



Australian Speleological Federation Karst Index Database Documentation

Updating People

ASF: <http://www.caves.org.au>
For KID version: 1.28
Date of this manual: May 2, 2006
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ASF Karst Index Database Tutorial on Updating People

Preliminaries

There are two Karst Index Databases: The production KID is at: <http://www.caves.org.au/kid>. The other one is the development KID at: <http://www.caves.org.au:8080/kid>. Note the :8080 on the second web address.

Logging in under your updater login to the development database and playing with the functionality of the updating screens can be used to familiarise yourself with updating procedures and the use of this software. All ASF updaters should avail themselves of this. That means that you may see data in the development KID change in unexpected ways - it's because many people are using it for familiarisation.

You should therefore try and limit your changes to the areas and people that you would be updating in the real, production database.

Logging into either Database as an Updater

When you go to the ASF's KID page at <http://www.caves.org.au:8080/kid> or <http://www.caves.org.au:8080/kid> the usual Welcome page will be shown. There will be no link `Update` shown.



The reason for this is that at this stage you are effectively a guest user and guests cannot see any updating functions. You have to first login as an updater.

Click on the `Search` link. A dialog box will ask for a username and password. Enter your updaters username and password. The top row will now change to show you as logged in and the link to `Update` will now be visible.



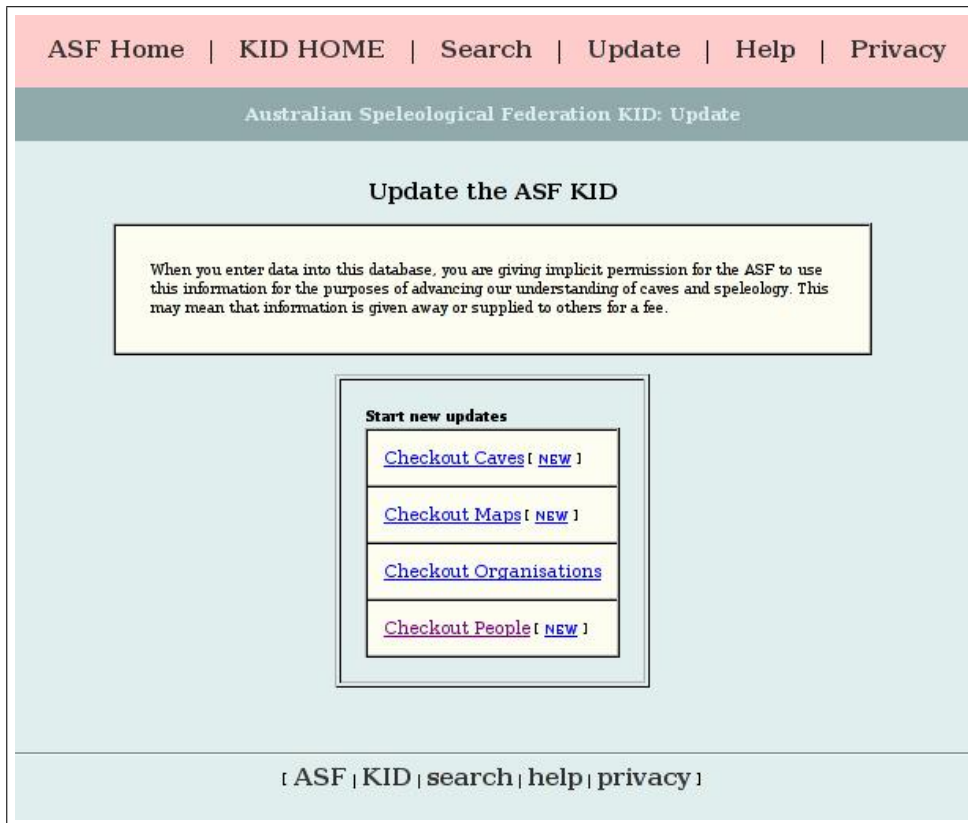
If `Update` is not present it means that you are probably logged in as a 'Guest' user. Guest users can't update the production KID so that link item does not appear. If you have logged in as a guest user you will need to close your web browser, start it up again, and re-login with your updater login name.

Once you are logged in as an updater click on the 'Update' link at the top of the page. The page titled 'Update the ASF KID' will appear.

Part I – Update

This tutorial is in two parts. In this first part an updater, Jill Rowling, logs in and makes changes to a persons data. In the second part another updater, Philip Maynard, logs in and checks Jill’s updates.

If you are logged in as an updater then there will be an “Update” link at the top of the page. Clicking this will bring you to the starting point for updating caves, maps, organisations and people. This is called the ‘Update Home Page’.



ASF Home | KID HOME | Search | Update | Help | Privacy

Australian Speleological Federation KID: Update

Update the ASF KID

When you enter data into this database, you are giving implicit permission for the ASF to use this information for the purposes of advancing our understanding of caves and speleology. This may mean that information is given away or supplied to others for a fee.

Start new updates

- [Checkout Caves \[NEW \]](#)
- [Checkout Maps \[NEW \]](#)
- [Checkout Organisations](#)
- [Checkout People \[NEW \]](#)

[ASF | KID | search | help | privacy]

There are two links for people; `CheckoutPeople` and `[New]`. `CheckoutPeople` is used for updating the details for persons that already exist in the database. The link `[New]` is used to create new records for people that do not already exist in the database.

Click on `CheckoutPeople` now and proceed to the next page.

Person Checkout Part 1: Begin Checkout Wizard

The work flow of an update begins with checking out a record. When you checkout a record of a cave(s), a person(s) or other entities that record is then locked so that only you have write access to it. Others can still read the data but other updaters, including State Coordinators, cannot edit it whilst you 'own' the record. Even if you just checkout a few fields you will own the entire record.

TODO: explain here what checkout and checkin mean ?

When you have finished making your editing changes you need to check-in the record. That is done automatically when TODO

The web-based KID requests information via a series of dialog screens, commonly known as a 'Wizard'. The first screen of the data entry wizard asks for the source of the data so that any queries about the correctness of the data can be followed up to the source.

Who is keying in this data?

This will show your name and will display a list of the organisations that you are a member of.

Who has supplied this data update?

This drop down list will list all persons who are in the database no matter what organisation they are in. This is because an update may be supplied by anyone.

TODO FID [76] 'Latest update by'

Person Checkout Part 1: Begin Checkout Wizard

1. Set Data Source and Attribution

Who is keying in this data?

Keyed in by: Jill Rowling Select your organisation's initials: SUSS

Who has supplied this data update?

Update supplied by: ROWLING, jill of THORNLEIGH

Next

Hint: The drop down list of persons is very long, however there is a shortcut you can use to select a person. Let's suppose I wish to select 'ROWLING, Jill of THORNLEIGH'. Place the mouse focus on the 'Update supplied by' field, hold down the shift key and enter the first few letters of the persons name i.e. ROW. The drop down list box will jump to each matching person entry as you enter each letter.

Click on Next now and proceed to the next page.

Person Checkout Part 2: Search and Set Checkin

Person Checkout Part 2: Search and Set Checkin

1. Set Data Source and Attribution

Who is keying in this data?
Keyed in by: Jill Rowling Organisation: SUSS

Who has supplied this data update?
Update supplied by: ROWLING, Jill of THORNLEIGH
Date update supplied: 1 | Jul | 2005

What is the organisation that this update will be attributed to? SUSS

2. Search for People to Checkout

Surname:

State:

City:

First name:

Middle initial:

Organisations:

Search Help
Surname: required, partial match is fine.
State: required.
Other fields are optional.

3. Set the Checkin Date

Today's date: 4 Jul 2005

Estimated checkin date:
10 | Jul | 2005

Note: If you do not checkin your update when the checkin date arrives your update will be cancelled. The default is 31 days from now.

Continue to next checkout page >

Setting the data source and attribution

Who has supplied this data update will be filled in from the previous screen however you need to enter the date on which the data was supplied to you.

TODO [424] Update - date

TODO [425] Update - person

TODO [428] Key-in - person ID

Next you need to enter the organisation that this update will be attributed to. Data is always attributed to an organisation – not to individuals. The organisation that you select here will receive the cudos of having made the data update.

The data source and attribution is now set and we can move onto selecting the person(s) to update.

Search for people to checkout

You must enter a persons surname and their state. You can enter more than one surname though. The search can be narrowed by entering a city, first name, or an organisation that they belong to. It doesn't matter too much if your search here yields a few too many persons as you will be able to futher limit your selection later on.

Set the check-in date

Finally you have to set an estimated checkin date. This is very important. It is here to stop updaters from checking out records and never finishing their updates.

If you have not committed your updates before this date your updates will be dropped and the records that are checked out to you will be made available again.

Person Checkout Part 3: Select Fields

At this point you can select one or more of the persons selected in the previous screen. For instance in the example shown above you might wish to only edit one of the Smiths selected previously. Use Control-mouse click to select as many entries as required.

Select the fields that you wish to update then press Next.

Person Checkout Part 4: Confirm Checkout

This screen allows you to review the person(s) that will be checked out and the fields selected for editing.

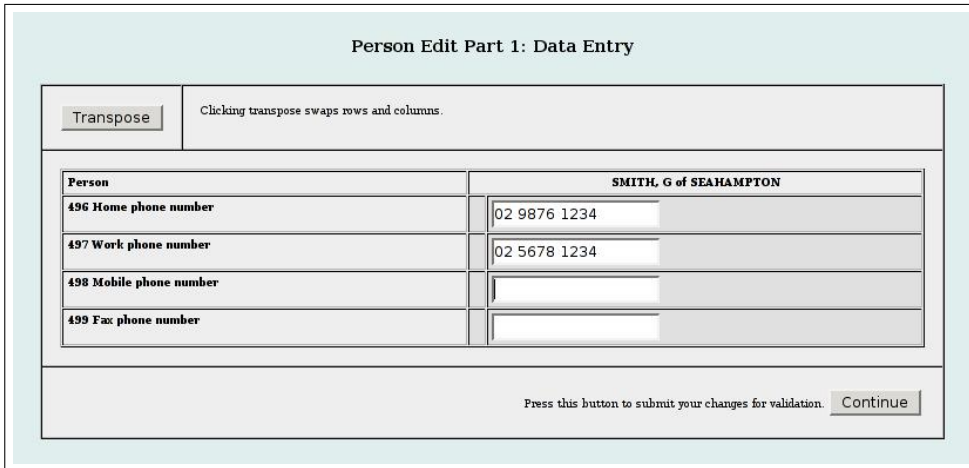
The top dropdown list shows the person(s) that will be checked out. The second drop down list shows the fields that you intend to edit. At this stage they are not yet actually checked out. They will be checked out when you click the [OK] button.

Some explanation of categories and fields is probably appropriate at this point. Fields that you can update are collected into categories. For instance in the category PHONE are four fields: [496] Home phone number, [497] Work phone number, [498] Mobile phone number and [499] Fax phone number. The number in square brackets is the International Union of Speleology, Informatics Commission (UISIC) field code. You can lookup the definition of any UISIC field (called a FID for Field Identification) and view its properties by going to the documentation page of the ASF KID at <http://www.caves.org.au/kid/doc>.

The categories are purely an ASF categorisation.

Click OK to proceed. This will commit your checkout.

Person Edit Part 1: Data Entry



You can click the [Transpose] button to swap the rows and columns. This is useful if you have checked out many people but have only a few fields to edit. You may use the transpose button to flip between the two views of the data but only before you have done any editing.

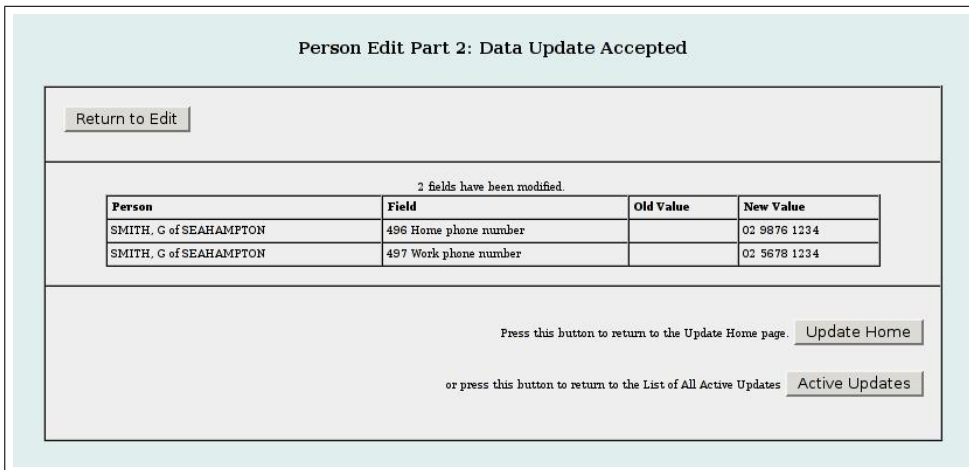
Warning: Do not click transpose after you have made editing changes. The transpose button will return to page to its original state and any editing changes will be lost.

Click Continue to proceed. This will commit your changes.

Person Edit Part 2: Data Update Accepted

This screen shows that your update has been accepted and it will show the changes to the data that you have made.

TODO: show an example of an error?



Clicking the [Update Home Page] button will return you to the Update Home Page again, as shown on page 3.

Clicking the [Active Updates] button will take you to a screen showing you all of your current updates which are waiting to be checked. At this stage we should explain checking.

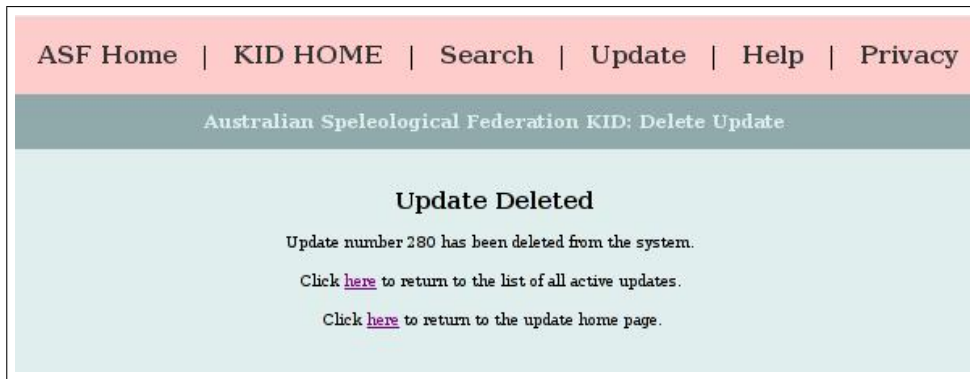
The ASF's KID uses a peer review checking system. In this system updaters make changes to the data in the KID but all data changes must be checked by another updater before they are incorporated into the database.

If you clicked [Update Home Page] you will be at Update Home Page as in the following figure. You will see that your update is now listed. You can view or edit your current updates as many times as you wish.

If you clicked on the [Active Updates] button you will be at a page that lists all of your current updates i.e. the your updates that are still to be checked.

estkey	Key	Field name	Old value	New value	User name	Change date	Status
AJASF01074	SMITH, G of SEAHAMPTON	Work phone number		02 5678 1234	jillr	2005-07-04	later
AJASF01074	SMITH, G of SEAHAMPTON	Home phone number		02 9876 1234	jillr	2005-07-04	later

From this screen you can click edit to make changes to your previous update. The delete link can be used to totally delete an update. If you delete an update you will get a confirmation of that deletion.

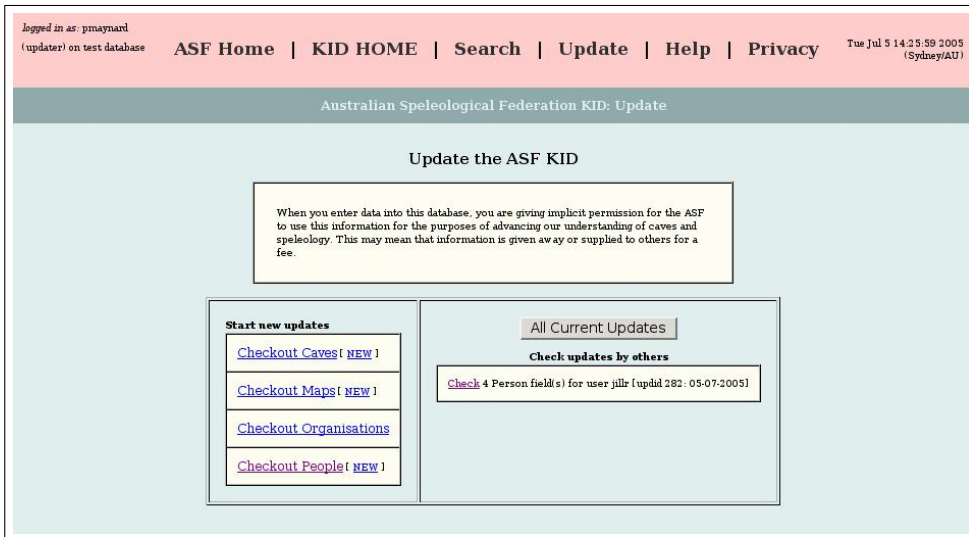


If you now go to the Update Home Page or the page listing all of your current updates you will see that the deleted update is no longer listed. An other updater will notice that the update is no longer listed on their list to be checked.

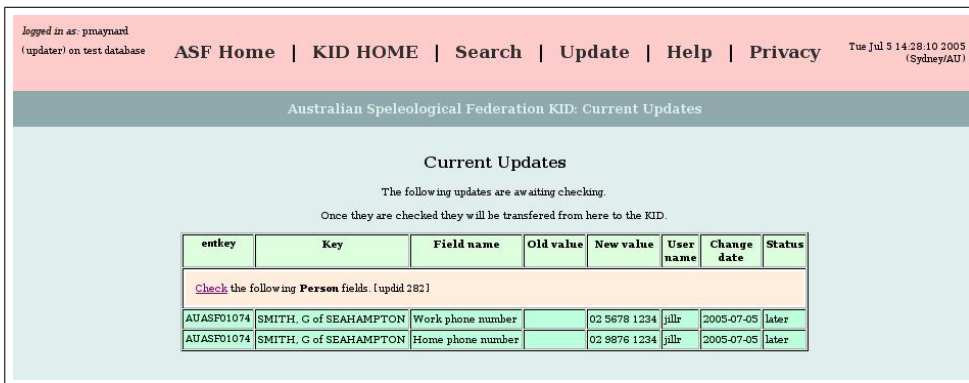
Part II – Checking Updates

The updates in the previous section were done by **Jill Rowling**. These updates cannot be checked by Jill but can be checked by **Philip Maynard**.

You will notice in the figure below that the updater that is logged in is user pmaynard. Philips screen also shows that there are person updates by Jill Rowling that he can check i.e. there is a ‘Check’ link saying ‘Check 4 person fields for user jillr’. If you refer back to the screen for user Jill Rowling on page 8 you will see that her screen shows an update link to her updates and not a check link.



Clicking the [Active Updates] button will take you to the list of all the current updates. It will show you the updates done by you that you can edit and the updates done by other updaters that you can check.



Click ‘Check’ to proceed.

You are now at the check page where you can accept the update(s), reject the update(s) or select later which will allow you to postpone making a decision.

The interface provides considerable flexibility in how you check the updates. You can accept all the updates at once by clicking the [Accept All] button or reject all of the updates by clicking the [Reject All] button. Clicking [Use Selections Below] allows you full control to accept or reject individual updates .

logged in as: pmaynard
(updater) on test database ASF Home | KID HOME | Search | Update | Help | Privacy Tue Jul 5 14:29:26 2005 (Sydney/AU)

Australian Speleological Federation KID: Check a Person Update

Check a Person Update

Fields changed by updater Jill Rowling for organisation SUSS since 05-07-2005. [updid:282]

Return to All Current Updates | Update Home | Accept All | Reject All | Use Selections Below

entkey	Key	Field name	Old value	New value	Change date	Later/OK=Accept X=Reject
AUASF01074	SMITH, G of SEAHAMPTON	Mobile phone number				Later OK X
AUASF01074	SMITH, G of SEAHAMPTON	Fax phone number				Later OK X
AUASF01074	SMITH, G of SEAHAMPTON	Work phone number		02 5678 1234	2005-07-05	Later OK X
AUASF01074	SMITH, G of SEAHAMPTON	Home phone number		02 9876 1234	2005-07-05	Later OK X

Fields that an updater has changed are shown in a pink color. In this example we click the [Accept All] button to accept the two changes to the telephone numbers.

logged in as: pmaynard
(updater) on test database ASF Home | KID HOME | Search | Update | Help | Privacy Tue Jul 5 14:31:54 2005 (Sydney/AU)

Australian Speleological Federation KID: Check a Person Update

Check a Person Update

Fields changed by updater Jill Rowling for organisation SUSS since 05-07-2005. [updid:282]

Return to All Current Updates | Update Home | Accept All | Reject All | Use Selections Below

entkey	Key	Field name	Old value	New value	Change date	Later/OK=Accept X=Reject
AUASF01074	SMITH, G of SEAHAMPTON	Mobile phone number				OK - updated complete
AUASF01074	SMITH, G of SEAHAMPTON	Fax phone number				OK - updated complete
AUASF01074	SMITH, G of SEAHAMPTON	Work phone number		02 5678 1234	2005-07-05	OK - updated complete
AUASF01074	SMITH, G of SEAHAMPTON	Home phone number		02 9876 1234	2005-07-05	OK - updated complete

After the changes are accepted the color will change to grey and the status text will change to 'OK update complete'. The new data will now be visible from a KID search.