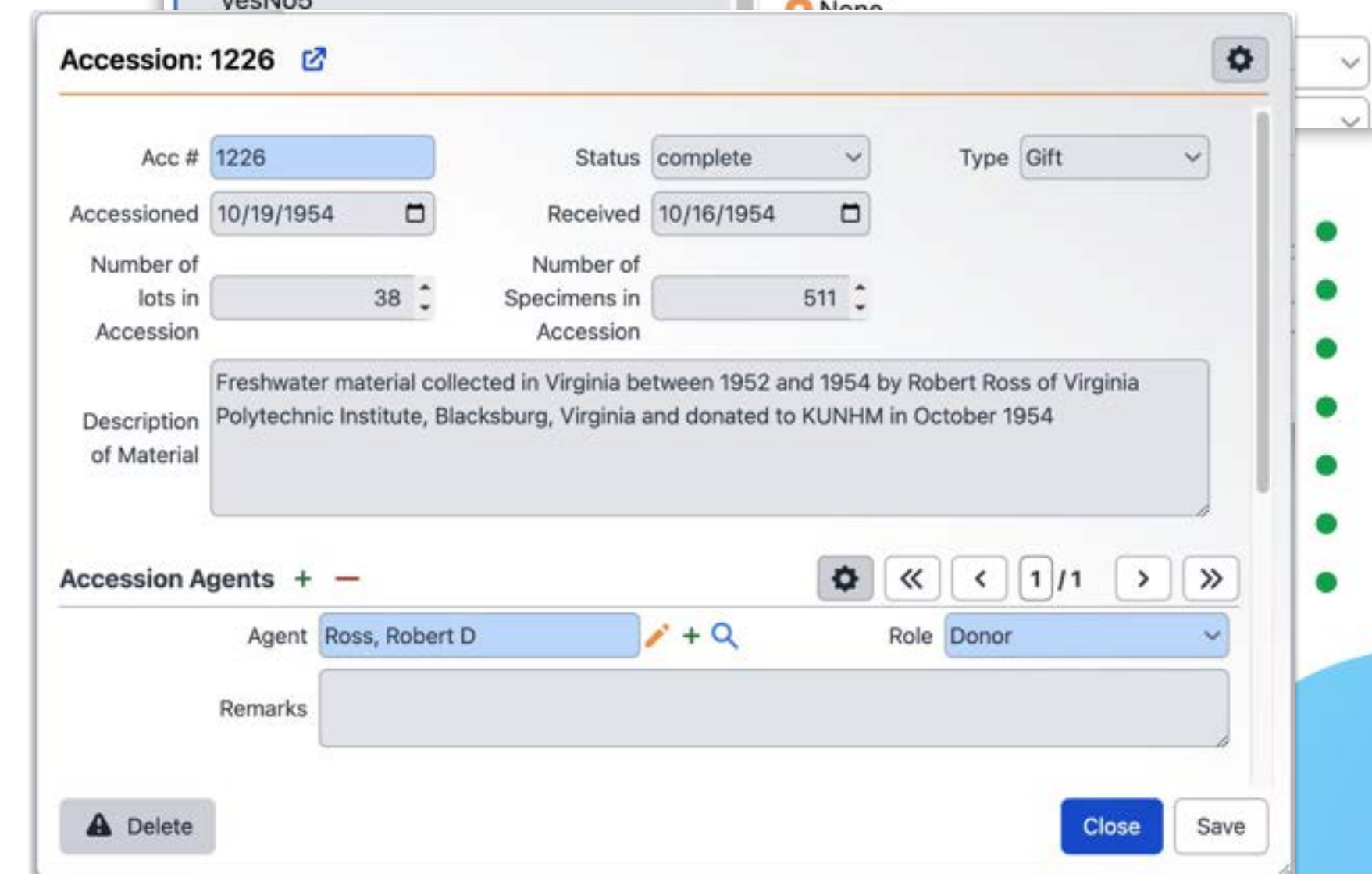
(`type="field"` and `uitype="querycbx"`) in the cell definition.

```
<cell type="label" labelfor="3"/>
<cell type="field" id="3" name="accession" uitype="querycbx" isrequired="false" colspan="3"/>
```

Accession #

A light gray rounded rectangular input field for 'Accession #'. To its right are three icons: a pencil (edit), a green plus sign (add), and a magnifying glass (search).

A **query combo box** allows the user to look up (🔍) or create (+) a record in the related table (in this case, Accession) and link it to the main record being cataloged. They can edit the record selected as well using the 🖋 (Edit) button.

A screenshot of a field configuration window. On the left, a list of fields includes 'reservedText2', 'reservedText3', 'restrictions', 'sgrStatus', 'text1' through 'text8', 'timestampCreated', and 'timestampModified'. On the right, the configuration for 'Field: accession' is shown, including a 'Caption' of 'Accession #', a 'Description' of 'accession', a 'Length' input, a 'Type' of 'Many-to-one (Accession)', and checkboxes for 'Hide Field' and 'isrequired'.A screenshot of a record detail view for 'Accession: 1226'. It shows a form with fields for 'Acc #', 'Status' (complete), 'Type' (Gift), 'Accessioned' (10/19/1954), 'Received' (10/16/1954), 'Number of lots in Accession' (38), and 'Number of Specimens in Accession' (511). A 'Description of Material' text area contains details about freshwater material collected in Virginia. Below this is a section for 'Accession Agents' showing 'Agent: Ross, Robert D' and 'Role: Donor'. At the bottom are 'Delete', 'Close', and 'Save' buttons.

Relationship Fields - Subview

agent1
appraisal
cataloger
collectingEvent
collection
collectionObjectAttachments
collectionObjectAttribute
collectionObjectAttrs
collectionObjectCitations
collectionObjectProperties
conservDescriptions
container
containerOwner
createdByAgent
determinations
dnaSequences
embargoAuthority
exsiccatItems
fieldNotebookPage
inventorizedBy
leftSideRels
modifiedByAgent
otherIdentifiers
paleoContext

Caption
Determinations

Description
determinations

Length

Type
One-to-many (Determination)

☐ Hide Field
☐ isrequired

Field Format
☒ None

When adding a relationship field with a “one-to-many” or “one-to-one” field type, it should be shown as a “**subview**” (**type=“subview”**) in the cell definition.

```
<cell type="label" labelfor="6"/>  
<cell type="subview" viewname="Determination" id="6"  
name="determinations" colspan="12" rows="5"/>
```

CO New Collection Object: #####

Cat # ##### Accession # 1226 Prev/Exch #

Cataloger User, Test C Cat Date Full Date 05/10/2024

Determinations + -

Taxon Preferred Taxon Determiner Date Full Date mm/dd/yyyy Type Status

Remarks

Field No:Locality

☐ In Question ☒ Current

A subview shows the view definition specified in the cell for a related table and links the record to the base object being cataloged (i.e. Collection Object).

Relationship Fields - Subview

```
<cell type="subview" viewname="CustomDetermination" id="6" name="determinations" colspan="14" rows="5"/>
```

```
29 <row>
30   <cell type="subview" viewname="CollectingEventSub" id="21" name="collectingEvent" colspan="14" rows="5"/>
31 </row>
32 <row>
```

Catalog # #####

Accession   

Tissue #

Cataloger spbirdadmin Person   

Cataloged Date Full Date mm/dd/yyyy 

Audio

▼ Determinations + -

 << < 1 / 1 > >>

Hi! I'm on a custom view definition named 'Custom Determination'.

Taxon    ☒ Current

Preferred Taxon

Determined Date Full Date mm/dd/yyyy 

Determiner   

Type Status

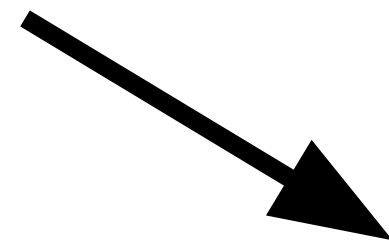
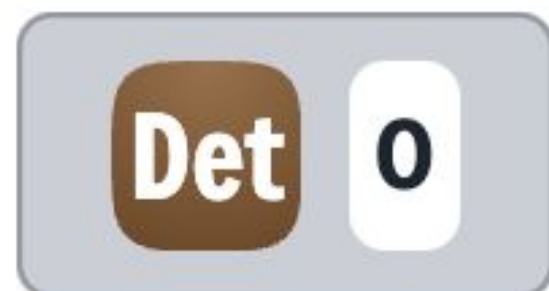
Custom View Definitions: To define a custom view definition for a subview, you need to first create a view definition under the appropriate table. Once completed, the name of the custom view definition goes inside of the **viewname=""** attribute for the subview.

Relationship Fields - Subview

Subviews can be displayed as a button as well (add `initialize="btn=true"`).

When the button is clicked, a dialog will appear using the view definition specified.

```
<cell type="label" labelfor="6"/>  
<cell type="subview" viewname="Determination" id="6" name="determinations" initialize="btn=true" colspan="12" rows="5"/>
```



Determinations + - << < 1 / 1 > >>

Taxon

Preferred Taxon

Determined Date

Full Date ▼ mm/dd/yyyy 📅

Determiner

Type Status

🔍 + 🔍 📌 Current

🔍 + 🔍

Close

Relationship Fields - Subview

Subviews can also be shown as either a table or a form.

```
<cell type="label" labelfor="6"/>
<cell type="subview" viewname="Determination" id="6" name="determinations" defaulttype="table" colspan="12" rows="5"/>
```

Cataloger Cataloged Date Audio

▼ Determinations (1) +

Taxon	Current	Preferred Taxon	Determined Date	Determiner	Type Status
	☒		mm/dd/yyyy		

```
<cell type="label" labelfor="6"/>
<cell type="subview" viewname="Determination" id="6" name="determinations" defaulttype="form" colspan="12" rows="5"/>
```

Cataloger Cataloged Date Audio

▼ Determinations + -

1 / 1

Taxon	+ ☒ Current				
Preferred Taxon					
Determined Date	Full Date mm/dd/yyyy	Determiner	+	Type Status	

Important Notes

Preparation Type: Despite the "preptype" relationship field in Preparation being a "many-to-one" field type, it is shown as a pick list (using `uitype="combobox"`) as it uses a special pick list based on a field value in the 'preptype' table.

```
<cell type="label" labelfor="7"/>
<cell type="field" id="7" name="prepType" uitype="combobox"/>
```

Caption
Prep Type

Description
prepType

Length

Type
Many-to-one (PrepType)

☐ Hide Field

☒ Is Required

Field Format
☐ None

☒ Formatted

☒ Web Link

☒ Pick List

Precise Date Fields: Date fields that have "precision" date field (Year, Month/Year, Full Date) counterparts are defined in a special way. The date field (`df`) and precision date field (`tp`) must be defined within the `initialize` attribute.

Non-precise date fields can be shown without this initialize attribute.

```
<cell type="label" labelfor="5"/>
<cell type="field" id="5" uitype="plugin" name="this"
initialize="name=PartialDateUI;df=catalogedDate;tp=catalogedDatePrecision" uifieldformatter="Date" colspan="3"/>
```

Full Date

Month / Year

Year

Cataloged Date

Full Date

Mon / Year

Year

Show Values From Another Table

Using dot notation, you can show data from a related table as long as it has a **one-to-one** or **many-to-one** relationship.

Cat # 000041320 Accession # 2013-IC- Prev/Exch #
Cataloger Bentley Cat Date F 11/06/2013 Date 08/22/2013
▼ Determinations + -
Taxon Hoplerythrinus unitaeniatus In Question
Preferred Taxon Hoplerythrinus unitaeniatus Current
Determiner Bloom, Dc Date 10/04/2013 Type Status
Remarks
Field No:Locality DDB 13-14: 2013-08-22: Suriname, Sipaliwini: Small forest wetland about 10

If independent, it will be read-only.

If dependent, it will be editable.

You can show entire **subviews** or **query combo boxes** using this technique (e.g., **"currentDetermination.taxon.name"**)

```
<cell type="label" labelfor="ceStartDate"/>  
<cell type="field" id="ceStartDate" name="collectingevent.startDate" uitype="text"/>
```

```

<row>
  <cell type="label" labelfor="colls"/>
  <cell type="field" uitype="text" id="colls"
name="collectingEvent.collectors"/>
</row>

```

Collection Object: 000043082

Cat # 000043082 Accession # 2023-IC-044 Prev/Exch # WW-11

Cataloger Bentley, Andrew Cat Date Full Date 09/26/2023 Project Number

Collectors Hrabik, Robert; Chowning, Mark; Duvernell, David

Determinations

Taxon Ammocrypta vivax Current

Preferred Taxon Ammocrypta vivax

Date Full Date mm/dd/yyyy Determiner Type Status

Collecting Event WW 20-01; Crooked Creek, Castor River Diversion Channel; North America, United States, Missouri, Bollinger; 37.2171, -89.1

Preparations (1)

Object Type Count

Collecting Event: WW 20-01; Crooked Creek, Castor River Diversion Channel; North America, United States, Missouri, Bollinger; 37.2171, -89.8362

Field Number WW 20-01 Date Full D 09/26/2020 Start Time

Gear End Date Full D mm/dd/yyyy End Time

Locality Crooked Creek, Castor River Diversion Channel; North America, United States, Missouri

Remarks

Collecting Event Attribute

No Data.

Collectors (3)

Last Name	First Name	Remarks
Hrabik	Robert	
Chowning	Mark	
Duvernell	David	

Collection Objects

Cat # 000043080 Prev/Exch # WW-1 Collection Name KU Fish Vol Project Number

Attachments

Delete

Close Save

Relationship Form Fields

Collection Object: 000043082

Cat # 000043082 Geography North America, United States, Missouri, Bollinger

Cataloger Bentley, Andrew Cat Date Full Date 09/26/2023 Project Number

```
<row>  
  <cell type="label" labelfor="geog"/>  
  <cell type="field" uitype="text" id="geog"  
name="collectingEvent.locality.geography"/>  
</row>
```

See the (aggregated) Determinations and Preparations

Determinations

Taxon Elliptio hopetonensis

Preferred Taxon Elliptio hopetonensis

Author (I. Lea, 1838)

Record Set: Sample Set

Cat # 000043072 Accession # 2023-IC-044 Prev/Exch # SMCr-10

Cataloger Bentley, Andrew Cat Date Full Date 09/26/2023 Project Number

Collectors Landwer, Brett; Lee, Veronica; Duvernell, David

Determinations Lepomis megalotis (current) Yes

Preparations EtOH - 1; Skel - 5; X-Ray - 1

Determinations

Taxon Lepomis megalotis

Preferred Taxon Lepomis megalotis

Date Full Date mm/dd/yyyy Determiner Type Status

Collecting Event SMCr 20-01; South Moreau Creek, Moreau River; North America, United States, Missouri, Morgan; 38.3851, -92.6103

Preparations (3)

Object Type	Count	Current Count	Is On Loan	Preparation Attachments	Prepared By	Prepared Date	Storage
EtOH	1	1		0		mm/dd/yyyy	
Skel	5	5		0		mm/dd/yyyy	

```
<row>  
  <cell type="label" labelfor="dets"/>  
  <cell type="field" uitype="text" id="dets" name="determinations"/>  
</row>  
<row>  
  <cell type="label" labelfor="preps"/>  
  <cell type="field" uitype="text" id="preps" name="preparations"/>  
</row>
```

Show Taxon Author on Determination



Table Formats & Aggregation



Table Format

- This controls how data from a specific table is shown in query results, exports, and query combo boxes.
 - **It determines the fields to display and their order** from the chosen table.
 - Conditional formatting can be configured based on a field value in the record.
 - The default format is used in query combo boxes throughout the application.
 - It can be displayed in query results, data exports, and on forms.

The screenshot displays two overlapping 'Table Format' configuration windows. The background window is titled '(x) Table Format: Agent' and shows fields for 'Name' (with 'Agent' selected) and 'Title'. The foreground window is titled '(x) Table Format: Accession' and contains the following sections:

- Name:** A dropdown menu with 'Accession' selected.
- Title:** A dropdown menu with 'Accession' selected.
- Default:** A checked checkbox.
- Conditional Format:** An unchecked checkbox.
- Separator:** A dropdown menu with a checkmark icon.
- Field:** A dropdown menu with 'Accession #' selected, accompanied by a delete icon, an up arrow, and a down arrow.
- Add Field:** A button.
- Customize Field Formats:** An unchecked checkbox.
- Preview:** A section with the text 'Search your collection records to preview the record formatter' and a 'Search' button. Below the search bar, four records are listed: '2023-IC-051', '2023-IC-044', '2023-IC-035', and '2022-IC-048', each with a radio button to its left.
- Delete:** A red button at the bottom left.
- Close:** A button at the bottom right.

On the right side of the background window, a 'Format Preview' table is visible, showing a list of records with columns for 'Last Name', 'First Name', and 'Expand' (with a trash icon and a dropdown arrow). A 'Close' button is also present at the bottom right of this window.

Table Format

Table Format: Preparation

Name

Preparation

Title

Preparation

Default

Conditional Format

Separator

Field

PT Object Type

→

✓ (formatted)

-

✓ Count

Add Field

Customize Field Formats

Preview

Search your collection records to preview the record formatter

Search

C&S - 5

EtOH - 7

EtOH - 1

EtOH - 1

Delete

Close

Pre Query: New Query

Basic View

Hide Field Mapper

Save Query

Pre Preparation

✓ (formatted)

Count

Guid

Number of tubes

Prepared Date

Prepared Date (Day)

Prepared Date (Month)

Prepared Date (Year)

+

✓ (formatted)

CO Collection Object

→

✓ Cat #

→

Any

✓

✓

Results: (44840)

Create CSV

Create Record Set

Browse In Forms

	Pre Preparation	CO Cat #
☐	EtOH - 10	000008144
☐	EtOH - 15	000029353
☐	EtOH - 1	000002101
☐	EtOH - 2	000032743
☐	X-Ray - 1	000002518
☐	EtOH - 4	000013219
☐	EtOH - 5	000015535
☐	EtOH - 3	000033653
☐	EtOH - 14	000014402
☐	EtOH - 1	000008965
☐	EtOH - 2	000006882
☐	EtOH - 1	000005849
☐	EtOH - 12	000004616
☐	EtOH - 1	000014898
☐	EtOH - 5	000035412
☐	EtOH - 9	000018335
☐	EtOH - 2	000002543

Table Format Definition

(formatted) in Query

Query Results

Table Format

Table Format Definition

Table Format: CollectingEvent

Name

CollectingEvent

Title

CollectingEvent

☒ Default

☐ Conditional Format

Separator

Field

✓ Field Number

▼

;

Loc

Locality

▼

→

✓ Locality Name

▼

Loc

Locality

▼

→

Geo

Geography

▼

→

;

✓ Full Name

▼

;

Loc

Locality

▼

→

✓ Latitude1

▼

,

Loc

Locality

▼

→

✓ Longitude1

▼

Add Field

Preview

Search your collection records to preview the record formatter

Search

UE 92-01; About 50 miles South of the town of Kodiak, Kodiak Island; Pacific Ocean, United States, Alaska; 56.383333, -152.633333

JG 23-01; Mississippi River, Pool 17, North of Burlington, Iowa; North America, United States, Iowa, Des Moines; 41.19172778, -91.05791667

Delete

Close

Record Set: Sample Set

SN

CO

Tax

Loc

1 / 65

Cat #

000043082

Accession #

2023-IC-044

Prev/Exch #

WW-11

Cataloger

Bentley, Andrew

Cat Date

Full Date

09/26/2023

Project Number

▼ Determinations

Taxon

Ammocrypta vivax

Preferred Taxon

Ammocrypta vivax

Date

Full Date

mm/dd/yyyy

Determiner

Type Status

Collecting Event

WW 20-01; Crooked Creek, Castor River Diversion Channel; North America, United States, Missouri, Bollinger; 37.2171,

▼ Preparations (1)

Object Type	Count	Current Count:	Is On Loan	Preparation Attachments	Prepared By	Prepared Date	Storage
> EtOH	1	1	☐	0		mm/dd/yyyy	

Collecting Event Query Combo Box

Table Format: Collection Object

- The default Collection Object table format just displays the **Catalog Number** field.
 - Purely numeric catalog numbers have the leading zeros removed when displayed in a query as (formatted).
 - Simple setup that is representative of *most* table formats.

(x) Table Format: CollectionObject

Name

CollectionObject

Title

CollectionObject

☒ Default

☐ Conditional Format

Separator

Field

✓ Cat #

▼

Add Field

☐ Customize Field Formats

Preview

Search your collection records to preview the record formatter

Search

CO Cat #	CO Collection Object
000008144	8144
000029353	29353
000002101	2101
000032743	32743
000002518	2518
000013219	13219
000015535	15535
000033653	33653
000014402	14402

Table Format: Agent

- Agent uses a **conditional format**, meaning the format is dictated based on the value of a field in the Agent record.

- The "Agent Type" is a number value, but each represents a type of agent.

Value	Name
0	Organization
1	Person
2	Other
3	Group

- The table format for each record depends on the type.

- If the agent is a person (Agent Type = 1), it shows Last Name, First Name.
- For the other conditions, it just shows Last Name.

(x) Table Format: Agent

Name

Agent

Title

Agent

☒ Default

☒ Conditional Format

✓ Agent Type

▼

Conditional Field Value

Format Preview

Expand

0

Last Name

🗑️ ▼

1

Last Name, First Name

🗑️ ▼

2

Last Name

🗑️ ▼

3

Last Name

🗑️ ▼

Add Definition

Preview

Search your collection records to preview the record formatter

Search

👁️ May, Zachary

Condition Field Value: 1

👁️ Castro, L. Filipe

Condition Field Value: 1

👁️ Pereira, Daniel

Condition Field Value: 1

Delete

Close

Table Format: Agent

Within a conditional format, you can define multiple table formats that will display if the condition is met.

- The first conditional format will be used if there is no match.
- Only one field can be used to define a conditional format. It can be either a field in the table the format is being defined for or in a related table.

• *Conditional formats can be configured for any table.*

(x) Table Format: Agent

Name

Agent

Title

Agent

☒ Default

☒ Conditional Format

✓ Agent Type

▼

Condition Field Value

0

Delete Definition

^

This format will be used only if the condition field value equals this condition and is not null.

Separator

Field

✓ Last Name

▼

^

▼

Add Field

☐ Customize Field Formats

Condition Field Value

1

Delete Definition

^

This format will be used only if the condition field value equals this condition and is not null.

Separator

Field

✓ Last Name

▼

^

▼

✓ First Name

▼

^

▼

Add Field

☐ Customize Field Formats

Delete

Close

Table Format: Locality

- By default, the Locality table format is as follows:
 - Locality Name; Geography Full Name; Latitude 1, Longitude 1
- The "default" table format is used for query combo boxes. To customize what appears here, the table format must be modified:

Collecting Event: MC 05-04; Paine Creek, Metropark at Seeley Road; North America, United States, Ohio, Lake; 41.7208333333, -81.1761111111

Field Number: MC 05-04 Date: Full Date ▼ 06/09/2005 Start Time: Gear: End Date: Full Date ▼ 06/09/2005 End Time: Locality: Paine Creek, Metropark at Seeley Road; North America, United States, Ohio, Lake; 41.7208333333, -81.1761111111 Remarks:

(x) Table Format: Locality

Name: Locality

Title: Locality

☒ Default ☐ Conditional Format

Separator Field

	✓ Locality Name	→	✖	^	▼
;	Geo Geography		✖	^	▼
;	✓ Full Name		✖	^	▼
;	✓ Latitude1		✖	^	▼
,	✓ Longitude1		✖	^	▼

Add Field ☐ Customize Field Formats

Preview

Search your collection records to preview the record formatter

Search

- About 50 miles South of the town of Kodiak, Kodiak Island; Pacific Ocean, United States, Alaska; 56.383333, -152.633333
- Mississippi River, Pool 17, North of Burlington, Iowa; North America, United States, Iowa, Des Moines; 41.19172778, -91.05791667
- Upper Whitewater Creek, Whitewater River; North America, United States, Missouri, Bollinger; 37.4731, -89.8479
- Crooked Creek, Castor River Diversion Channel; North America, United States, Missouri, Bollinger; 37.2171, -89.8362

Delete Close

Table Aggregation

- **Table Aggregation:** This controls how multiple table records are consolidated together into a single text string.
 - Aggregation combines multiple **formatted records** into a single string.
 - The table format, separator, suffix, sort field, and record preview limit are customizable.
 - It can be displayed in query results and forms, used in table formats, and included in data exports.

The image displays two configuration windows side-by-side, illustrating the settings for Table Format and Table Aggregation.

Table Format: Preparation

- Name: Preparation
- Title: Preparation
- ☒ Default
- ☐ Conditional Format
- Separator: [Empty]
- Field: [PT] Object Type (dropdown), (formatted) (dropdown), Count (dropdown)
- Add Field
- Customize Field F
- Preview: Search your collection records to preview the record formatter. Search results: C&S - 5, EtOH - 7, EtOH - 1, EtOH - 1.
- Delete

Table Aggregation: Preparation

- Name: Preparation
- Title: Preparation
- ☒ Default
- ☐ Conditional Format
- Separator: ;
- Suffix: [Empty]
- Limit: 0
- Table Format: Preparation
- Sort Field: NONE SELECTED
- Preview: Search your collection records to preview the record formatter. Search results: C&S - 5; EtOH - 7; EtOH - 1; EtOH - 1.
- Delete
- Close

Table Aggregation

Table Aggregation: Preparation

Name

Preparation

Title

Preparation

Default

Separator

:

Suffix

Limit

0

Table Format

Preparation

Sort Field

NONE SELECTED

Preview

Search your collection records to preview the record format

Search

C&S - 5; EtOH - 7; EtOH - 1; EtOH - 1

Delete

Close

Table Aggregation Definition

Query: New Query

Basic View

Hide Field Mapper

Save Query

CO Collection Object

Collection Object Attachments

Cit Collection Object Citations

Det Determinations

DNA DNA Sequences

Agt Edited By

CR Left Side Rels

Pre Preparations

CR Right Side Rels

VR Voucher Relationships

→

Pre Preparation

(aggregated)

Count

Guid

Number of tubes

Prepared Date

Prepared Date (Day)

Prepared Date (Month)

Prepared Date (Year)

+

✓ Cat #

→ Any

✓

●

^

▼

Pre Preparations

→

✓ (aggregated)

✓

↓

^

▼

(aggregated) in Query

Results: (43572)

Create CSV

Create Record Set

Browse In Forms

		CO Cat #	Pre Preparations
☐		000005821	X-Ray - 1; Skel - 7; EtOH - 6
☐		000008146	X-Ray - 1; EtOH - 97; Skel - 3
☐		000001401	X-Ray - 1; EtOH - 94
☐		000002443	X-Ray - 1; EtOH - 94
☐		000004067	X-Ray - 1; EtOH - 94
☐		000004860	X-Ray - 1; EtOH - 9
☐		000002049	X-Ray - 1; EtOH - 9
☐		000004158	X-Ray - 1; EtOH - 9
☐		000002717	X-Ray - 1; EtOH - 85
☐		000004812	X-Ray - 1; EtOH - 84
☐		000007557	X-Ray - 1; EtOH - 81
☐		000003469	X-Ray - 1; EtOH - 80
☐		000001927	X-Ray - 1; EtOH - 8
☐		000004016	X-Ray - 1; EtOH - 8
☐		000004820	X-Ray - 1; EtOH - 8

Query Results

Using Table Formats and Aggregation

- When building queries, the **Table Format** for each table can be used in the results, shown as (formatted) in the list of fields and in the query itself.
- The **Table Aggregation** is shown as (aggregated) in the list of fields and in the query itself.

CO Query: New Query

CO Collection Object

✓ (formatted)

Cat #

Cat Date

Cat Date (Day)

Cat Date (Month)

Cat Date (Year)

+

✓ (formatted)

Aggt Cataloger

CE Collecting Event

Results: (43572) Create CSV Create Record Set Browse In Forms

CO	Collection Object	Aggt	Cataloger	CE	Collecting Event
☐	☐	37319	Luttrell, Geffery	001-RFM-04; Clear Fork Creek; North America, United States, Kansas, Pottawatomie; 39.5196647644, -96.3263320923	
☐	☐	39946	Bentley, Andrew	106-RFM-06; Yellowstone Creek; North America, United States, Kansas, Barber; 36.9995300000, -98.8509800000	
☐	☐	40682	Bentley, Andrew	RLM 10-81; Jacob Creek on County Road A; North America, United States, Kansas, Chase; 38.3515970000, -96.3551380000	
☐	☐	28892	Bentley, Andrew	DE-N-248; Narayani River, at Kanahaa River confluence; Asia, Nepal, Chitwan/Nawalparasi; 27.4833000000, 83.9400000000	
☐	☐	39703	Bentley, Andrew	TUU 49-33; Tributary of Waterfall Creek, 5 miles South of Idabel on Highway 87; North America, United States, Oklahoma, McCurtain; 33.8132209778, -94.8271636963	
☐	☐	38655	Bentley, Andrew	MC 05-04; Paine Creek, Metropark at Seeley Road; North America, United States, Ohio, Lake; 41.7208333333, -81.1761111111	

Pre Preparations

Aggt Edited By

Acc Accession #

CE Collecting Event

✓ (aggregated)

✓ (formatted)

✓ (formatted)

✓ (formatted)

(Formatted) and (Aggregated) Query Fields

- Fields added to a query that show the Table Format or Aggregation have a few special behaviors:
 - You cannot use search operators on these fields, though you can sort and hide.

	 Cat #	▼	→	Any	▼
	 Determinations	▼	→	 (aggregated)	▼
	 Preparations	▼	→	 (aggregated)	▼
	 Edited By	▼	→	 (formatted)	▼
	 Accession #	▼	→	 (formatted)	▼
	 Collecting Event	▼	→	 (formatted)	▼ 

- **(Formatted)** is shown as a field in a table if it is either
 - The base table
 - Related in a one-to-one or many-to-one way
- **(Aggregated)** is shown as a field in a table only if it is related via a one-to-many relationship (e.g. Preparations, Determinations, etc.)

(Formatted) and (Aggregated) Query Fields

- You can explicitly choose which **Table Format** or **Aggregation** to display if there is more than one defined for that table:

This is particularly useful when using the DwC export mechanism in Specify!



Once selected, the query item will show the gear with a yellow background to indicate a custom record format is selected.

Before You Edit Record Formatters

- To start configuring Table Formats and Aggregation, you need to first ensure that there is a **Record Formatters** app resource at the discipline level.
- If there is not one already, you will need to click **+ Add Resource** and create a new 'Record Formatters' resource.

The screenshot displays the 'Resources' interface with the 'App Resources' tab selected. The left sidebar lists 'Global Resources (0)' and 'Discipline Resources (0)'. Under 'Discipline Resources', 'Ichthyology (0)' is expanded, showing a '+ Add Resource' button and a list of existing resources: 'KUFishTeaching (0)', 'KUFishtissue (0)', and 'KUFishvoucher (0)'. The main content area shows 'DataObjFormatters' with tabs for 'Table Format (60)' and 'Table Aggregation (36)'. A text box explains: 'The "Table Format" controls how data from a specific table is shown in query result'. Below this, a list of resources is shown: 'Accession (1)', 'Accession Agent (1)', 'Accession Attachment', 'Accession Authorization', and 'Accession Citations'. A 'Select Resource Type' dialog is open, showing a list of resource types with their documentation links. The 'Record Formatters' type is highlighted in orange.

Type	Documentation
Label	Documentation
Report	Documentation
Default User Preferences	Documentation
Leaflet Layers	Documentation
RSS Export Feed	Documentation
Express Search Config	Documentation
Type Searches	Documentation
Web Links	Documentation
Field Formatters	Documentation
(x) Record Formatters	Documentation
Data Entry Tables	Documentation
Interactions Tables	Documentation

Editing Record Formatters

- There are two ways to edit the Table Formats and Aggregation within a discipline.
 - **App Resources:**
 - In the App Resources hierarchy, you can edit the "Record Formatters" app resource.
 - **Schema Config:**
 - For each table within the current discipline's schema, you can change, edit, or create the Table Format and Aggregation.

Resources Form Definition App Resources

Global Resources (0)
+ Add Resource

Discipline Resources (1)
Ichthyology (1)
(x) Record Formatters
+ Add Resource

KUFishTeaching (0)
KUFishtissue (0)
KUFishvoucher (0)

(x) DataObjFormatters
Table Format (60) Table Aggregation (36)

The "Table Format" controls how data from a specific table is displayed.

Accession (1)
Accession Agent (1)
Accession Attachment
Accession Authorization (1)
Accession Citations
Address (1)

Schema Config (English) Change Base Table

Table: collectionobject

Caption
Collection Object

Description
A general term for anything that can be a part of your collection: a specimen, a specimen lot, a sound recording, a slide, a tissue, an extract, or a spectrogram.

Table Format
CollectionObject

Table Aggregation
CollectionObject

Uniqueness Rules

Hide Table

Fields
altCatalogNumber
catalogedDate
catalogNumber
fieldNumber
guid
timestampModified
availability (hidden)
catalogedDatePrecision (hidden)
catalogedDateVerbatim (hidden)
collectionMemberId (hidden)
countAmt (hidden)
date1 (hidden)
date1Precision (hidden)
deaccessioned (hidden)
description (hidden)
embargoReason (hidden)
embargoReleaseDate (hidden)
embargoReleaseDatePrecision (hidden)
embargoStartDate (hidden)
embargoStartDatePrecision (hidden)
integer1 (hidden)
integer2 (hidden)

Editing Record Formatters: App Resources

- When editing record formatters in App Resources, you will see a list of all configured Table Formats and Table Aggregations.
- This works just like editing forms, where you can use the "Show All Tables" checkbox to find and create a Format or Aggregation for any given table.

(x) DataObjFormatters

Table Format (58)

Table Aggregation (34)

The "Table Aggregation" controls how multiple table record query results and table formats.

 Accession Agent (1)

 Accession Authorization (1)

 Address (1)

 Author (1)

 Collection Object (1)

 Collector (1)

 Determination (1)

 Extractor (1)

 Funding Agent (1)

 Loan Agent (1)

☐ Show All Tables

Editing Record Formatters: App Resources

- You can choose between which record formatters you wish to edit by selecting either **Table Format** or **Table Aggregation**.
- This app resource can be edited using either the visual editor or the XML editor.
- This app resource can be *copied and shared* between various disciplines in the Specify database.

(x) DataObjFormatters

Table Format (58)

Table Aggregation (34)

The "Table Aggregation" controls how multiple table record query results and table formats.

 Accession Agent (1)

 Accession Authorization (1)

 Address (1)

 Author (1)

 Collection Object (1)

 Collector (1)

 Determination (1)

 Extractor (1)

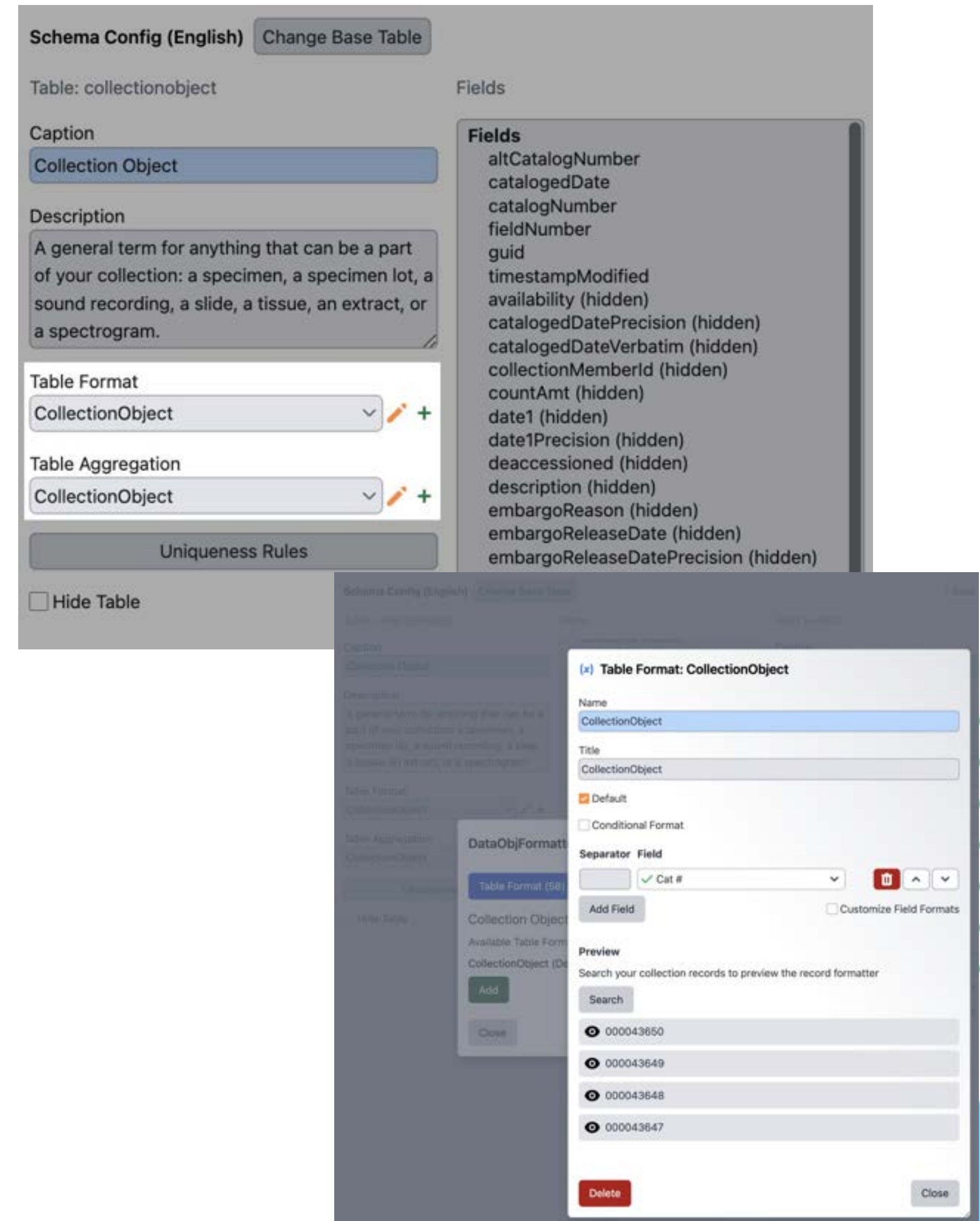
 Funding Agent (1)

 Loan Agent (1)

☐ Show All Tables

Editing Record Formatters: Schema Config

- After selecting a table in Schema Config, you can select, modify, or create a new Table Format and/or Aggregation for the table.
 - This allows users to modify just the table format or aggregation for the current table in an intuitive way.
 - Existing formatters can be edited with the  (pencil) icon or new ones can be created with the  (plus) icon!



The image shows two overlapping screenshots of the 'Schema Config' interface. The background screenshot displays the configuration for the 'collectionobject' table, including fields like 'altCatalogNumber', 'catalogedDate', and 'timestampModified'. The foreground screenshot is a modal titled 'Table Format: CollectionObject' where users can edit the 'Name' and 'Title' of the table format. It also includes a 'Separator' field set to 'Cat #' and a 'Preview' section showing a list of collection records with IDs like '000043650'.



Collection Relationships



Collection Object Relationships

Source: Fish Voucher Collection

Destination: Fish Tissue Collection

Record Set: Voucher Tissue

Cat # 000035591 Accession # 5115 Prev/Exch #

Cataloger Bentley, Andre Cat Date Full Date 03/19/2002

Determinations

Taxon Fundulus escambiae In question

Preferred Taxon Fundulus escambiae Current

Determiner Wiley, Edward O Date Full Date mm/dd/yyyy Type Status

Remarks

Field No: EOW 88-17: 1988-07-16: North America, United States, Alabama, Baldwin: Dyas Creek on Baldwin c Locality

Preparations (1)

Object Type	Count	Actual Count	Is On Loan	Prepared Date	Voucher Storage	Remarks	Preparation Attachments
EtOH	3	3		mm/dd/yyyy	Jar		0

Tissues:

Collection Object	Collection
000006582	KU Fish Tissue Collection
000006585	KU Fish Tissue Collection
000006580	KU Fish Tissue Collection
000006584	KU Fish Tissue Collection
000006583	KU Fish Tissue Collection
000006578	KU Fish Tissue Collection
000000633	KU Fish Tissue Collection
000006579	KU Fish Tissue Collection
000006581	KU Fish Tissue Collection
000006577	KU Fish Tissue Collection
000009406	KU Fish Tissue Collection
000009407	KU Fish Tissue Collection
000009410	KU Fish Tissue Collection
000009409	KU Fish Tissue Collection
000009408	KU Fish Tissue Collection

Collection Object: 000006585

Cat # 000006585 Accession # 5121 Voucher KUI 35591

Cataloger Bentley, Andre Cat Date Full Date mm/dd/yyyy Voucher: 000035591

Determinations

Taxon Fundulus escambiae In question

Preferred Taxon Fundulus escambiae Current

Determiner Wiley, Edward O Date Full Date mm/dd/yyyy Type Status

Remarks

Field No: EOW 88-17: 1988-07-16: North America, United States, Alabama, Baldwin: Dyas Creek on Baldwin cour Locality

Preparations (1)

Object Type	Count	Actual Count	Number of tubes	Prepared Date	Used up?	Remarks	Tissue storage	Preparation Attachments
Tissue	100	100	1	mm/dd/yyyy			G12	0

Col Obj Attribute

Restriction/Permission/Notification

Preservation Frozen in liqui Tissue type Whole sp. Other ID #

Size Sex

Attachments

CT Scan

Edited By Bentley, Andrew C Date Edited 01/17/2019

GUID 5dfc5f48-ea1d-4a78-b847-38c8c7be9384

Collection Relationship Form Plugins

- On the Collecting Event Attribute form, the Collection Relationship name needs to be set inside the **relName=** attribute within **initialize=""**.

```
<row>
  <cell type="label" label="Host Taxon"/>
  <cell type="field" id="hostTaxon" uitype="plugin" name="this"
initialize="name=HostTaxonPlugin;relName=hostPlant" colspan="5"/>
</row>
```

- The query combo box for Host Taxon looks up taxon records from the linked collection.

The screenshot displays the 'New Collecting Information' form. It includes input fields for 'Collector Number', 'Date of Collection' (with a date picker), 'Collection Method', and 'End Date' (with a date picker). There are also text areas for 'Locality Details' and 'Locality and Habitat Notes'. Below these are expandable sections: 'Collectors (0)' with a plus sign, 'Collection Objects' with plus and minus signs, 'Attachments' with a 'CE 0' button, and 'Collecting Event Attribute' with plus and minus signs. The 'Collecting Event Attribute' section contains a 'Host Taxon' field with a query icon (magnifying glass) and a plus sign.

Collection Relationship Form Plugins

CollectionRelOneToManyPlugin
Object Relationship

Right Side (Destination)
Catalog Number & Collection

Collection Object	Collection
-------------------	------------

000002428	KU Fish Tissue Collection	
000002555	KU Fish Tissue Collection	
000002426	KU Fish Tissue Collection	
000002427	KU Fish Tissue Collection	
000002429	KU Fish Tissue Collection	

+

```
<cell type="field" id="colrel" uitype="plugin" name="this"
initialize="name=CollectionRelOneToManyPlugin;relname=Has Tissue;" colspan="9"/>
```

Host Taxon

Collection Objects can be linked to **host taxonomy** within the **same discipline** or to a **different discipline**.



Subgenus	Species
	panicornis Hood, 1912 (0)
	pallidicollis Hood, 1934 (0)
	pallidulus Bagnall, 1924 (0)
	pallisetis Sakimura, 1969 (0)
	palmerae Reyes, 1994 (0)
	palmi Karny, 1925 (70)
	paludosus Bagnall, 1913 (0)
	palustris Reuter, 1899 (0)
	panousei zur Strassen, 1968 (0)

Discipline:
Entomology

Taxon

Thrips palmi

Preferred Taxon

Thrips palmi

Method

Morphological

Determined Date

Full D

2010-02-17

Determiner

Beach, Jim

Collecting information

Method

Interception

Date Collected

Full D

2025-02-15

Country of origin

Indonesia

Short Notes

Source

Host plant

Country of detection

United States

Original preservation

Ethanol 10%

Collecting information comments

Collectors

No Data.

Host Plant

Host Plant Name

Dendrobium

Host Plant Part

Leaves

Discipline:
Host Plants

Subgenus	Genus
	> Degranvillea Determann (0, 0)
	> Deiregyne Schltr. (0, 0)
	> Dendrobium Sw. (0, 0)
	> Dendrolirium Blume (0, 0)
	> Dendrophylax Rchb.f. (0, 0)
	> Devogelia Schuit. (0, 0)
	> Diaphananthe Schltr. (0, 0)
	> Diceratostele Summerh. (0, 0)
	> Dichaea Lindl. (0, 0)

Collection Relationship Form Plugins

ColRelTypePlugin
Object Relationship

Voucher: 000026922

Left Side (Source) Catalog Number

```
<cell type="field" id="colrel" uitype="plugin" name="this"  
initialize="name=ColRelTypePlugin;relname=Has Tissue;"/>
```



Panels & Conditional Forms



Panels

- Panels are cells that allow users to further divide the table into smaller columns and rows.



- An optional **panelType** attribute is supported.
 - If **panelType="buttonbar"**, then the panel will be horizontally centered on the page.
- Rows are specified as children of the **<cell>** tag.

```
<row>
  <cell type="panel" coldef="150px,2px,100px,2px,100px,2px,100px"
colspan="14">
    <rows>
      <row>
        <cell type="label" labelfor="t1"/>
        <cell type="field" id="t1" name="text1" uitype="text"/>
        <cell type="label" labelfor="t2"/>
        <cell type="field" id="t2" name="text2" uitype="text"
colspan="3"/>
      </row>
      <row>
        <cell type="label" labelfor="t3"/>
        <cell type="field" id="t3" name="text3" uitype="text"/>
        <cell type="label" labelfor="t4"/>
        <cell type="field" id="t4" name="text4" uitype="text"
colspan="3"/>
      </row>
    </rows>
  </cell>
</row>
```

Panels

- Panels can have independent column definitions given inside of a **coldef=""** attribute.
- This enables users to define sections of the form that display independently of the full view definition's column definition.

CollectionObject Delete Definition

← CollectionObject Show Data Model Field Names

```
24 <cell type="field" id="2" name="projectNumber" uitype="text"/>
25 </row>
26 <row>
27 <cell type="panel" coldef="100px,2px,200px,2px,100px,2px,200px" colspan="14">
28 <rows>
29 <row>
30 <cell type="label" labelfor="t1"/>
31 <cell type="field" id="t1" name="text1" uitype="text"/>
32 <cell type="label" labelfor="t2"/>
33 <cell type="field" id="t2" name="text2" uitype="text" colspan="3"/>
34 </row>
35 <row>
36 <cell type="label" labelfor="t3"/>
    "t3" name="text3" uitype="text"/>
    elfor="t4"/>
```

div.grid.items-center.p-1.-ml-1.gap-2.w-full 1041.18 x 745.82

Cat #	#####	Accession #		Prev/Exch #	
Cat Date	Full Date	mm/dd/yyyy	Project Number		
Text1		Text2			
Text3		Text4			

div.grid.items-center.p-1.-ml-1.gap-2.w-full 1033.19 x 79.94

Cat #	#####	Accession #		Prev/Exch #	
Cataloger	User, Test	Cat Date	Full Date	mm/dd/yyyy	Project Number
Text1				Text2	
Text3				Text4	

Panels

Other cells can be placed within the same row as a panel, enabling complex form designs that "escape" from the standard grid of columns and rows.

In the same row

CO

CollectionObject

Delete Definition

←

CollectionObject

↔

Show Data Model Field Names

26

<row>

27

<cell type="panel" coldef="100px,2px,200px,2px,100px,2px,200px" colspan="8">

28

<rows>

29

<row>

30

<cell type="label" labelfor="t1"/>

31

<cell type="field" id="t1" name="text1" uitype="text"/>

32

<cell type="label" labelfor="t2"/>

33

<cell type="field" id="t2" name="text2" uitype="text" colspan="3"/>

34

</row>

35

<row>

36

<cell type="label" labelfor="t3"/>

37

<cell type="field" id="t3" name="text3" uitype="text"/>

38

<cell type="label" labelfor="t4"/>

39

<cell type="field" id="t4" name="text4" uitype="text" colspan="3"/>

40

</row>

41

</rows>

42

</cell>

43

<cell type="subview" id="attachments" viewname="ObjectAttachment" name="collectionObjectAttachments" colspan="7">

Cat #

#####

Accession #

Prev/Exch #

Cataloger

User, Test

Cat Date

Full Date

mm/dd/yyyy

Project Number

Text1

Text2

Text3

Text4

Collection Object Attachments

Choose a file or drag it here

Conditional Forms

- Within a panel, forms can be modified to support **conditional rendering**.
 - The `condition=""` attribute can be applied to a set of rows within a panel.
 - The set of rows with no condition will be used if the condition is not met *or* when using Specify 6.

```
<row>
  <cell type="panel" coldef="100px,2px,76px" colspan="6">
    <rows>
      <!-- This view definition will be displayed in Specify 6, or if all
other conditions don't match -->
      <row>
        <cell type="label" labelfor="fieldNumber"/>
        <cell type="field" id="fieldNumber" name="fieldNumber" uitype="text"
readonly="true"/>
      </row>
    </rows>
    <!-- This definition will only be displayed if fieldNumber is 2 -->
    <rows condition="fieldNumber=2">
      <row>
        <cell type="label" label="Field Number is 2!" />
      </row>
    </rows>
    <!-- Condition can be in a related table. Aggregator and formatter are
called automatically when necessary -->
    <rows condition="accession.accessionNumber=1111-11-11">
      <row>
        <cell type="label" label="Accession Number is 1111-11-11!" />
      </row>
    </rows>
  </cell>
</row>
```

Conditional Forms

```
<cell type="panel" coldef="100px,2px,76px" colspan="6">
  <rows>
    <!-- This view definition will be displayed in Specify 6, or if all other conditions don't match -->
    <row>
      <cell type="label" label="This is not the current determination." />
    </row>
  </rows>
  <!-- This definition will only be displayed if isCurrent is true -->
  <rows condition="isCurrent=Yes">
    <row>
      <cell type="label" label="This is the current determination." />
    </row>
  </rows>
</cell>
</row>
```

Taxon    ☐ Current This is not the current determination.

Preferred Taxon

Date

Full Date 

06/25/2024 

 Determiner    Type Status

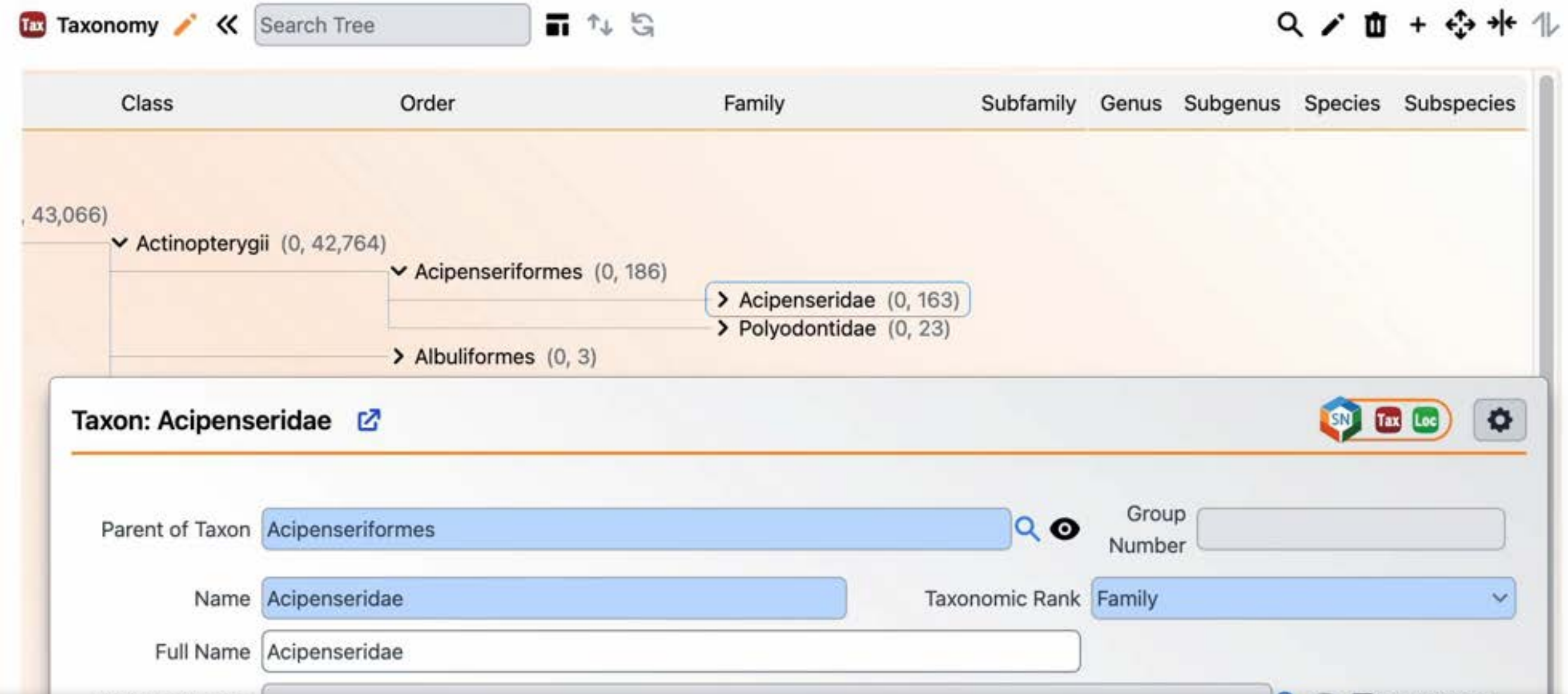


Conditions can be based on *text and number fields, pick list values, and boolean checkboxes.*

Conditional Forms

- Conditions can *reference fields from other tables*.

For instance, a field like "Group Number" could only be shown when the rank is "Family"



The screenshot shows a taxonomy browser interface. At the top, there's a search bar and navigation icons. Below it, a hierarchical tree of taxa is displayed. The 'Acipenseridae' family is selected, and a modal form for editing the taxon is shown. The form includes fields for 'Parent of Taxon', 'Name', 'Full Name', 'Group Number', and 'Taxonomic Rank'. The 'Taxonomic Rank' is set to 'Family'.

```
<row>
  <cell type="label" labelfor="parent"/>
  <cell type="field" id="parent" uitype="querycbx" isrequired="true" colspan="3"
initialize="name=Taxon;title=Taxon;editbtn=false;newbtn=false;editoncreate=true"
name="parent"/>
  <cell type="panel" coldef="115px,2px,375px" colspan="3">
    <rows>
      <row/> <!-- When no condition is met, show an empty row -->
    </rows>
    <rows condition="definitionItem.Name=Family"> <!-- Show this row when rank = Family -->
      <row>
        <cell type="label" labelfor="grpNumber"/>
        <cell type="field" id="grpNumber" name="groupNumber" uitype="text" colspan="1"/>
      </row>
    </rows>
  </cell>
</row>
```

Conditional Forms

- You can choose to show a different subview based on a conditional field value.
- *Can be extended infinitely.*

PrA Preparation Attribute

← Tables

PreparationAttributes

PreparationAttributes_WetCount

PreparationAttributes_Embedded

PreparationAttributes_MicroscopeSlides

PreparationAttributes_SEMStub

PreparationAttributes_Tissues

PreparationAttributes_GlochidialSample

PreparationAttributes_DryShellSingle

Create

New Collection Object

Catalog Number

#####

Accession

Cit

0

CO

0

Required Format: #####.

▼ Determinations +

No Data.

Collecting Event Info

Collecting Event

▼ Collecting Event +

No Data.

▼ Preparations (0) +

No Data.

Total Items:

Total Current Items:

Oversize Boxes

Jars of Wets

Oversize Jars

Remarks

OrigCatNo

Cataloger

Nate Shoobs

Cataloged Date

06/25/2024

Cataloged Date

Verbatim

OrigLabelVerbatim

Modified By Agent

Modified Date

mm/dd/yyyy

GUID

☒ Generate Label on Save

Generate Label

Clone

Add

Save