



# MORPHO 1.9.0 USER GUIDE

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KNOWLEDGE NETWORK FOR BIOCOMPLEXITY

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# 1 Introduction

The Morpho User Guide is provided to assist scientists who want to use the Morpho application locally or both locally and on a network to manage, discover, and share data sets.

If you cannot find the information you are looking for in the User Guide, please contact [morpho-dev@ecoinformatics.org](mailto:morpho-dev@ecoinformatics.org).

## 1.1 What is Morpho?

Created for scientists, Morpho is a user-friendly application designed to facilitate the creation of metadata (information that describes your data) so that you and others can easily locate and determine the nature of a wide range of data sets. By specifying some basic information (a title and abstract, for example) about your data in a uniform, standardized way, you or any one you have granted permission to access your data will be able to find and view the data. When you create a metadata file that explains what your data represent and how they are organized, you are not only better able to manage the data, you help other scientists discover and understand them too.

Morpho interfaces with the Knowledge Network for Biocomplexity (KNB) Metacat server, which is essentially a server from which scientists can upload, download, store, query and view relevant metadata and data. Once you have annotated your data with metadata, you can choose to upload your data—or just your data description (the metadata)—to the Metacat server, where they can be accessed from the web by selected colleagues or by the public if you so choose. Data stored on the Metacat server is saved on several geographically separate servers, ensuring that data are archived securely.

Morpho and Metacat are part of the Knowledge Network for Biocomplexity (KNB), a national network intended to facilitate ecological and environmental research on biocomplexity.

## 1.2 Terms you need to know

Throughout this guide, we refer to [metadata](#) and [data package](#). Both terms are briefly defined below.

### **1.2.1 Metadata**

In Morpho, the metadata—or data describing data—contains information about the content of a data set (its owner, administrator, geographic extent, units, etc) as well as who has access to the data (the owner, selected users, or the public). This information is stored in a file that conforms to the Ecological Metadata Language (EML) specification, which is commonly used to exchange information among scientists across the world.

When you use one of Morpho's easy-to-use wizards to create a metadata file, Morpho automatically takes the values you enter and generates the metadata file in the proper format. The metadata file is stored on your local system and/or on the KNB network. Metadata can be "packaged" with the data set, or can stand alone much like an abstract describing the contents of a paper.

The Morpho wizards create metadata files using a subset of Ecological Metadata Language (EML), a metadata specification developed by ecology discipline but that has since gained wider usage. EML is based on prior work done by the Ecological Society of America and associated efforts (Michener et al., 1997, *Ecological Applications* 7: 330-342). For more information about EML, see <http://knb.ecoinformatics.org/software/eml/>

### **1.2.2 Data Package**

Data packages are the logical units that Morpho creates to represent a collection of metadata and (optionally) data files. At its most basic, a data package consists only of high-level documentation: metadata about a data collection's title and abstract, keywords, people and organizations, usage rights, research project information, coverage details, methods and sampling, and access information. Once a basic data package has been created, you can add metadata for the individual data tables (row and column information) and optionally include the data tables themselves in the package.

Data packages can be uploaded to the KNB network and shared with colleagues, or stored locally on your system.

## 2 Getting Started

Morpho is available for Linux, Windows, and Mac. Multi-lingual support is provided for the following languages:

- Chinese
- English
- French
- Japanese
- Portuguese
- Spanish

### 2.1 System Requirements

Recommended system requirements for running Morpho:

- a minimum of 256 MB of RAM
- a minimum of 700MHz CPU
- Java 1.6 or greater

Morpho will run on slower systems with less RAM, but some operations may be very slow. More RAM is especially useful if there are a large number of local data packages, since local data are cached in RAM at startup.

### 2.2 Downloading and Installing Morpho

To download Morpho, go to <http://knb.ecoinformatics.org/morphoportal.jsp> and choose the link corresponding to your platform (Morpho can be used on Windows, Linux, and Mac). You will need to have Java 1.6 or later installed on your system.

If you have used a previous version of Morpho, we recommend that you uninstall it before installing a new version. You will be able to uninstall the old version and install the newer one without losing any locally stored data packages.

Note that Morpho will search and display older EML packages (e.g., 2.0 or Beta 6) as EML 2.0. If a package does not use the latest EML format,

Morpho will prompt users to transform the EML to the latest version. If you choose to upgrade the EML to the latest version, you must save the data package to preserve the changes, at which time the revision number of the document will be incremented. If a user chooses to upgrade the EML and the upgraded EML document is invalid (e.g., a required metadata field is blank), a correction wizard opens to allow users to fix the problem. For more information, please see [section 12](#).

## **2.3 Before you Begin**

Before you can start using Morpho, you must create a user profile, which is used by the application to manage your data packages. You may choose to create multiple user profiles to manage different collections of data, or use one profile for all your Morpho work.

In order to take advantage of Morpho's useful network functionality, you must also register for the KNB network. Because you are prompted to enter information about your KNB account when you create a user profile, we recommend that you first register with the KNB Network before creating a user profile.

### **2.3.1 Register for the KNB Network**

Registering with the KNB network allows you to take advantage of the advanced storage, access, and querying capabilities provided by the Metacat server. If you do not have access to the Internet, or you do not want to register for the KNB, Morpho will still work, but you will only be able to store your metadata files locally, and will not be able to log in to the KNB to create or edit data sets that are stored remotely.

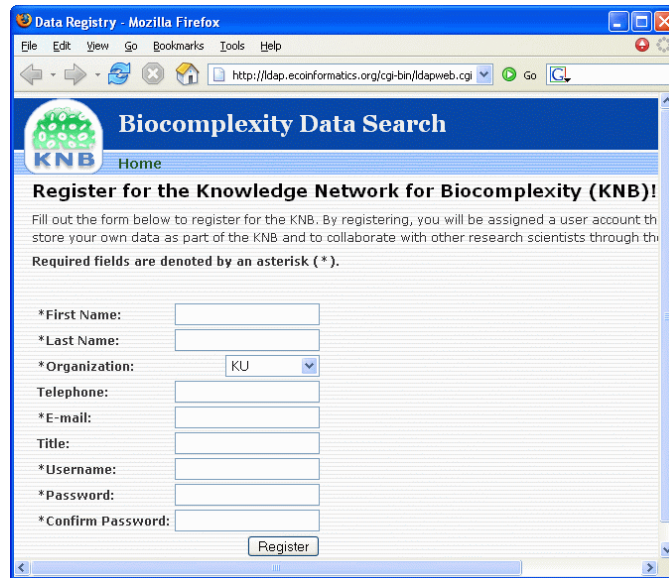
To register for the KNB network, go to <http://knb.ecoinformatics.org/>, select the 'Create new account' link, and fill out the form ([Figure 2.1](#)). Write down your user name and password as you will need this information when you create a Morpho user profile.

### **2.3.2 Create a User Profile**

The user profile allows you to use Morpho locally on your personal computer and, once registered for the KNB (see [2.3.1](#)), to create, access, edit, and search for metadata and data on the KNB.

First-time users will automatically be prompted to create a new profile when they open Morpho. Users upgrading Morpho from a previous version





**Figure 2.1:** Registering for the KNB network

may also be prompted to create a new profile. To continue using your old profile(s) (so that your locally-stored data continue to be visible), simply enter a “new profile” with the same user name as the old one (e.g., if your old profile is named “jdoe”, then enter “jdoe” as the name of the new profile). Click “Yes” when prompted, to confirm that you would like to use the existing profile. Note: You must be logged in to your computer with the same account under which your old profile existed.

**To create a user profile:**

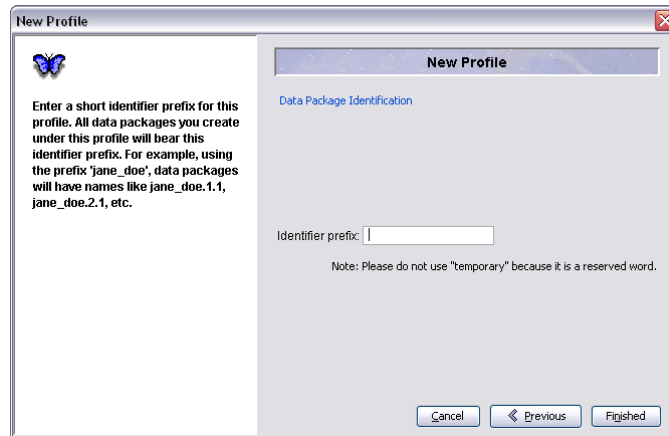
1. On the “Basic Information” screen of the New Profile wizard ([Figure 2.2](#)), enter your profile name and your first and last names. Your profile name does *not* have to be the same as your KNB username. Click “Next.”
2. On the “Network Account Information” screen ([Figure 2.3](#)), enter your KNB username and the organization you selected when you [registered for the KNB](#). If your organization is not listed, click the Refresh button to look up the most recent account information. Click “Next.”
3. On the “Data Package Identification” screen ([Figure 2.4](#)), enter a short identifier prefix. The identifier prefix will be used to create IDs for

The screenshot shows a dialog box titled "New Profile" with a butterfly icon. On the left, it says "Enter the name for this profile and your first and last name." On the right, under "Basic Information", there are three input fields: "Name of profile:", "First name:", and "Last name:". At the bottom are "Cancel", "Previous", and "Next" buttons.

Figure 2.2: Step 1: Create a profile name.

The screenshot shows the same "New Profile" dialog box, but now it is titled "Network Account Information". The left text says: "Enter the information you submitted when you registered for the Knowledge Network for Biocomplexity (KNB). If you have not registered for the KNB yet, go to: <http://knb.ecoinformatics.org>. This will allow you to login to the network and collaborate with other researchers through the KNB." On the right, there are three fields: "Username:" with a text input, "Organization:" with a dropdown menu showing "unaffiliated", "NCEAS", and "LTER", and "Refresh:" with a "Refresh" button. At the bottom are "Cancel", "Previous", and "Next" buttons.

Figure 2.3: Step 2: Enter your KNB username and organization.



**Figure 2.4:** Step 3: Specify an identifier prefix.

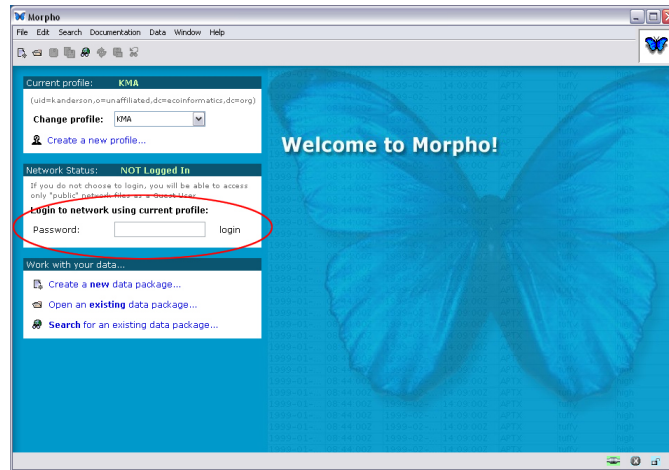
metadata documents you create in Morpho, and for data tables or other data files you import using Morpho. For example, specifying the prefix “jane\_doe” will result in document IDs like jane\_doe.1.1, jane\_doe.2.1, etc. ***Do not use the reserved prefix “temporary”.*** Other non-alphanumeric characters like periods, commas, and quotation marks are also not allowed in the prefix.

4. Click “Finished” to complete the profile.

**NOTE** The Morpho interface currently supports deleting profiles that you no longer need through the Remove Profile menu item from the File menu (see [section 2.5](#)). **However, if you delete a profile, you also delete all local copies of data packages created or saved using that profile.** Unless you first extract the data packages and save them elsewhere on your computer (or to a network server, like Metacat), you may lose data.

## 2.4 Logging In

After you have created a user profile (see [section 2.3](#)), you will see the Main Morpho screen. Enter your KNB password in the “Network Status” panel and click “Login” ([Figure 2.5](#)). If you choose not to log in, you will be able to create, edit, search, access, and manage data that are stored locally, and may search for public data sets on the KNB network. However, you will not be allowed to create or edit data sets on the KNB network.



**Figure 2.5:** Log in to the KNB network.

## 2.5 Removing a profile

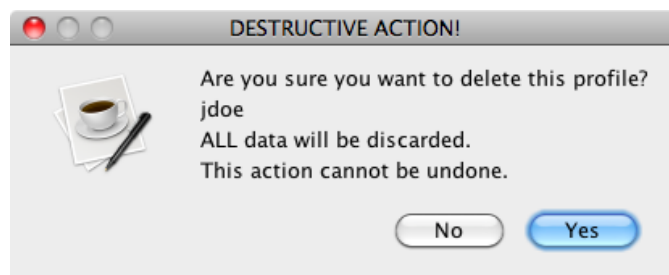
Profiles may be removed from Morpho if they are no longer needed. When you remove a profile, all the metadata and data that has been created with that profile is deleted locally. Network copies remain untouched.

### To remove a user profile:

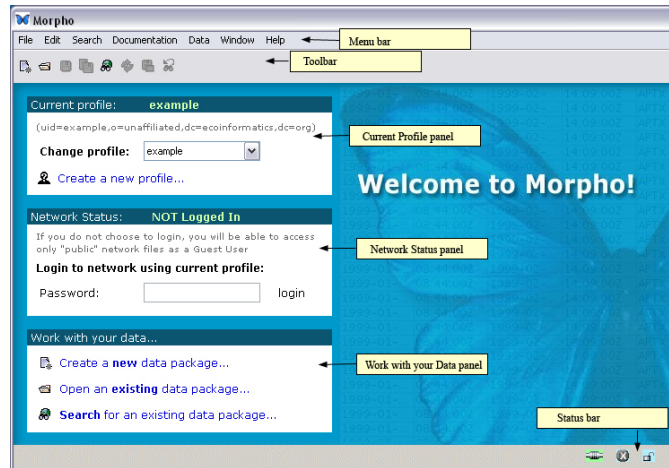
1. From the File menu, choose “Remove profile”
2. Select the profile that should be removed ([Figure 2.6](#)). Note: The current active profile cannot be removed (switch to a different profile in order to remove it).
3. Confirm the removal in the dialog box ([Figure 2.7](#)).



**Figure 2.6:** Select profile to remove



**Figure 2.7:** Confirm profile removal.



**Figure 3.1:** Main Morpho screen with interface components highlighted.

## 3 The Morpho Interface: The Main Screen

After you have opened Morpho and created a profile, you will see the Main Morpho screen (Figure 3.1). The screen provides access to all of the most commonly used Morpho functionality, via the three panels on the left side of the screen ([Current profile](#), [Network Status](#), and [Work with your data...](#)), the menu items in the [Menu bar](#), and the shortcut buttons in the [Toolbar](#). The [Status Bar](#) at the bottom of the screen contains information about the current status of various Morpho settings and parameters.

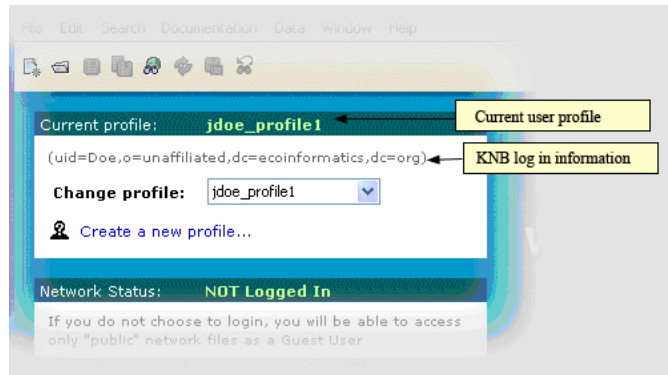
### 3.1 Panels

The Main Morpho screen contains three panels designed to help you easily log in to a network, select or change a profile, and access the most common Morpho functions.

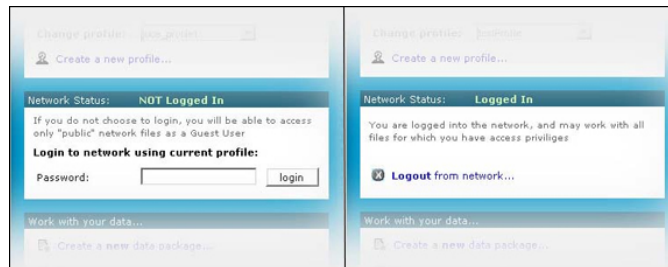
#### 3.1.1 Current Profile Panel

The Current Profile panel (Figure 3.2) contains information about your current user profile as well as the KNB login information associated with that profile. Your KNB username is the name appearing after the “uid=” just below the title bar of the “Current Profile” panel.

Use the drop-down menu beside “Change profile...” to select a different profile, or click the “Create a new profile...” link to create a new profile.



**Figure 3.2:** The Current Profile panel from the Main Morpho screen.



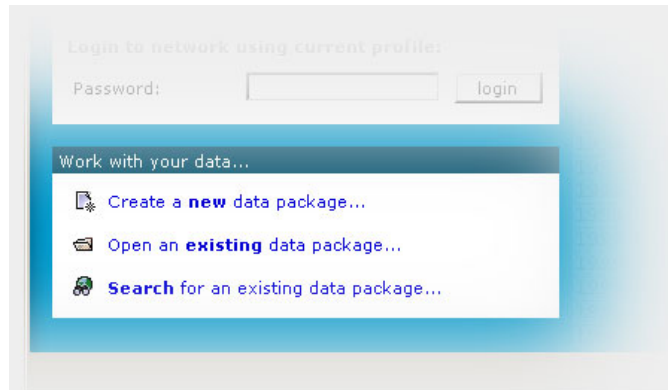
**Figure 3.3:** The Network Status panel from the Main Morpho screen. The image on the left displays the panel as it appears when not logged in to the KNB network. The image on the right displays the panel as it appears when logged in to the network.

You may wish to create new profiles to allow different users to use the same copy of Morpho or to manage different projects, for example.

### 3.1.2 Network Status Panel

The Network Status panel displays the current network status and allows you to log in and out of the KNB network. The panel offers different options depending on whether or not you are logged in to the network (Figure 3.3).

If you are not logged in to the KNB network, you can log in by typing your KNB password in the “Password” field and clicking the “Login” button. You will be logged in with the KNB username associated with the current profile (the KNB account information is displayed in the “Current Profile” panel). Note that the KNB username is not necessarily the same as your user profile name. Log out at any time by clicking “Logout from network.”



**Figure 3.4:** The Work with your data panel from the Main Morpho screen.

### 3.1.3 Work with Your Data Panel

The “Work with your data. . .” panel (Figure 3.4) allows you to easily access the most common features of Morpho. Click any of the links [Create a new data package](#), [Open an existing data package](#), or [Search for an existing data package](#) (both locally and on the KNB network) to start working. Detailed descriptions of these functions are provided later in the guide.

## 3.2 Menu bar

The menus in the Menu bar allow you to access all the available Morpho operations. Each of the menus – File, Edit, Search, Documentation, Data, Window, and Help – is discussed in more detail below.

### 3.2.1 File menu

Use the File menu (Figure 3.5) to create a new data package, open an existing data package, log in and out of the KNB network, create a new user profile, save a data package, delete a data package, print documentation, set preferences, and exit Morpho, among other options.

### 3.2.2 Edit menu

Use the Edit menu (Figure 3.6) to cut, copy or paste items, as well as reverse changes you have made to a data table or to a set of data tables.



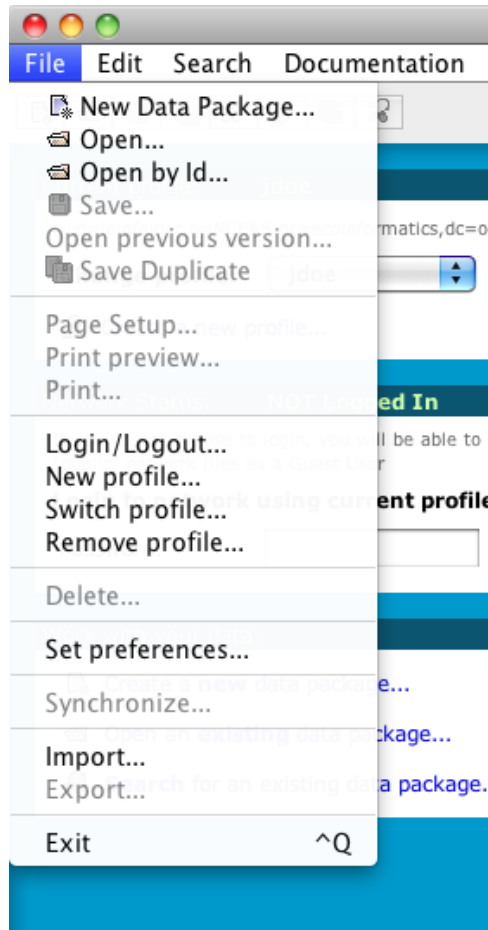


Figure 3.5: The File menu

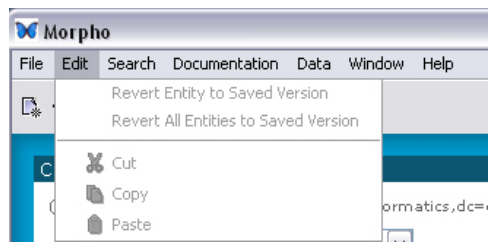
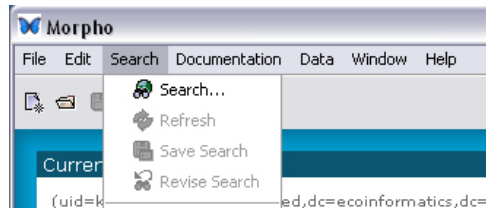
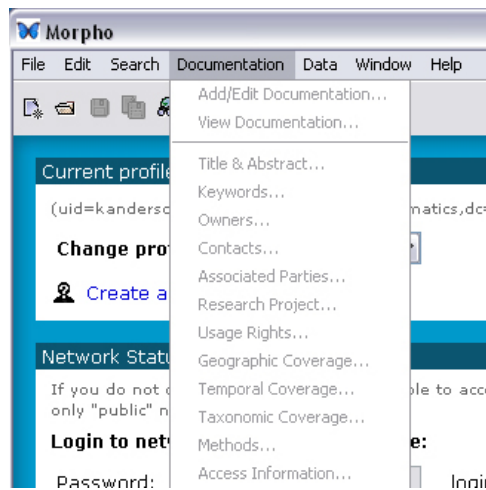


Figure 3.6: The Edit menu



**Figure 3.7:** The Search menu.



**Figure 3.8:** The Documentation menu

### 3.2.3 Search menu

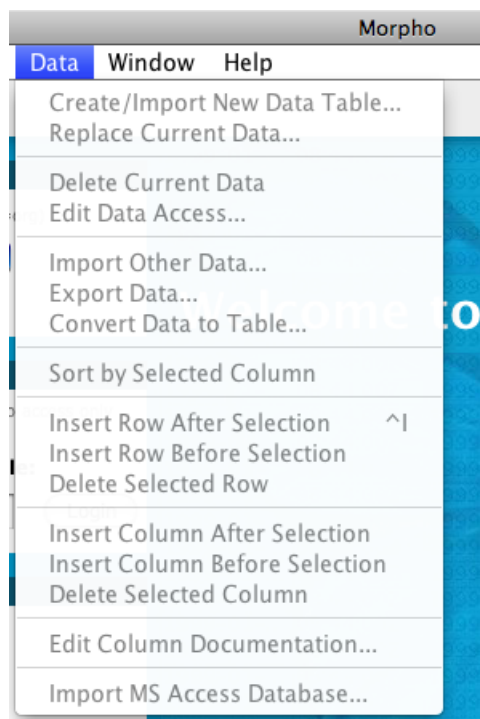
Use the Search menu (Figure 3.7) to search for data packages, save a search for future use, refine a search by changing search parameters, or refresh the current search.

### 3.2.4 Documentation menu

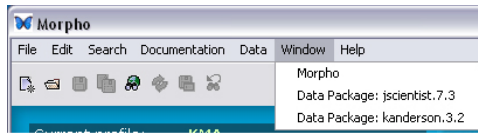
Use the Documentation menu (Figure 3.8) to add, delete, or change a variety of different types of documentation (metadata) for your data package.

### 3.2.5 Data menu

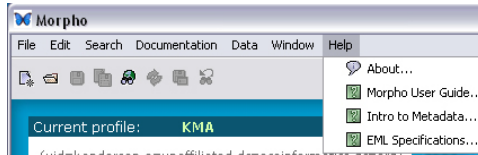
Use the Data menu (Figure 3.9) to import data (e.g., a data table or an image) or create a data table. You can also edit and manipulate the data in a data table or add or edit the table documentation.



**Figure 3.9:** The Data menu



**Figure 3.10:** The Window menu.



**Figure 3.11:** The Help menu

### 3.2.6 Window menu

Use the Window menu ([Figure 3.10](#)) to view open Morpho windows.

### 3.2.7 Help menu







Use the Help menu ([Figure 3.11](#)) to access the Morpho User Guide (which is what you are now reading). The “About...” item contains general information about Morpho. The “Intro to Metadata...” document explains what metadata is and why it is important, as well as some of the challenges associated with creating it, what Ecological Metadata Language (EML) is, and how it is used. The EML Specification contains information about each EML module and how it is used.

## 3.3 Toolbar

The Toolbar ([Figure 3.12](#)) contains shortcut buttons to the most commonly-used Menu items. Each button is described in [Table 1](#). To display the purpose of a Morpho button, simply place your mouse cursor over the button. A small pop-up reminder will display the purpose of the button.



**Figure 3.12:** The Morpho Toolbar



Button	Description
	The “Create a new data package” button starts a wizard that guides you through the process of creating a new data package.
	The “Open...” button opens an existing data package (provided you have adequate access permissions).
	The “Save...” button saves the current data package either locally or on the network.
	The “Duplicate this data package and save locally” button copies the current data package. The duplicate can be used as a template to create similar data packages.
	The “Search for data” button begins the data package search process. If logged in to the KNB, you can search both locally and on the KNB network.
	The “Refresh”, “Save search,” and “Revise search” buttons are enabled only when the screen contains search results.

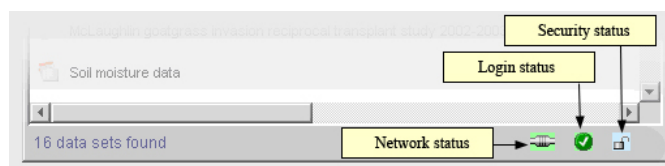
**Table 1:** The Toolbar buttons

### 3.4 Status Bar

The status bar at the bottom of the Morpho window ([Figure 3.13](#)) contains information about the current status of various Morpho settings and parameters.



#### Network Status

-  Network connection available
-  Network connection not available





**Figure 3.13:** The Morpho Status bar.

### **Login Status**

-  Logged in to network
-  Not logged in to network

### **Security**


-  Using secure (SSL) connection
-  Not using secure (SSL) connection

## 4 Opening and Viewing a Data Package

Existing data packages, which consist of metadata and (optionally) the data set described by the metadata, are easily opened and viewed in Morpho. Whether your data package is stored locally, on the network, or both, you can easily open it with Morpho's Data Package viewer. If you have permission to access the data, you can also open data packages created by other scientists.



### 4.1 Opening Data Packages

To open a data package that you have created, use one of the following techniques:





- click the “Open an existing data package...” on the “Work with your data” panel on the Main Morpho screen,
- select the “Open” menu item from the File menu,
- click the  icon in the Toolbar.

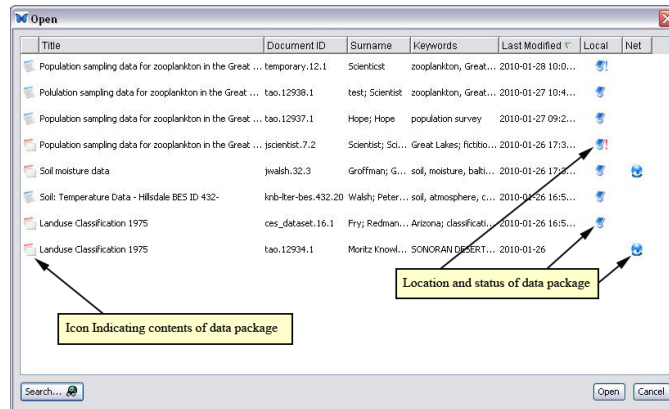
You will then see a listing of the available data packages ([Figure 4.1](#)). Available data packages include those which you previously created using the current profile and/or under the current KNB username, along with a fictitious sample data package included with Morpho – “Population sampling data for zooplankton in the Great Lakes, 2000”.

The icons in the first column of the Open Data Package screen tell you if the package contains:

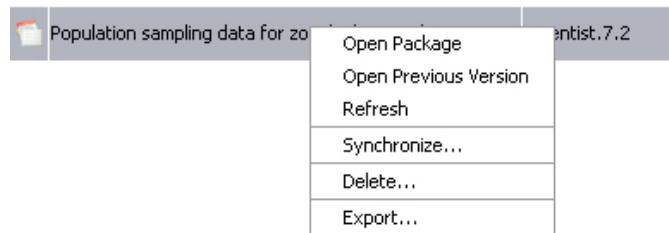
-  Data and documentation
-  Documentation only

Icons in the last two columns indicate the location and status of the package:

-  Local data package
-  Saved incomplete data package
-  Network data package
-  Recovered incomplete data package



**Figure 4.1:** An example listing of available data packages displayed in Morpho's Open screen.



**Figure 4.2:** Right-click a data package to open an action menu.

For more information about saved and recovered incomplete data package, please see [section 6.3](#) and [section 6.4](#).

Select a data package to open (or open the fictitious sample package “Population sampling data for zooplankton in the Great Lakes, 2000”). To open a selected package, click the “Open” button located at the bottom right of the screen, or double-click the selected data package, or right-click the data package and select “Open Package” ([Figure 4.2](#)). You can also open an earlier version of the data package (if any exist) by right-clicking the package and selecting “Open Previous Version.” Note that one or more previous versions of the data package may be unavailable, for example, a version saved only locally on a different computer. The Refresh command updates the listing of available packages.



**NOTE** Morpho automatically displays data packages stored in earlier versions of EML (e.g., 2.0 or Beta 6) as EML 2.0. If a package does not use the latest EML format, Morpho will prompt users to transform the EML to the latest version. If you choose to transform the EML, you will need to save the data package to preserve the changes, at which time the revision number of the document will be incremented. If the updated EML document is invalid (e.g., a required metadata field is blank), a correction wizard opens to allow users to fix the problem. For more information, please see [section 12](#).

#### 4.1.1 Opening a Shared Data Package

To locate and view data packages other than those you have created, use the [Search](#) feature, which is described later in this guide. You can only open and view data packages for which you have been granted permission. If you do not have permission to open a data package, it will not appear in your search results.

**NOTE** If you are not logged in to the KNB, but have network access, the only network data packages that will appear in your search are those that have “public” access privileges. To view additional data sets from the KNB network, log in to the network.

#### 4.1.2 Opening a Data Package by Package Id

Data packages may quickly be opened using their “Package Id”. This is the unique identifier assigned to the data package when it is created. The package id “jscientist.7.2” is a combination of three fields:

- scope or identifier prefix (jscientist)
- id (7)
- revision (2)

To open a data package by id, select the “File > Open by Id” option. Note: all three parts of the package id are required. Local and network copies can be opened, but protected data packages on the network can only be opened if a user with appropriate permissions is currently logged in.

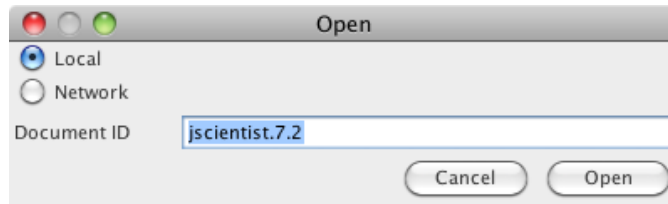


Figure 4.3: Open a data package by package id.

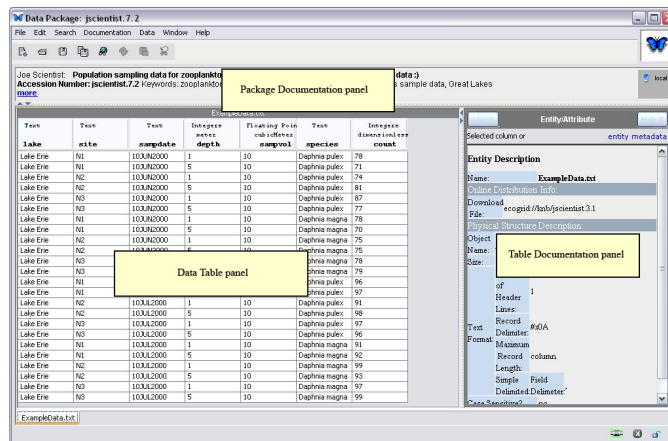


Figure 4.4: Viewing a data package in Morpho's Data Package interface.

## 4.2 Viewing a Data Package: The Data Package Interface

When you open a data package, Morpho displays it in the Data Package interface (Figure 4.4). The Data Package interface contains the standard Menu bar and Toolbar as well as three panels: the [Package Documentation panel](#), the [Data Table panel](#), and the [Table Documentation panel](#).

### 4.2.1 Package Documentation panel

The Package Documentation panel contains a brief “citation-style” summary of the data package: its title, description, usage information, etc. The icons on the right side of the panel indicate whether the package is located on the local machine, on the network, or both (Figure 4.5). No icons will appear if the data package has not yet been saved, or has been modified since it was last saved.

The Package Documentation panel can be expanded to reveal additional documentation, either by dragging the horizontal drag bar, or by click-

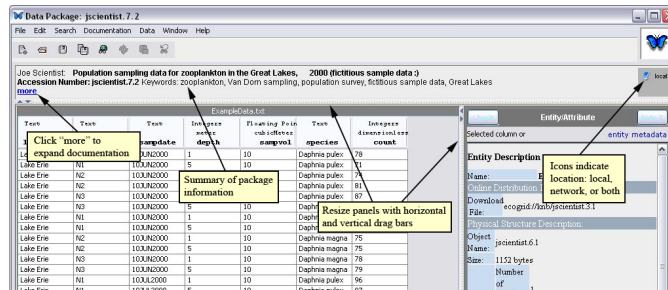


Figure 4.5: The Data Package panel.

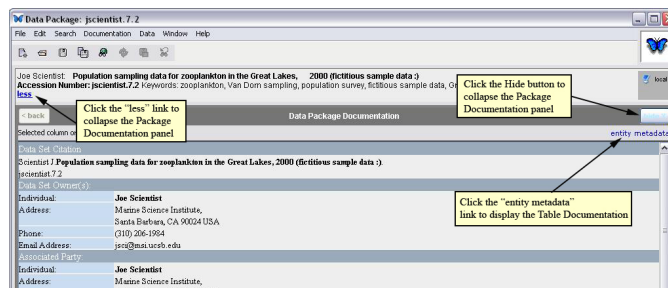


Figure 4.6: The Package Documentation panel after it has been expanded.

ing the “more” link (Figure 4.6).

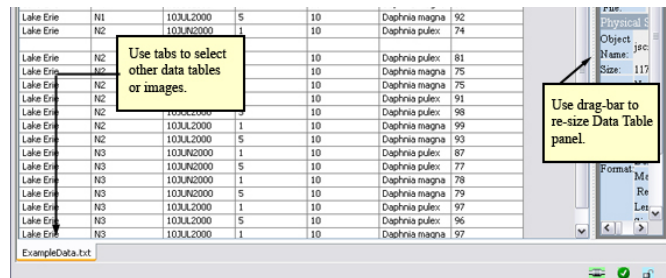
To collapse the Package Documentation panel:

- click the “less” link
- click the “hide” button
- use the mouse to drag the divider bar from the bottom of the screen
- click the small arrow icon located on the left side of the divider bar

#### 4.2.2 Data Table panel

The Data Table panel (Figure 4.7) displays tabular data in spreadsheet form or image data (for several formats of image entities). Use the tabs along the bottom of the Data Table panel to select and view different data tables or image entities contained in the data package. Use the drag bar on the right side of the panel to collapse, expand, or change the size of the panel.

Click a table cell to edit the data directly. To save changes, use the Save option under the File menu. To cancel all changes that have been made to the current panel, choose “Revert Entity to Saved Version” under the Edit



**Figure 4.7:** The Data Table panel.

menu. Note that it is not currently possible to undo individual changes made to a panel. To cancel changes that have been made to ALL data panels, select “Revert all Entities to Saved Version” under the Edit menu.

Right-click the data table to display a menu that allows you to:

- sort columns
- insert and delete rows
- insert and delete columns
- delete the entire table
- add new tables
- add/edit documentation

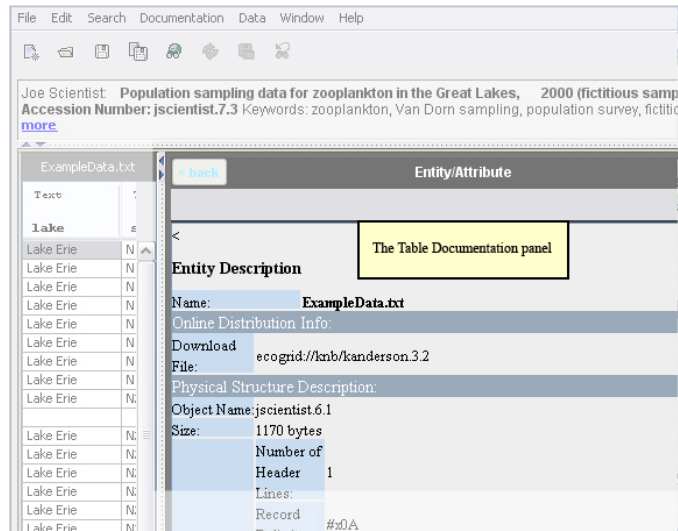
These same options are also available under the Data menu in the Menu bar. Read more about using these tools in [section 7.12](#).

### 4.2.3 Table Documentation panel

The Table Documentation panel ([Figure 4.8](#)) displays documentation for the currently displayed table. Note that tables are also referred to as “entities” in Morpho, using terminology consistent with database management systems. Similarly, “attributes” refers to table columns (also called “variables”).

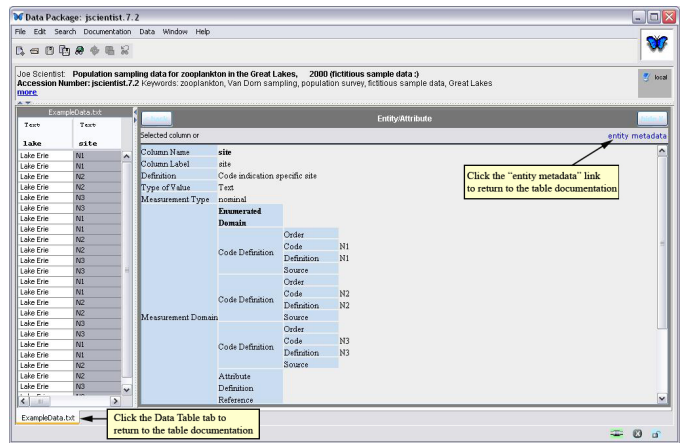
Click any column header in the Data Table panel to display more specific information about the selected column in the Table Documentation panel ([Figure 4.9](#)).

Return to the table documentation by clicking the Data Table tab at the bottom of the Data Table panel or on the “entity metadata” link. The “Back” button works like the back button in a web browser; if you have viewed several columns of data documentation, the back button will step back through those column descriptions before returning to the table documentation.



**Figure 4.8:** The Table Documentation panel (expanded).

To resize the panel, drag the divider bars. Hide or fully expand the panel by clicking the arrows on the divider bars, or by clicking the “Hide” button at the top-right corner.



**Figure 4.9:** Displaying information about a table column in the Table Documentation panel.

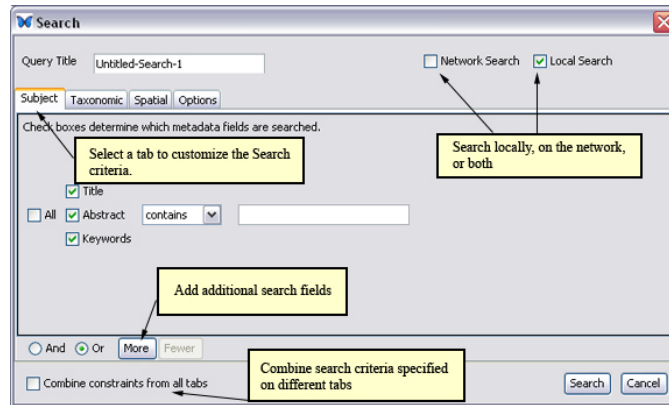


Figure 5.1: The Morpho Search interface.


## 5 Searching for Data Packages

Use Morpho searches to easily locate data packages (your packages and/or packages shared by other scientists) based on a variety of specified criteria. Packages can be searched by subject, taxonomic rank, and/or spatial extent. Combine these major search criteria to further refine result sets.

Note: If you are not logged in to the KNB network but have network access, the only network data packages that will appear in your search results are those that have "public" access privileges. To view additional data sets from the KNB network, log in to the KNB network from the [main Morpho screen](#).

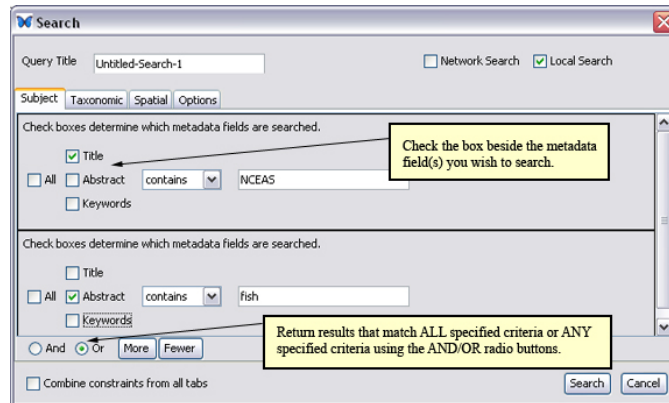
### 5.1 Opening the Search Interface and Performing a Search

To begin a search for data packages, do one of the following:

- click the search button  found on the Toolbar on the [main Morpho screen](#).
- click "Search for an existing data package" on the [main Morpho screen](#).
- select "Search" from the [Search menu](#).

The Morpho Search interface opens ([Figure 5.1](#)), where you can customize search criteria and specify the location of the files to search.

The four Search tabs ([Subject](#), [Taxonomic](#), [Spatial](#), [Options](#)) allow users to search for specific text, geographic extent, and taxonomic ranks and



**Figure 5.2:** The Subject tab settings of the Search interface.

values. We'll talk about each tab in more detail in the next few sections. Combine the criteria specified on all four tabs to constrain your search so that it returns only results that match all specified criteria. If the criteria are not combined, the search will return data packages that match any specified criteria. To combine criteria, check the "Combine constraints from all tabs" box at the lower left of the Search interface.

Check the appropriate boxes at the top right of the Search interface to specify the search location: only locally (i.e., on your computer), in the catalog (i.e., on the KNB network), or both. Click "Search" to perform the search at any time, or click "Cancel" to exit the Search interface.

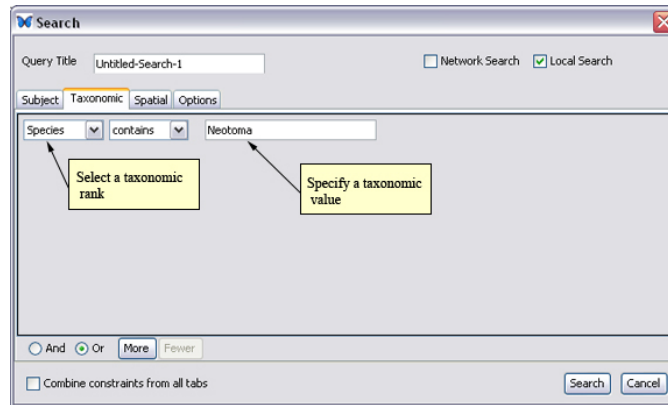
### 5.1.1 Subject search

Use the Subject tab (Figure 5.2) to search for specific text in the data package documentation. To specify subject criteria, type a search term in the space provided and select a metadata field or fields to search (Title, Abstract, or Keywords). Choose whether the field(s) contains, starts with, ends with, or equals the search term.

To add fields for additional search terms, click the "More" button (the "Fewer" button removes extra fields). Use the And/Or radio buttons to customize how results are returned. Choosing "And" returns only data packages that match EVERY ONE of the specified search terms. Choosing "Or" returns data packages that match ONE OR MORE of the specified terms.

In Figure 5.2, the "More" button has been used to create a second set of 'Subject' search criteria. The first set instructs Morpho to look for items





**Figure 5.3:** The Taxonomic tab of the Search interface.

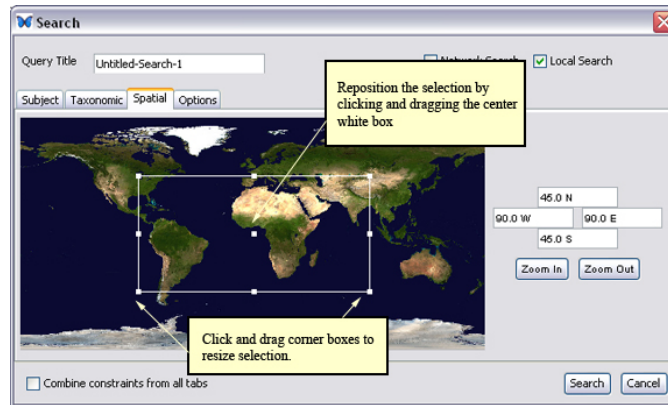
where the title starts with the phrase "NCEAS". The second set indicates that the abstract should contain the word "fish". These two search criteria are logically "OR"ed with the radio button near the bottom of the screen.

### 5.1.2 Taxonomic search

Use the Taxonomic tab (Figure 5.3) to search the taxonomic metadata for data packages associated with a specified taxonomic rank and value. Note that only taxonomic metadata fields are searched; taxonomic information specified in other metadata fields (e.g., keywords or title) is not considered by this search option. To specify taxonomic criteria, type a taxon rank in the space provided and select whether returned results contain, start with, end with, or equal that value. For example, you can search for the taxon rank "Species", and specify that the species name contains "Neotoma".

**NOTE** You can also include taxon synonyms from the Integrated Taxonomic Information System (ITIS) in the search using the setting under the [Options](#) tab.

To add fields for additional taxon ranks, click the "More" button (the "Fewer" button removes extra fields). Use the And/Or radio buttons to customize how results are returned. Choosing "And" returns data packages that match EVERY ONE of the specified search terms. Choosing "Or" returns data packages that match ONE OR MORE of the specified terms.



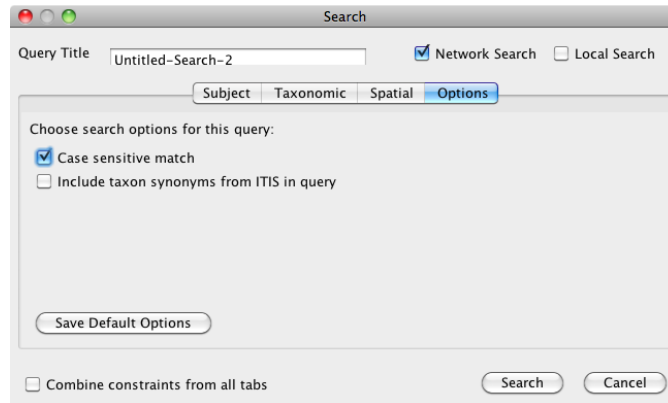
**Figure 5.4:** The Spatial tab of the Search interface.

### 5.1.3 Spatial search

The Spatial tab ([Figure 5.4](#)) allows you to search for data packages based on a specified geographic area. Morpho will return data packages that contain geographic latitude/longitude coordinates inside (and overlapping) the specified area.

To manually draw a "bounding box" like the one displayed in [Figure 5.4](#), click the map and then drag (with the mouse still pressed). Release the mouse when the selection is complete. Morpho will indicate the selection with a white rectangle and will note the latitude and longitude values in the text boxes to the right of the map. Use the white squares at the corners of the bounding box to resize it. To reposition the selection, click and drag the white square in the center. To draw a more precise bounding box, zoom into an area of the map using the "Zoom In" button. Return to the previous views using the "Zoom Out" button.

Coordinates of the bounding box can also be specified manually in the text fields on the right side of the panel. Beginning with the top text field and moving clockwise, these specify the north, east, south, and west edges of the bounding box. Coordinates can be specified as the number of degrees and the cardinal direction, as shown in [Figure 5.4](#). If the number of degrees is entered without a direction, positive numbers are treated as N or E, and negative numbers as S or W. By default, values are specified in fractional degrees. To enter degrees/minutes/seconds, type a space between each value.



**Figure 5.5:** The Options tab of the Search interface.

#### 5.1.4 Additional Options

The Options tab ([Figure 5.5](#)) allows you to specify whether the search should be case-sensitive (i.e., only data packages matching the search term exactly as it is specified will be returned). You can also choose to include taxon synonyms from the Integrated Taxonomic Information System (ITIS) in the search. These two options can be saved as default settings that will be applied to all future searches.

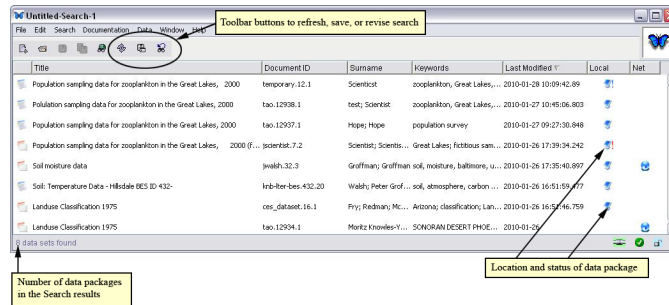
## 5.2 Viewing Search Results

Morpho displays the set of data packages that meets your search criteria in the Search Results screen ([Figure 5.6](#)). The interface indicates whether the packages consist of only metadata or metadata and data, as well as whether the packages are located on the local machine, the network, or both.

To open a data package and view it, do one of the following:

- double-click the package,
- right-click the package and select "Open" from the menu,
- select the desired data package, and then click the "Open" button in the Toolbar at the top of the window.



You can also open an earlier version of the data package (if any exist) by right-clicking and selecting "Open Previous Version." Note that one or more







**Figure 5.6:** Search results displayed in the Morpho interface.

previous versions of the data package may be unavailable, for example, a version saved only locally on a different computer.

The icons in the first column of the Open Data Package screen tell you if the package contains:

-  Data and documentation
-  Documentation only

Icons in the last two columns indicate the location and status of the package:

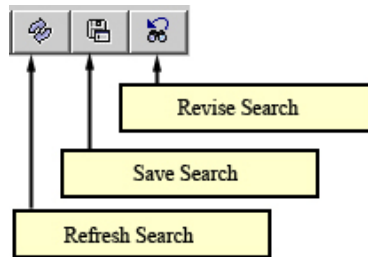
-  Local data package
-  Saved incomplete data package
-  Network data package
-  Recovered incomplete data package

For more information about saved and recovered incomplete data package, please see [section 6.3](#) and [section 6.4](#).

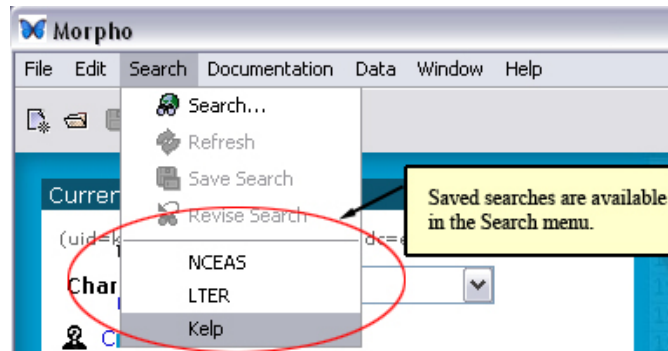
Use the Morpho Toolbar buttons to refresh the search, save the search for future use, or revise the search by changing the search parameters ([Figure 5.7](#)). These options are also available from the main Search menu located at the top of each screen.

### 5.3 Saving a Search

To save a search and its parameters for later use, specify a name for the search in the "Query Title" field, and then save the search by clicking the "Save search" button in the Toolbar, or by selecting "Save Search" from



**Figure 5.7:** Toolbar buttons for search results.



**Figure 5.8:** Access saved searches from the Search menu.

the Search menu. Saved searches are accessed directly from the Search menu (Figure 5.8).

**NOTE** You cannot delete a saved search via the Morpho interface. To remove a saved search, look in the `.morpho/profiles/<profilename>` directory and delete the "queries" subdirectory to remove all queries, or one of the files in the queries subdirectory to remove that search.

## 6 Creating a Data Package

When you create a data package in Morpho, you begin by entering data about the entire data set (e.g., title, abstract, and contact information). This summary information is the *minimum* amount of documentation necessary for creating a data package, and can be compiled using Morpho's [Data Package wizard](#).

Once the entire data set has been described using the Data Package wizard, you can begin adding information about the data objects themselves (i.e., information about the individual data tables, such as column names and measurement scales). Information about individual data objects is compiled using Morpho's [Data Table wizard](#).


After the data set has been fully documented, choose whether or not to include the data itself in the data package. Including the data and sharing it on the network allows you to take advantage of the KNB's replication features, which ensure that your data is secure.

### 6.1 Opening the New Data Package Wizard

The easiest way to start creating a data package is with Morpho's Data Package wizard, a handy and powerful tool for collecting general information that applies to an entire data set. General information includes: title and abstract, keywords, people and organizations, usage rights, research project information, spatial coverage information, methods and sampling information, and access information.

The Data Package wizard walks you through the process of creating metadata in a straightforward 15-step process. If you need to stop working during this process and would like to resume later, see the [Saving Incomplete Data Packages](#) section.

To open the wizard and begin creating a data package, do one of the following:

- click the New Data Package button  found on the in the [Toolbar](#)
- click “Create a New Data Package. . .” on the [main Morpho screen](#)
- select “New Data Package” from the [File menu](#)

The Data Package Wizard generates a data package based on the entered information.

Use the following key-board shortcuts to navigate through the wizard.

- left and right arrows take you forward and back through the wizard steps. Note that if the cursor is in a text field, left and right arrows move the cursor left and right inside that field.
- “Esc” exits the wizard
- “Tab” moves from one field to the next. Note that for some text-entry fields (e.g., abstract), the Tab key inserts a tab.
- “Enter” skips to the next step in the wizard

## 6.2 Adding Metadata to the Package

The Data Package wizard ([Figure 6.1](#)) helps you gather the minimum amount of documentation necessary for creating a data package:

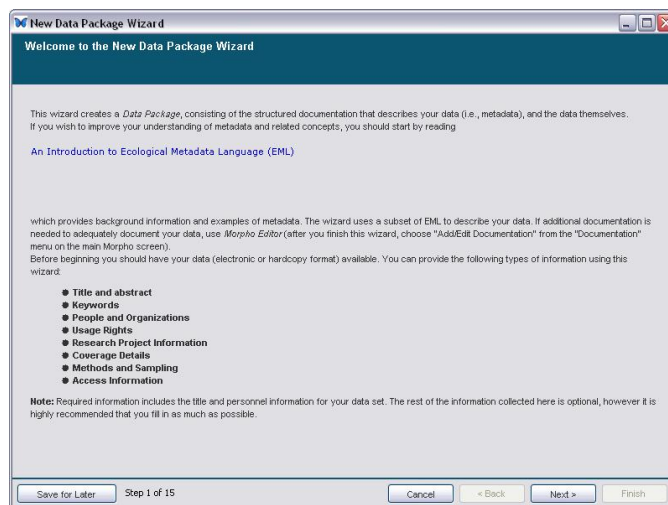
- [Title and Abstract](#)
- [Keywords](#)
- [People and Organizations](#)
- [Research Project Information](#)
- [Usage Rights](#)
- [Coverage Details](#) (geographic, temporal, taxonomic)
- [Methods and Sampling](#)
- [Access Information](#)
- [Summary](#)

Required fields are identified with red labels. You must fill out all required fields before proceeding to the next step. Remember, you can always change the documentation at a later time using items in the [Documentation menu](#).

The wizard displays instructions for filling out each screen. We recommend that you read the explanatory text before filling out the wizard forms.

### 6.2.1 Title and Abstract

The second step of the Data Package Wizard ([Figure 6.2](#)) collects a data set title (required) and abstract. The title provides a full description of the package, and should be detailed enough to differentiate the package from



**Figure 6.1:** The first screen (Step 1) of Morpho's Data Package Wizard.

other similar data packages. The abstract consists of a paragraph or more describing the data. Although the abstract is optional, it is very useful, and we highly recommended that you include an abstract with your package documentation.

Type the title and abstract directly into the fields, or create them elsewhere and paste them into the appropriate spots. Use the keyboard shortcuts “control+C” for copy and “control+V” for paste. We strongly recommend that documents use only ASCII characters. Special characters can create problems when cut and pasted into Morpho.

### 6.2.2 Keywords

Keywords – significant words or phrases that help identify the data set – are specified in Step 3 of the Data Package wizard (Figure 6.3) By entering keywords, you enable your data packages to be easily searched and categorized. If you wish, you can use keywords from a predefined list (such as the [NBII Biocomplexity Thesaurus](#) or [KNBRegistry thesaurus](#), which allows data managers to select an organizational affiliation for a given data set) that associates an authoritative definition with the terms.

To add a new set of keywords, click “Add” to open the “Define Keyword Set” screen (Figure 6.4). Click the “Add” button on the Define Keyword Set screen to add a keyword to the list. To delete a keyword, select it and click “Delete.” Use the “Move Up” and “Move Down” buttons to alter the order



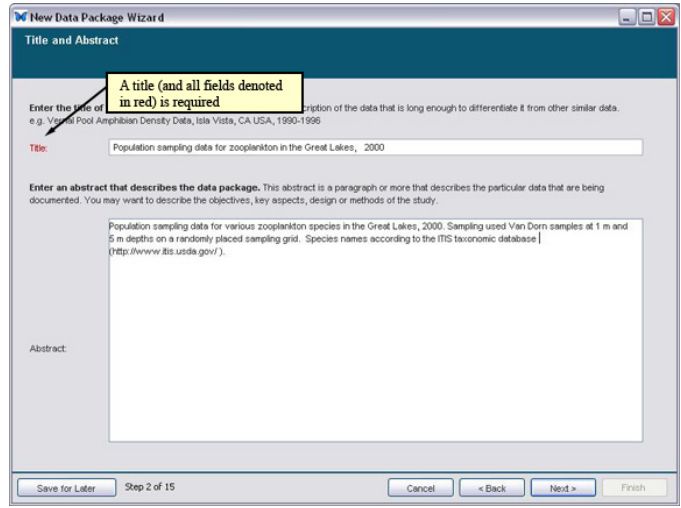


Figure 6.2: Step 2 of the Data Package Wizard. Add a title (required) and abstract.

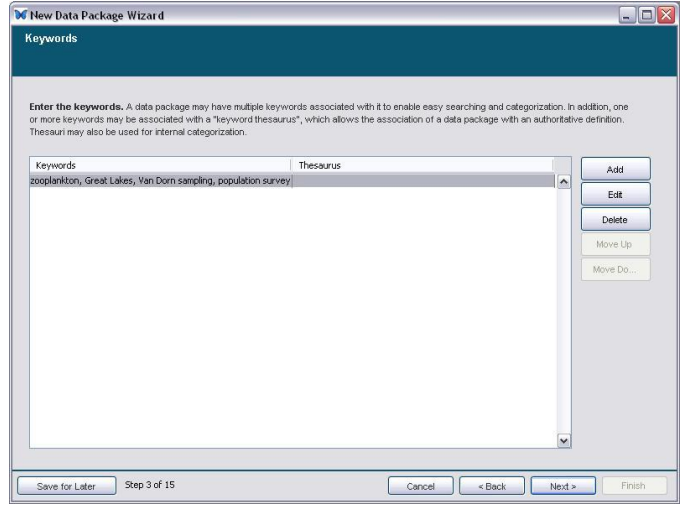
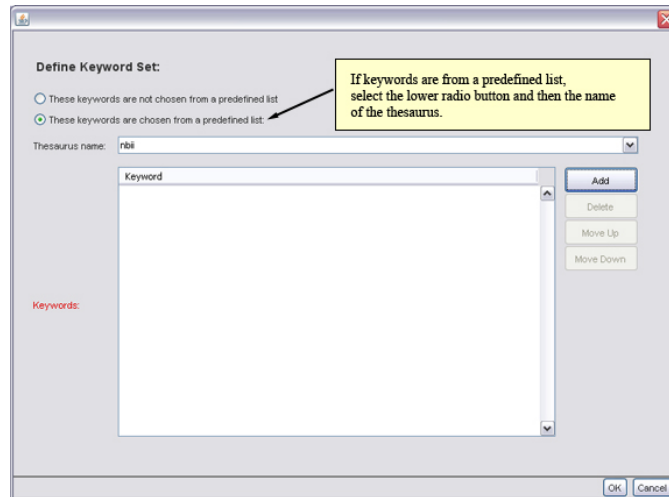


Figure 6.3: Step 3 of the Data Package wizard displaying example keywords.



**Figure 6.4:** Define a keyword set. If the keywords are from a predefined list such as a thesaurus, select the lower radio button and the name of the thesaurus.

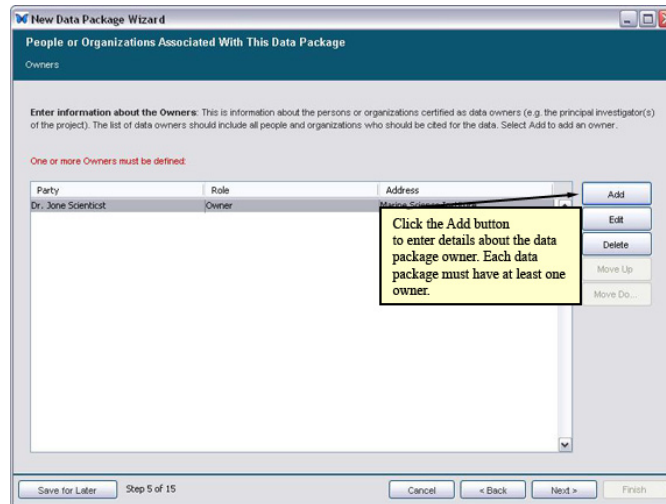
of the keywords. If the keywords are selected from a predefined list, click the radio button beside “These keywords are chosen from a predefined list” and select the name of the thesaurus (**NBII Biocomplexity Thesaurus** or **KNBRegistry thesaurus**) from the drop-down menu.

The KNBRegistry thesaurus is only relevant to NCEAS, SAEON and SANParks data managers, and allows these data managers to select an organizational affiliation for a given data set. In the case of the SAEON and SANParks, the thesaurus is used to filter search results for different locations throughout the park network. The NCEAS entry is also instrumental for documenting data packages that come from various working groups hosted by the center.

Click “OK” when you are done adding keywords. The new keywords will populate the wizard’s Step 3 screen (as they appear in [Figure 6.3](#)). To add another, entirely separate list of keywords – perhaps for keywords specific to the project – click “Add” and enter a new list of keywords on the Define Keyword Set screen. Click Next to proceed to Step 4.

### 6.2.3 People and Organizations

Steps 4 through 7 of the Data Package Wizard help users document the people and organizations responsible for creating the data set, as well as



**Figure 6.5:** Step 5 of the Data Package Wizard: Click the Add button to enter details about the data package owner(s).

whom to contact with questions regarding the use or interpretation of the data. There are three types of people to document:

**Owner** (*required*) The person(s) or organization(s) credited with creating the data (e.g., a principle investigator)

**Contact** (*required*) The person(s) or organization(s) to contact with questions about use or interpretation of the data. The contact may be the same as the owner.

**Associated parties** (*optional*) People or organizations functionally associated with the data. For example, the person who maintains the database is an associated party with the role of 'custodian'.

Step 4 simply displays a reminder about what information will be collected in the following three steps. In Step 5 (Figure 6.5), enter information about the data package owner. Click the Add button to start entering details about each owner.

Enter details about the data set owner in the Owner Details screen (Figure 6.6) or populate the form fields with existing contact information by using the drop-down menu at the top of the screen. The drop-down menu includes a list of previously entered data package owners. Select an existing owner to populate the form with the owner details. Check the "Do you want to edit the above information" check box, and select "Copy original and

**Figure 6.6:** Adding details about the data package owner. Note that either the owner’s last name, organization, or position name is required.

edit” to create a new set of details based on the existing details. In addition, the drop-down menu contains an option for viewing a list of all of your existing data packages and their owners. Select that option to populate the form fields with information entered in another data package.

Note: Only one of the three required fields (Last Name, Organization, or Position Name) must be filled.

After entering owner details, click OK. The wizard displays the entered information on the summary screen. Add additional owners, delete listed owners, edit owner details, or change the order in which the owners are listed with the buttons on the right of the screen.

Click Next to move to Step 6, adding contacts. Adding contacts is very similar to adding owners. Note that the contact may be the same as the owner, in which case, you can choose the appropriate person or organization from the drop-down list at the top of the Contact Details screen. Otherwise, enter the Contact’s information in the form provided.

Step 7, adding Associated Parties, is also similar to adding contacts and owners. In addition to the details provided in the previous two steps, you must select a ‘Role’ from the drop-down list on the Associated Party Details screen (or type in a role that you’d like to use) (Figure 6.7).

**Figure 6.7:** Adding Associated Party Details (Step 7 of the Data Package Wizard)

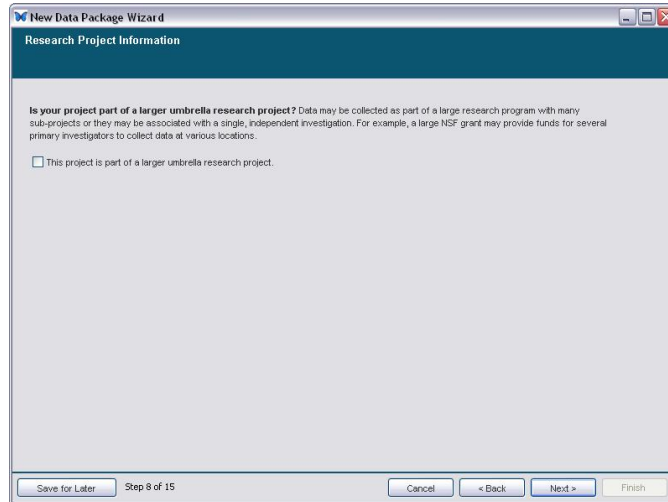
## 6.2.4 Research Project Information

Data may be associated with a single, independent investigation, or they may be collected as part of a research program with many sub-projects (a large NSF grant may provide funds for several investigators to collect data at various locations, for example). If your data is part of a larger research project, indicate this by marking the checkbox in Step 8, Research Project Information (Figure 6.8). You will be prompted to enter the name of the larger project, its funding source, and one or more associated people or organizations.

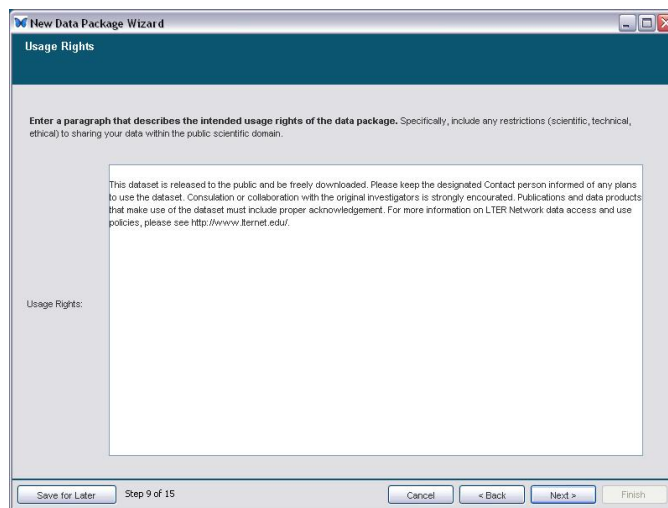
## 6.2.5 Usage Rights

Specify the intended usage rights and restrictions (scientific, technical, ethical) for sharing your data within the public domain (Figure 6.9) in Step 9 of the wizard. You may request that users inform the Contact person if they wish to use the data package, for example, or that they read use and access policies that are posted on a website.

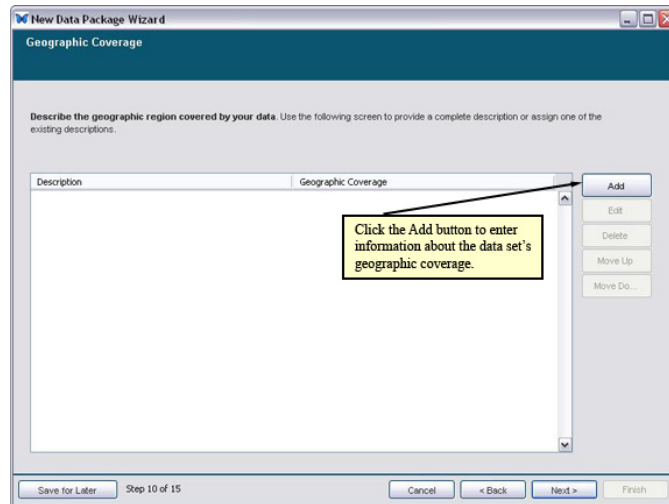
Click “Next” to move on to Step 10, Coverage Details.



**Figure 6.8:** Step 8 of the Data Package Wizard.



**Figure 6.9:** Enter the usage rights and restrictions (or copy and paste them) into the field provided.



**Figure 6.10:** Enter information about the data set's geographic coverage.

### 6.2.6 Coverage Details (geographic, temporal, taxonomic)

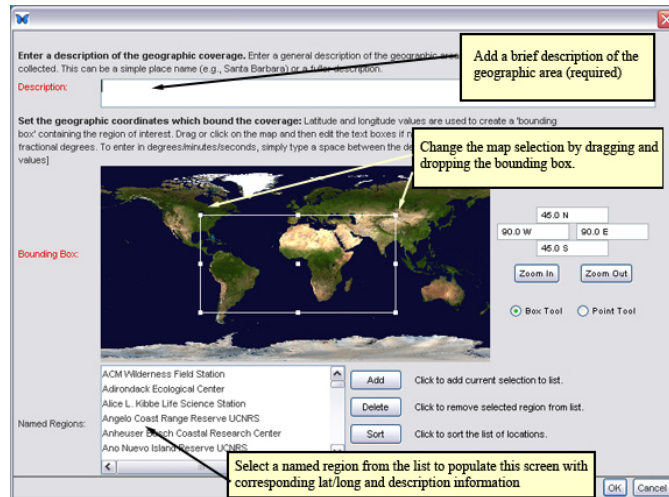
Adding information about the data set's geographic, temporal, and taxonomic coverage allows users to easily search for data sets by these criteria. Whether you are documenting the latitude and longitude coordinates of your study, or specifying the date range over which data were collected, the wizard's interface simplifies the process by providing a handy set of data entry tools.

Click the "Add" button in Step 10 of the Data Package Wizard ([Figure 6.10](#)), to begin entering information about the geographic coverage of the data. Coverage can be a single point (a reserve or park, for example) or a region.

After you click the Add button, the Geographic Coverage details screen opens ([Figure 6.11](#)).

A textual description of the spatial coverage is required. In addition, you must specify coverage coordinates. To select a geographic region, use one of the following methods:

- Select the "Box Tool" radio button. Drag the mouse on the map to create a selection. Drag the white squares on the edge of the box to adjust the edges.
- Select a point on the map by selecting the "Point Tool" radio button and clicking the map.



**Figure 6.11:** Customizing geographic coverage details (step 10 of the Data Package wizard).

- Manually enter latitude and longitude coordinates in the text boxes provided.
- Select a predefined region or point by selecting a location from the named region menu at the bottom of the screen. To add a new named region to the list, select the region or point on the map, optionally enter a description, and click “Add”. To remove a named region from the list, select the region and click “Delete”. You can also “Sort” the items in the list.

Click “Zoom In” or “Zoom Out” to change the view of the map.

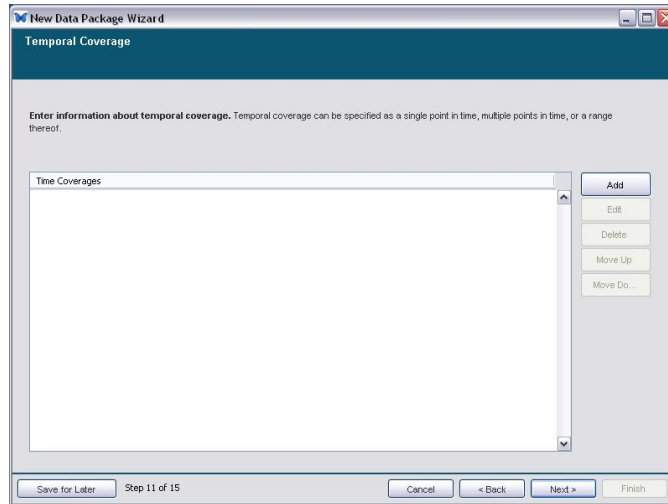
The latitude and longitude coordinates for the selected area or point will be displayed on the right of the screen. By default, values are specified in fractional degrees. To enter degrees/minutes/seconds, type a space between each value.

Click OK to return to the main Geographic Coverage screen. From here, you can choose to add additional geographic coverage documentation, or edit, delete, or change the order of the geographic descriptions you have entered. Click Next to proceed to Step 11, Temporal Coverage (Figure 6.12).

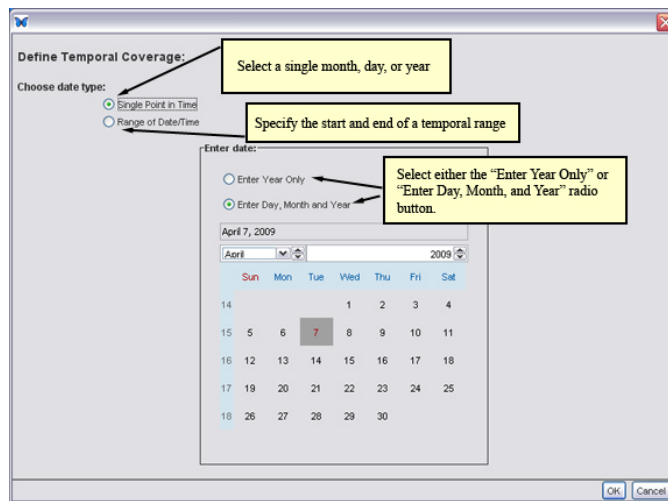
Click the Add button to open the Define Temporal Coverage screen (Figure 6.13).

Choose the date type using the radio buttons at the top of the screen:

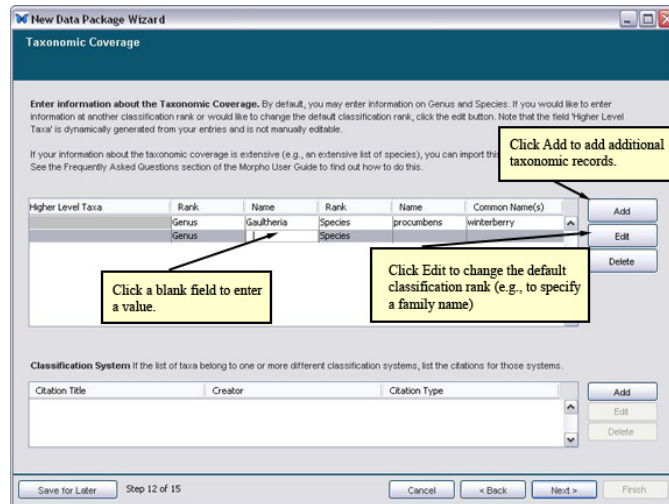




**Figure 6.12:** Specify the data set's temporal coverage.



**Figure 6.13:** Specify temporal coverage details (Step 11 of the Data Package wizard).



**Figure 6.14:** Specify taxonomic coverage.

- Select “Single Point in Time” to specify a temporal coverage of a single year or single day.
- Select “Range of Date/Time” to specify a start and end date. When you select the range radio button, a second calendar will appear for collecting end-date information.

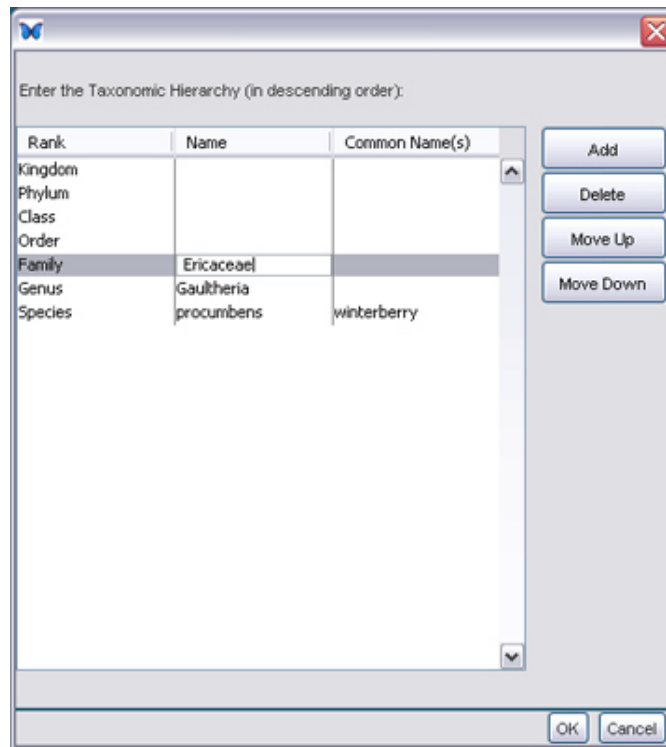
Select one of the radio button above the calendar to specify only a year (the default), or a month, year, and day. Select a month and year from the drop-down menus above the calendars. To select a day, click that day in the calendar.

Click OK to return to the main Temporal Coverage screen. Click Next to proceed to Step 12, Taxonomic Coverage ([Figure 6.14](#)).

The Taxonomic Coverage interface allows you to easily add taxonomic coverage information for a short list of species (or other taxonomic ranks). If your data set has a large taxonomic coverage, you will likely wish to import the data instead of entering it here. This process is described later in this section.

To add taxonomic coverage for one or two taxon ranks (such as genus and species, displayed by default), click a blank field beside the rank and type the corresponding name. Species common name(s) can also be specified by clicking and typing in the provided field.

To add additional levels of taxonomic information, select a row of information and click the “Edit” button to open the Taxonomic Hierarchy screen



**Figure 6.15:** Entering the taxonomic hierarchy (for more than two levels).

(Figure 6.15).

If your taxonomic coverage is extensive, you may wish to import the information instead of entering it into the wizard. If you chose to import the taxonomic coverage information, skip Step 12 of the wizard and complete the remaining wizard steps. You will then need to import the taxonomic information as a data table and use the “Import Taxon Information from Data Table” option from the Documentation > Taxonomic Coverage menu item to import the list into the appropriate place.

To import taxonomic coverage information:

1. Save your taxonomic coverage information (e.g., a list of species) as a text file.
2. Open the data package that is associated with the taxonomic information.
3. Select “Create/Import New Data table” from the Data menu. Click

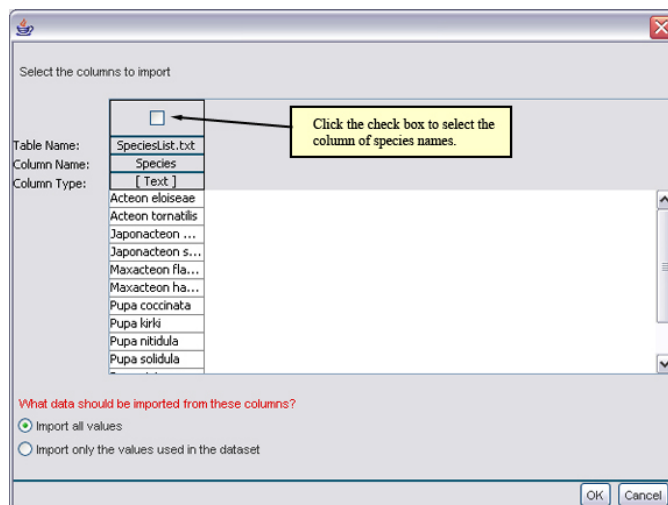
“IMPORT” and “AUTOMATIC”, and locate your species text file on your computer. The wizard will display the file.

4. Complete the [Data Table Wizard](#). You may need to uncheck the space-delimiter box in Step 2 of the wizard to display species names in a single column.
5. From the Documentation menu, select Taxonomic Coverage. Click “Import Taxon Information from Data table.” The import screen opens ([Figure 6.16](#))
6. Select the column(s) corresponding to your taxonomic information by checking the box at the top of the column. Note that Morpho expects species names to be binomials (e.g., *Ursus arctos*), and so the import utility expects to find the binomial in one of the imported columns, as shown in [Figure 6.16](#).
7. A pop up box prompts you to select the taxon rank that corresponds to the values in the column. Choose the taxon rank and click “OK”.
8. Choose to import all of the values in the selected column(s), or only certain values using the radio buttons at the bottom of the import screen. The two options only apply when the imported taxon names are documented as having enumerated values. If this is the case, the “Import all values” option imports each of the predefined codes listed as possible enumerated values (not the column values; any taxon value in the column that does not have an associated code in the metadata, will not be imported). “Import only values used in the dataset” imports each unique value in the column of data, completely ignoring the codes provided in the metadata. Note that because of the way Morpho displays enumerated values (with one column containing codes and another their definitions), you will not see the column values. If the imported column contains free-form text values, both options simply pull in the values used in the dataset.
9. Click Import.

Your taxonomic information will appear in the Taxonomic Coverage screen.

### **6.2.7 Methods and Sampling**

Method and sampling information describes the steps followed in implementing an experiment and the experiment’s sampling design (e.g., the



**Figure 6.16:** Importing taxonomic coverage information from a text file.

way in which treatments were assigned to sampling units). Although this information is not required, it helps other users understand your data and how it was assembled. Both method and sampling information is entered in Step 13 of the Data Package Wizard (Figure 6.17).

To add a method description, click “Add” to open the Step Information screen (Figure 6.18).

Enter a method title (optional), description (required), and instrumentation details (optional), then click “OK” to return to the main Methods and Sampling screen.

Study extent information supplements the information already provided in the temporal or spatial extent of the study. For example, missing years for temporal coverage should be noted here, or a description of temporal coverage for data sets beyond the calendar range provided previously (such as “the pleistocene”).

Use the sampling description field to provide details on the sampling design of the study.

When you have finished entering method and sampling information, click “Next” to continue to Step 14 of the wizard, Access Information.

### 6.2.8 Access Information

By setting access information, you control who has access to your data and metadata (Figure 6.19). For example, you can specify that the public can

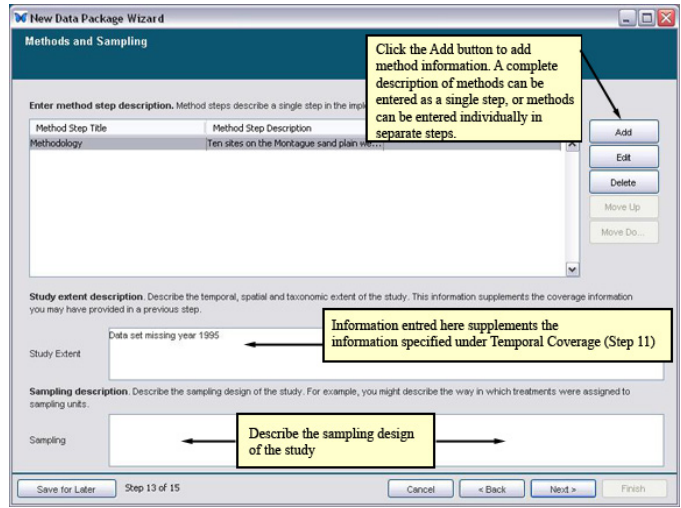


Figure 6.17: Adding information about methods and sampling.

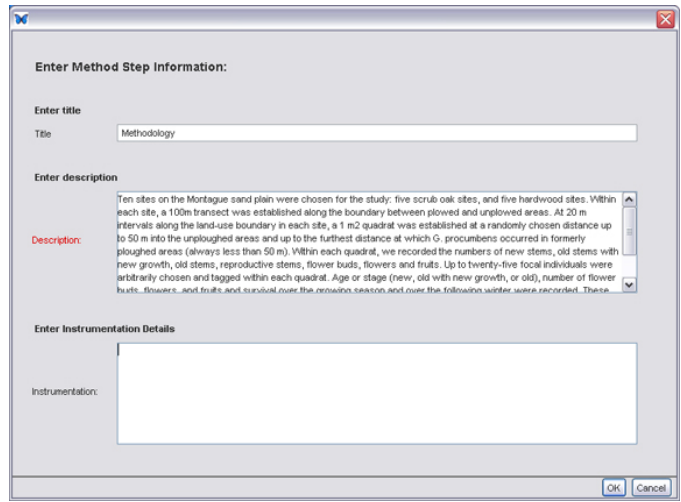
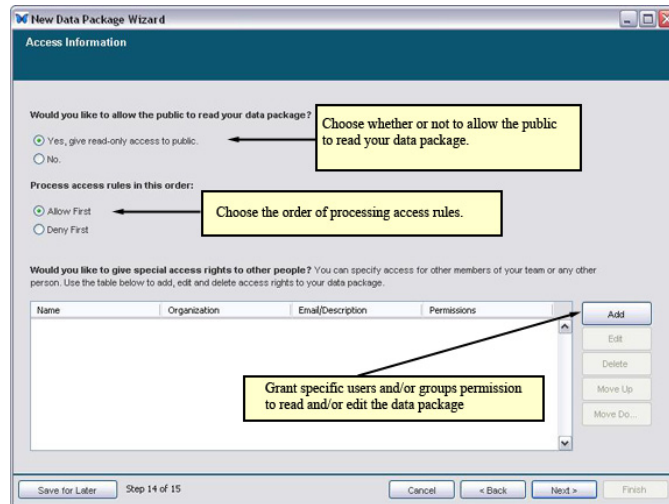


Figure 6.18: Entering methodology information.



**Figure 6.19:** Set access permissions for the entire data package.

view your data, or that only specified colleagues can do so. You can also grant specific users and groups permission to edit your data files, and/or to grant read/edit permission to additional users.

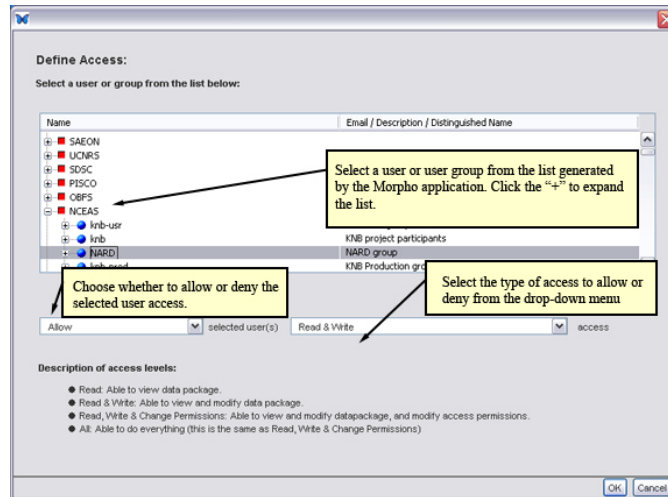
By default, the settings specified in the wizard apply to all metadata and data tables imported into the package. However, after you have added one or more data tables to the package, you can choose to set different permissions for each table using the “Edit Data Table Access” option in the Data menu. For example, the data package may permit public read access, but read access to the data table can be more restrictive (e.g., only granted to a specified user group).

Select a radio button from the top of the Access Information screen to indicate whether or not the public can read your data package once it is [placed on a network](#).

Click Add to open the Define Access screen ([Figure 6.20](#)) and grant specific users and groups customized access to the data package.

After selecting a specific user or user group, define the appropriate access permissions using the drop-down menus. Choose Allow or Deny, and then the access level:

- Read (able to view the data package)
- Read and Write (able to view and modify the data package)
- Read and Write and Change Permissions (able to view and modify the data package and modify access permissions)



**Figure 6.20:** Select users or user groups and assign appropriate access levels.

- All (same as Read and Write and Change Permissions)

Once you have defined the appropriate access level, click Next to continue to Step 15, the Summary.

### 6.2.9 Summary

Step 15 of the Data Package Wizard ([Figure 6.21](#)) confirms that you have entered the required documentation. Your data package will be created when you click Finish. Note that you must save the package, or the entered information will be lost. See section 7 for step-by-step instructions for adding data tables to your packages.

Click Finish to view the data package documentation ([Figure 6.22](#)), or click the “or click here to finish this wizard and add a new data table now” link to add a data table to the package immediately.

If you have not already saved your package (File > Save), Morpho will prompt you to save the package before you close it. You can choose to save the package locally and/or to the network. To edit the data package documentation, use the options in the [Documentation menu](#). For more information about editing package documentation, see [Editing a Data Package](#).



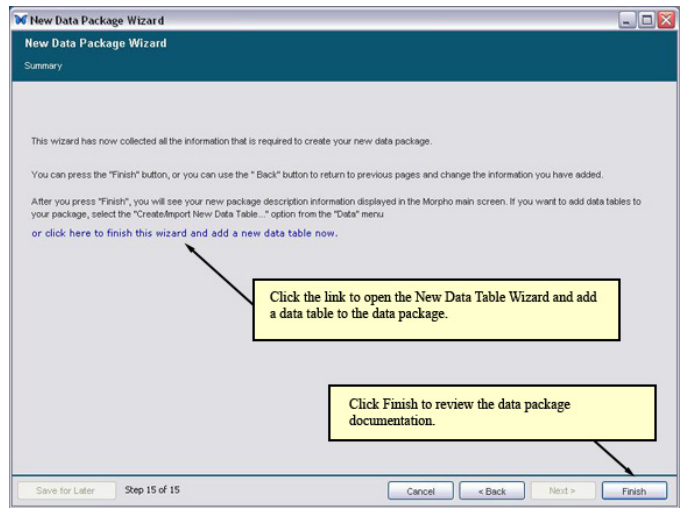


Figure 6.21: The Summary screen.

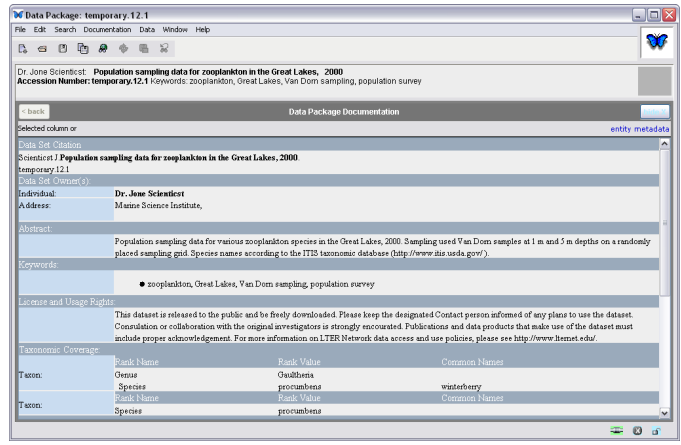
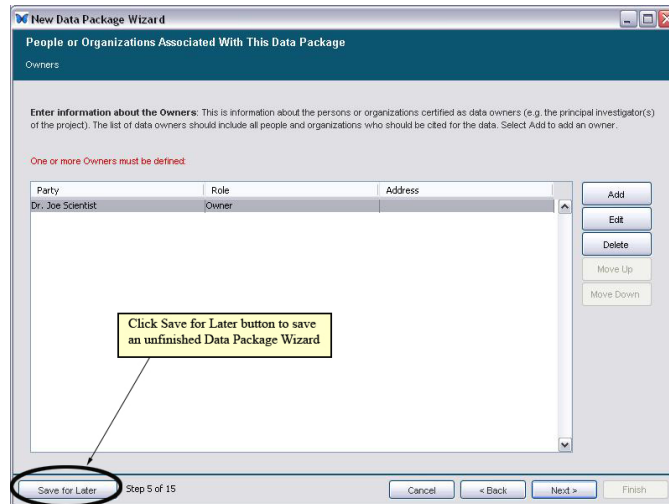


Figure 6.22: Data package documentation is displayed by Morpho after the user clicks the Finish button.



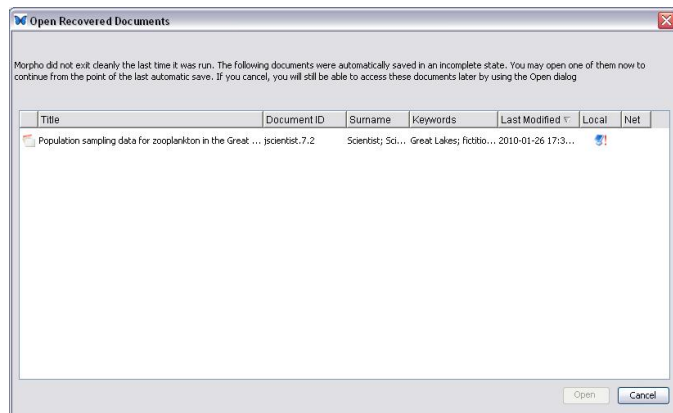
**Figure 6.23:** Save an incomplete data package.

### 6.3 Saving Incomplete Data Packages

You can save an incomplete data packages during the New Package Wizard. Click the “Save for Later” button at any step and the incomplete data package will be saved locally (Figure 6.23). The incomplete data package can be opened like any other data package from the open menu option. After opening the incomplete data package, Morpho will start the wizard at the last save point. When the wizard is finished, a complete data package is saved.

### 6.4 Recovering Incomplete Data Packages

Morpho can recover previously entered metadata if the New Data Package Wizard fails before saving a complete data package. The next time Morpho is launched, a window (Figure 6.24) will show any incomplete data packages that result from a failed wizard. The recovered data packages can be opened and completed at this point. Choosing “Cancel” still allows the wizard to be completed later by opening the data package from Morphos Open dialog.



**Figure 6.24:** Display the recovered data packages.

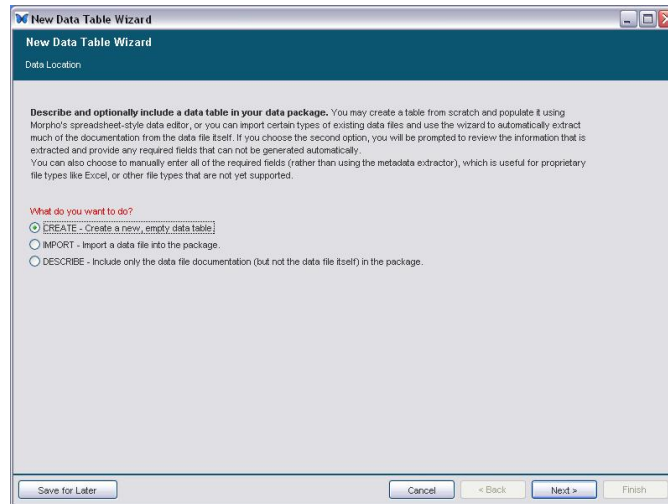


Figure 7.1: The Data Table Wizard.

## 7 Adding Data to the Data Package

In [section 6](#) of the User Guide, we stepped through the process of creating a data package – an entity that can contain data objects and/or data object documentation. Data objects are most commonly tables (delimited text files arranged in rows and columns) though Morpho also supports documenting several image formats as well as data saved in propriety formats such as Excel. Data documentation describes the data object – the columns and rows, the units used, etc. In this section we will look at how to add data and data documentation to a package using the Data Table wizard.

### 7.1 Opening the Data Table Wizard

The Data Table wizard ([Figure 7.1](#)) helps users add data and data documentation to a data package. The wizard steps through the process of importing data (or manually creating it) and adding the proper documentation. Note that you must complete the wizard. If you exit before finishing, you will lose your changes.

Users can choose to import an existing data table and (optionally) extract metadata from it, or to document a data table without including the data set itself in the package.

Fields labeled in red are required, and you cannot proceed to the next step without first specifying the required values.

To open the wizard and begin documenting a data table, do one of the following:

- From the [Summary](#) screen of the Data Package wizard (Step 15), click the “or click here to finish this wizard and add a new data table now. . .” link.
- Open a data package and select “Create/Import New Data Table. . .” from the [Data menu](#) at the top of the Data Package screen.

On the first screen of the wizard, you must choose whether to [Create](#), [Import](#), or [Describe](#) the data object:

### 7.1.1 Create

Document and then create a data table from scratch, populating it using Morpho’s spreadsheet-style data editor.

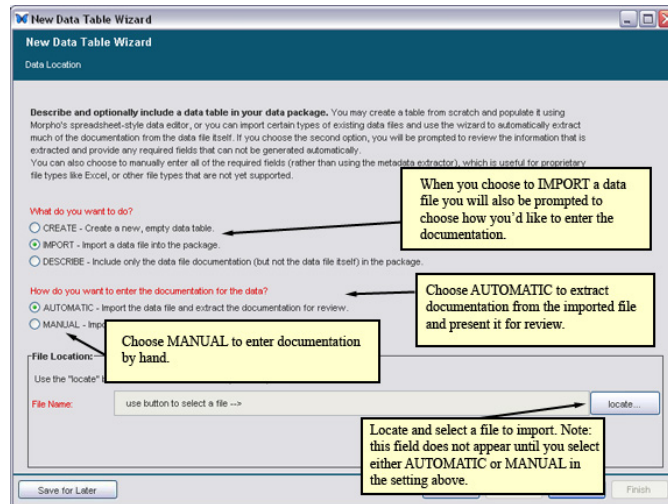
If your data table does not yet exist, you may wish to create both the documentation and data table using Morpho. The Data Table wizard leads you through the required steps. See sections [7.2-7.3](#) for complete instructions.

### 7.1.2 Import

Import a data table and (optionally) automatically extract documentation from the data table to use in the metadata.

When you choose to import a data file, Morpho will (with your help) locate the file on your computer, guide you through the documentation process, and include the file as part of the data package ([Figure 7.2](#)). If your data set exists as (or can be easily translated into) a delimited text file, you can instruct Morpho to automatically extract certain documentation from the data file (in which case, Morpho will extract table headers and other information contained in the table and pre-populate the corresponding wizard fields with information). When you import a delimited text file, Morpho can also populate the wizard’s spreadsheet editor with the existing data fields.

If you choose to manually enter documentation, the Data Table wizard will take you through the steps outlined in [section 7.2](#) and [section 7.3](#). If you choose to automatically extract and import documentation, the Data Table wizard first displays your data table for review. We look at the process of importing documentation more closely in the [Importing Documentation](#) section.



**Figure 7.2:** Importing data files with the Data Table wizard.

### 7.1.3 Describe

Document the data, but do not include the data in the data package.

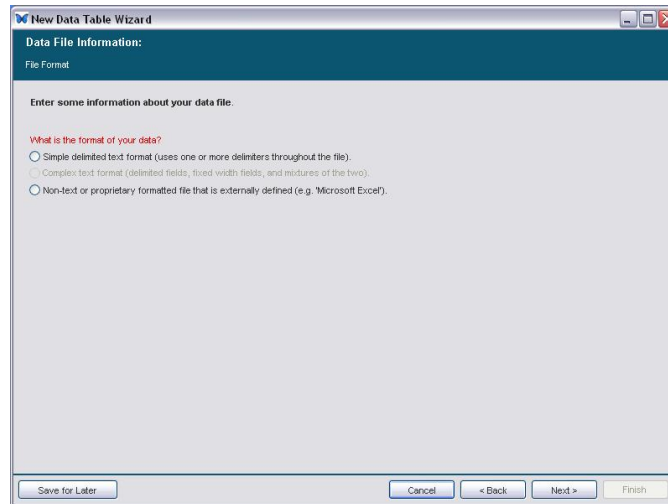
If you choose to describe your data, the Data Table wizard will step you through the process of providing documentation for it. Describing data is useful for documenting the data for yourself, as well as for telling others about the data (if the data package is saved to a network) without sharing the data set itself (Note that you can also control access to the data table by [setting access restrictions](#) for it). You might also choose this option if the data are not available in digital form, or if the data are available at an online URL.

## 7.2 Documenting the Data Table

The first few screens of the Data Table wizard collect [Data File Information](#), [Data Table Information](#), and [Data Attribute Information](#).

### 7.2.1 Data File Information

Once you have selected how you would like to add a data table to the package (by creating, importing, or describing it), the Data Table wizard requests information about the format of the data file ([Figure 7.3](#)).



**Figure 7.3:** The Data Table wizard: specifying file format information.

The instructions in this section are for working with tabular data (e.g., simple delimited text). For more information about working with non-text or proprietary formatted files, see [Adding Other Data Table Types](#).

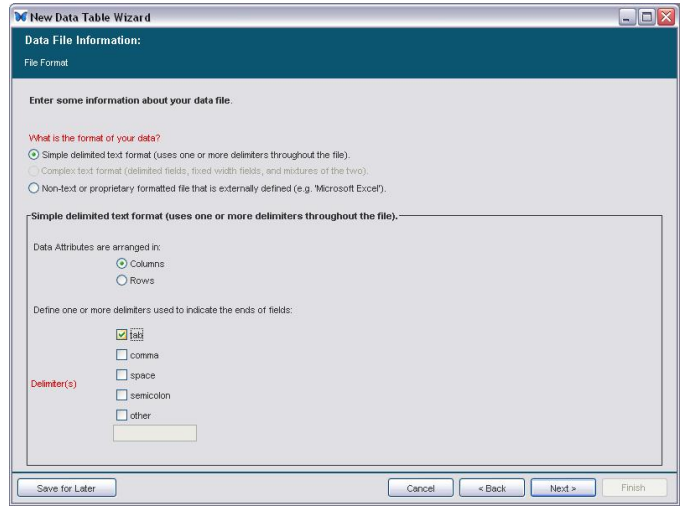
After selecting a data file format, the Data Table wizard requests additional details about that format ([Figure 7.4](#))

A delimiter – the character used to indicate the separation of each data field in your table – is required. Often, the delimiter is a comma. If you are importing a data file and do not know what delimiter it uses, open the file and check to see how the table values are separated. You should also specify whether attributes are arranged in columns (i.e., the headers run across the top of the table) or rows (the headers run down the left side of the table).

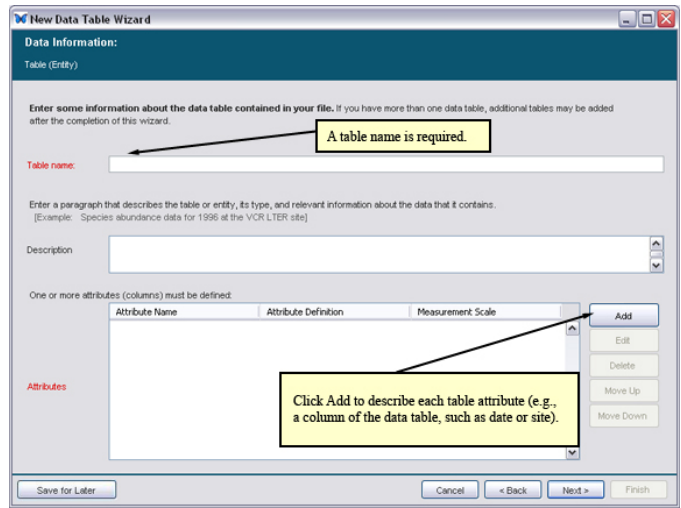
### 7.2.2 Data Table Information

Data packages may contain any number of data tables. In order to clearly identify each, the Data Table wizard prompts you to specify a table name, description, and attribute documentation ([Figure 7.5](#)).

A table name is required, as well as at least one attribute definition (we recommend that you document all attributes). The table name is used to identify the table, and should be short but still uniquely identify the table. An attribute is usually a column of the data table, such as date or site. For example, a definition for a site attribute would clarify what the values mean



**Figure 7.4:** Adding details about the data format in the Data Table wizard.



**Figure 7.5:** Adding data table information with the Data Table wizard.



**Figure 7.6:** Define table attributes. We look at each of these fields in more detail in the following section.

(e.g., “1 of 5 sites around Lake Erie”). Though a table description is not required, we recommend that you briefly describe the table and provide information about the data it contains (e.g., “Species abundance data for 1996 at the VCR LTER site”) to document the overall meaning of the table.

Click the Add button to open the Define Attribute screen and begin documenting the table attributes (Figure 7.6). We will look at this screen in more detail in the next section.

### 7.2.3 Data Attribute Information

Specifying data attribute information helps you and other people using your data interpret the data accurately. For example, if a column of data is titled “spden” – a term that might be familiar to your research team, but not other scientists who may later join it (or view your data on the network) – you can clarify the meaning when you define the table attributes. For each attribute (i.e., column of data), you have an opportunity to document the name as it appears in the data table, a label that may more clearly reflect the value, a definition that further elucidates the meaning of the value, storage information, and category information. Category information, which documents the attribute’s measurement scale, is required.

- [Name, Label, and Definition](#)

The screenshot shows a dialog box titled "Define Attribute or Column:". It contains four input fields with labels and descriptions:

- Name:** Q1A. Description: Name of the attribute as it appears in the data file.
- Label:** Habitat Plan. Description: A more readable label for the attribute.
- Definition:** Name, Permit Number, County and State of Habitat Conservation Plan. Description: Define the contents of the attribute (or column) precisely, so that a data user could interpret the attribute accurately. e.g. "spden" is the number of individuals of all macro invertebrate species found in the plot.
- Storage:** (empty). Description: Storage type for this field e.g. integer, float.

**Figure 7.7:** Example values for the Name, Label, and Definition fields. In this example, the data column in the data file is titled Q1A. The Label and Definition fields clarify the value.

- [Name, Label, and Definition](#)
- [Name, Label, and Definition \(Unordered \(nominal\), Ordered \(ordinal\), Relative \(interval\), Absolute \(ratio\), Date-Time\)](#)

Although the Data Table wizard requires that you document only one table attribute, we strongly recommend that you document all table attributes.

### Name, Label, and Definition

The Name, Label, and Definition fields identify the name and contents of the data column ([Figure 7.7](#)). The Name field is required. If you are importing a data table that contains a header row, the value should match the headers used in the data file. Morpho will detect the headers if you chose to extract metadata automatically, otherwise you will have to enter the names manually. If you are creating a data table, the name value will be used to identify the data column. The Label field is optional, but we recommend that you specify a more readable column name if the original name is difficult to interpret. The Definition, which is also required, further clarifies the meaning of the data column. The Definition is probably the most important part of defining the attribute because it provides information that helps future data users understand what the attribute means or represents.

### Storage and Storage System

The Storage and Storage System fields help identify the structural type of the column values. Though not required, specifying this information helps data users know how your data are stored. Some common types include string, Boolean, integer, float, long, double, matrix, object, scalar, and array. How each structural type is defined depends on the system used (Java, Oracle, etc).

## Category

Categories describe how the data are measured, what measurement scale they use (Table 2), and how values are enumerated and defined on that scale. Selecting the proper measurement scale is critical because the scale determines the types of statistics you can use to analyze your data. The measurement scale also dictates the type of metadata needed to describe your data set (for example, categorical data never have a “unit” of measurement). When you select a category, the Data Table wizard automatically prompts you to enter only the relevant information.

The categories used in the Data Table wizard are based on Steven’s original typology (Stevens, SS (1946). On the theory of scales of measurement. *Science*, 103(2684):677), with the addition of “Date-Time” for purely pragmatic reasons (we need to distinguish date-time values in order to collect certain essential metadata about date and time representation). In this section, we will look more closely at each measurement scale and when it should be used. It is important to keep in mind that a given type of data may fall under more than one measurement scale (for example, values using an ordered scale such as “strongly agree, agree, disagree”, also represent categories that can be described by an unordered scale). This is because each measurement scale is a superset of the one beneath it in Table 7.1 (i.e., ordinal data are also nominal, interval data are also ordinal and nominal, and ratio data are also interval, ordinal, and nominal). When selecting a category, select the most restrictive category (i.e., closer to the bottom of the table) that still accurately describes the attribute’s data.

After you have chosen a category, the Data Table wizard prompts you to describe the units, number types, and other details about the categories themselves.

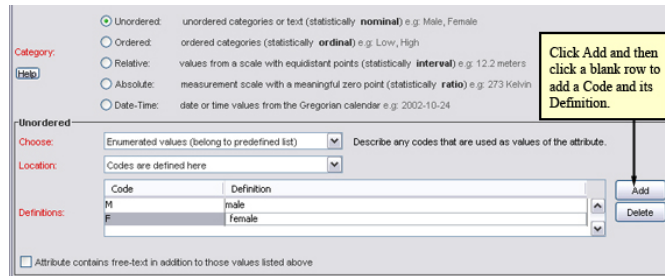
**Unordered (nominal)** The unordered, or nominal, scale places values into named categories. The different values within a set are unordered. Some examples of unordered scales include gender (Male/Female) and marital status (single/married/divorced). Text fields (e.g., names of study sites or U.S. telephone numbers) should be classified as nominal.

When “Unordered” is chosen, the Data Table wizard prompts you to choose whether the values are “enumerated values belonging to a predefined list” (e.g., single/married/divorced), or if they are “text values.” Text values can be free-form or can match a pattern that is specified in the wizard as well.

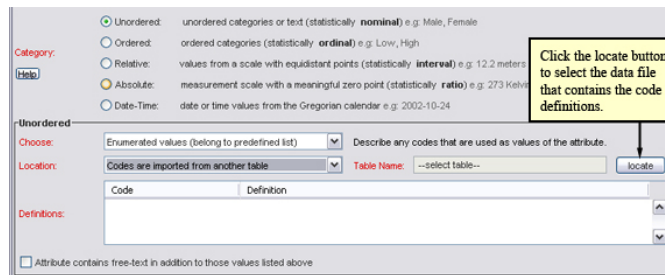
If you choose “Enumerated values,” you will be required to define the

<b>Category</b>	<b>Description</b>
Unordered (nominal)	The unordered, or nominal, scale places values into named categories. The different values within a set are unordered. Some examples of unordered scales include gender (Male/Female) and marital status (single/married/divorced). Text fields should be classified as nominal.
Ordered (ordinal)	The ordered, or ordinal, scale places values in a set order. Ordinal data show a particular value's position relative to other values, such as "low, medium, high, etc." The ordinal scale doesn't indicate the distance between each item. Some examples of ordered scales include level of agreement (Strongly agree, Agree, Disagree, Strongly disagree), or age class (Juvenile, Sub-adult, Adult).
Relative (interval)	The relative, or interval, scale uses a measurement scale of equal-sized units (e.g., degrees Celsius). The scale starts from an arbitrary point (not a meaningful zero), and so there is no concept of 'zero' of the measured quantity. Consequently, ratios of relative values are not meaningful. Some examples of relative scales include the Celsius temperature scale and the Fahrenheit temperature scale.
Absolute (ratio)	The absolute, or ratio, scale is an interval scale with a meaningful zero point. The ratio scale begins at a true zero point that represents an absolute lack of the quality being measured. Thus, ratios of values are meaningful. Examples of absolute, or ratio, scales include elevation (measured from sea-level), height, and the Kelvin temperature scale.
Date-Time	Examples of date-time values are '2003-05-05', '1999/10/10', and '2001-10-10T14:23:20.3'.

**Table 2:** The five measurement scales used in Morpho. Each scale is a superset of the ones beneath it in the table.



**Figure 7.8:** Select “Codes are defined here” as the Location setting to define codes in the wizard.

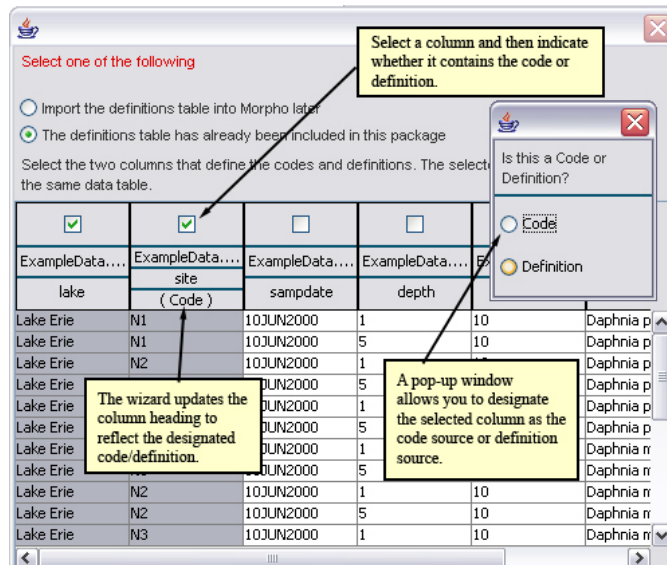


**Figure 7.9:** Select “Codes are imported from another table” under the Location setting to select code definitions from the imported data table (or to import the definition table later).

code used by the values so that users know what each represents (e.g., M=“male”; F=“female”, etc). To define codes manually in the Data Table Wizard, select “Codes are defined here” under Location (Figure 7.8). You can also choose to import codes from an existing data table by selecting “Codes are imported from another table” under Location (Figure 7.9).

Clicking the “locate” button brings you to the screen that allows you to import the codes later (“Import the definitions table into Morpho later”). If you are importing a data table and the codes and their definitions are already contained in it, you can also choose to select the codes/definitions from the table (Figure 7.10). When “The definitions table has already been included in this package” is selected, the Data Table wizard displays the contents of the included data tables, allowing you to select the column that contains the code and the column that contains the definition. Click OK to update the “Definitions” setting with the selected codes and definitions.

Note the check-box at the bottom of the Define Attribute or Column screen. Check this box if your columns of data contain free-text, such as



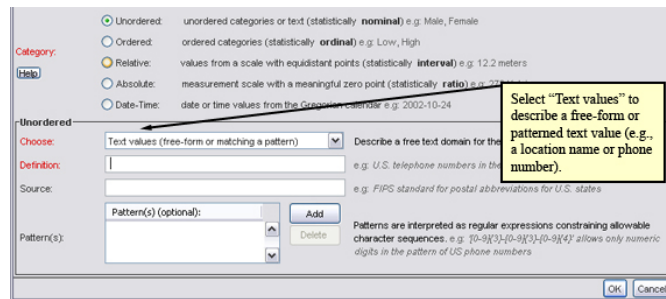
**Figure 7.10:** Selecting codes and definitions from the imported data table.

notes, in addition to the defined codes you provide in the “Definitions” table.

If the data in the attribute or column are unordered text values, choose “Unordered” from the “Category” list, and choose “Text values (free-form or matching a pattern)” from the drop-down menu next to “Choose”. The wizard prompts you to define the text values, and provide the name of their source, if applicable (Figure 7.11). You can optionally define the pattern of the text values by clicking the “Add” button, and typing the pattern into the “Pattern(s)” table.

**Ordered (ordinal)** Ordered data show a particular value’s position relative to other values, such as “low, medium, high.” The ordinal scale does not indicate the distance between each item. Examples of ordered scales include level of agreement (Strongly agree, Agree, Disagree, Strongly disagree), or age class (Adult, Sub-adult, Juvenile).

If the data column contains data measured on an ordered scale, select “Ordered” as the attribute category. The user interface for defining ordered values is the same as the one for defining unordered values. See [Unordered \(nominal\)](#) for more information about the required fields.



**Figure 7.11:** Select “Text values (free-form or matching a pattern)” to identify unordered text values. You are required to specify a definition for unordered text values.

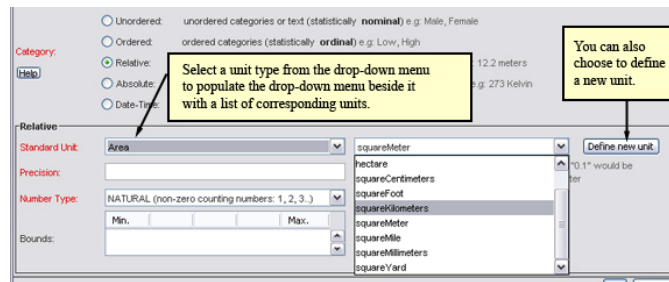
**Relative (interval)** The relative, or interval, scale uses a measurement scale of equal-sized units (e.g., degrees Celsius). The scale starts from an arbitrary point (not a meaningful zero), and so there is no concept of ‘zero’ of the measured quantity. Consequently, ratios of relative values are not meaningful. For example, one cannot infer that someone with a score of 80 on an ecology test knows twice as much ecology as someone who scores 40 on the test, or that an object at 40 degrees C has twice the kinetic energy as an object at 20 degrees C. Some example of relative scales include the Celsius temperature scale and the Fahrenheit temperature scale.

NOTE: To make ratio comparisons legitimate, interval values must first be converted to **absolute values** (in general, absolute scales are much more common). For example, convert Celsius temperatures (relative values) to Kelvin (an absolute scale with a real 0 point). An object at 40 degrees C is 313.15 degrees Kelvin and an object at 20 degrees C is 293.15 degrees Kelvin. The first object has approximately 1.07 times more kinetic energy than the second (not twice as much).

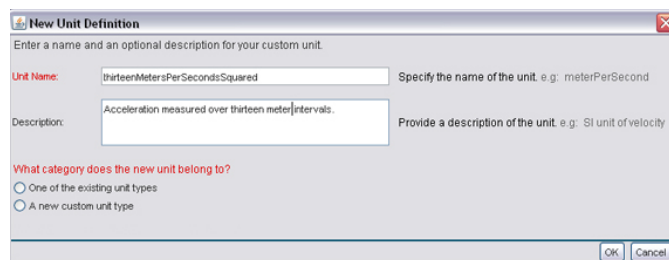
If the data column contains data measured on a relative scale, select “Relative” as the attribute category. The Data Table wizard updates to include fields for specifying the measurement unit and precision, as well as the type of number used (e.g., natural or integer) (Figure 7.12).

When specifying a unit, first select the unit type (i.e., measurement category) from the drop-down menu beside “Standard Unit”. Each unit type contains units for measuring it. For example, the “Speed” unit type includes units such as “metersPerSecond” and “milesPerHour.” Once you select a unit type, the drop-down menu to the right will automatically be populated with corresponding units.

If the unit used by your data does not appear in the unit drop-down



**Figure 7.12:** Defining units and precision for a relative measurement scale.



**Figure 7.13:** Entering a new unit name and description.

menu, you can define a new unit to represent it. For example, if your data includes acceleration measurements (the change in velocity over time, expressed by the **SI unit**  $m/s^2$ ) for thirteen-meter intervals instead of one-meter intervals, you would define a new unit thirteenMetersPerSecondSquared (as opposed to the existing measurement, metersPerSecondSquared). To do this, click the “Define New Unit” button and enter a name and description for the unit (Figure 7.13).

Once you have created a unit name and description, specify whether the new unit belongs to an existing unit type, or to a new custom unit type. Please note that at this time, the interface for defining a new custom unit type is incomplete. See the [text box](#) for more information. In the acceleration example presented in Figure 7.13, the new unit belongs to an existing type (Acceleration). Select the “One of the existing unit types” radio button (Figure 7.14) and then select the unit type. You must also specify the Multiplier (in this case .0769) that can be used to convert the custom unit ( $13m/s^2$ ) to the SI unit ( $m/s^2$ ).



**New Unit Definition**

Enter a name and an optional description for your custom unit.

**Unit Name:**  Specify the name of the unit. e.g. meterPerSecond

**Description:**  Provide a description of the unit. e.g. SI unit of velocity

**What category does the new unit belong to?**

One of the existing unit types  
 A new custom unit type

**Select the unit type that the new unit belongs to**

**Unit Type:** Acceleration

Unit	Power
Length	1
Time	-2

**Unit Type Definition:** Definition for the selected unit category. It is represented as a product of the basic unit types and an exponential (power) factor.

**SI Unit:**  SI unit for the selected unit category.

**Multiplier:**  e.g. 0.001

OK Cancel

**Figure 7.14:** Defining a new unit based on one of the existing unit types. The example above shows the fields that appear if you are defining a unit of type “Acceleration”.

### ***A Note about Custom Unit Types***

Currently, you cannot use the Morpho wizard to create a new custom unit type because the interface does not permit you to associate a new SI unit with that unit. We are working to enable this functionality, which will ship with the next release of Morpho.

**New Unit Definition**

Enter a name and an optional description for your custom unit.

**Unit Name:**  Specify the name of the unit. e.g. meterPerSecond

**Description:**  Provide a description of the unit. e.g. SI unit of velocity

**What category does the new unit belong to?**

One of the existing unit types  
 A new custom unit type

**Enter the name of the new unit type**

**Unit Type:**

**Provide a definition for this custom unit, in terms of the basic unit types shown, and**

Unit	Power
Length	-2
Dimensionless	1
Time	-1

**Unit Type Definition:** Define the unit based on existing basic units (e.g., length and time). Unit = Time Power = -1

**Choose the SI unit for this unit type and optionally define the multiplier to convert the new unit to the chosen SI unit**

**SI Unit:**  SI unit for the selected unit category.

**Multiplier:**  e.g. 0.001

OK Cancel

A custom unit type is required when the new unit does not belong to an existing unit type. For example, if your data set contains measurements for “number of bees sighted per square meter per six seconds,” you would have to define a new unit type to represent that measurement. This new unit for measuring bees is a custom type, “Areal Density Rate.” An example of a new unit that belongs to an existing unit type is “bees per 10 square meters,” where you simply wish to apply a multiplier to the existing unit (number per meter squared, an “Areal Density”). Note that you can define new units that belong to existing types.

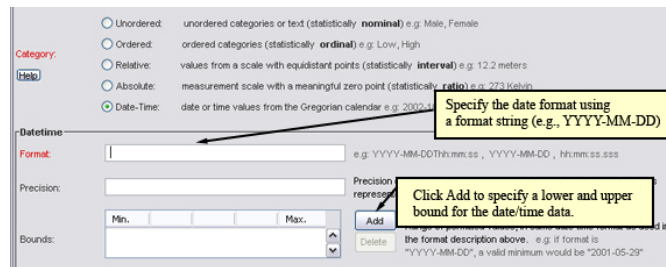
To define the new unit, create a definition using basic units (e.g., “length” and “time”) and specify an exponential factor (e.g., 1 or -1). To define our measurement “number of bees sighted per square meter per six seconds”, click the Add button and select “Length” from the Unit drop-down menu. Set the Length unit’s power to -2. Click “Add” again and choose “Time” from the Unit drop-down menu. Set the Time unit’s power to -1. Click “Add” a third time and choose “Dimensionless” from the drop-down menu. Set the Dimensionless unit’s power to 1. Putting those three units together according to the indicated powers gives you a new unit of (number)/(time \* square meters).

You must also specify the **SI Unit** that corresponds to the new unit. The SI unit for a derived type is the base SI type for each part of the derivation. For example, the base SI unit for length is meter, and for time is second. The SI unit for velocity (distance/time) would therefore be  $m/s$ . The SI unit that represents the unit we derived to represent bees per square meter per six seconds is  $1/sm^2$ . If known, you can also provide the conversion factor that converts your unit to the SI unit (in the Multiplier field).

After choosing or defining the unit, specify the precision of the data in the Precision field (Figure 7.12). For example, if the attribute is measured in meters, a precision of “0.1” would be interpreted as precise to the nearest 1/10th of a meter. You must also choose the number type used by the data: natural, whole, integer, or real (Table 3). The four number types in the drop-down menu are not discrete classes - some overlap. Remember to choose the type that most specifically and accurately describes the data in the attribute or column you are defining. Optionally, you can provide the minimum and maximum values for the data column by clicking the Add button beside the Bounds field at the bottom of the screen.

Number Type	Description
Natural numbers	Natural numbers are positive and non-zero counting numbers (i.e., non-fractions), such as 1, 2, 3, and so on. They cannot be negative or zero. When thinking of counting numbers, think about counting a basket of oranges, or counting something using your fingers (although natural numbers can be larger than ten). There are no fractions of oranges or fractions of fingers (hopefully!), and there are no negative numbers of oranges or negative numbers of fingers. Natural numbers are one type of whole numbers.
Whole numbers	Whole numbers are just like natural numbers, except zero is included in the set of whole numbers, and therefore whole numbers are positive counting numbers and zero: 0, 1, 2, 3, and so on. Just like natural numbers, they cannot be fractions or negative. Whole numbers are a type of integer, and they include natural numbers.
Integer numbers	Integers are just like whole numbers, except negative counting numbers are included in this set. Therefore integers are positive and negative counting numbers and zero, such as -3, -2, -1, 0, 1, 2, 3, and so on. Just like whole and natural numbers they cannot be fractions. Integers are a type of rational numbers, and they include whole numbers and natural numbers.
Real numbers	Real numbers are the broadest set of numbers. They can be negative and positive fractions and counting numbers, and can include zero. Therefore a list of numbers like the following would be a set of real numbers: $-1/2$ , $-0.25$ , $3.14$ , $0$ , $1$ , $-25$ , $5/8$ , and so on. As you can see from this list of examples, real numbers include integers, whole numbers, and natural numbers.

**Table 3:** The four number types used by data attributes.



**Figure 7.15:** Specifying a date format using format strings. Optionally, you can specify the precision as well as an upper and lower bound for the data.

**Absolute (ratio)** The absolute, or ratio, scale is an interval scale with a meaningful zero point. The ratio scale begins at a true zero point that represents an absolute lack of the quality being measured. Thus, ratios of values are meaningful. For example, an object that is 100 meters above sea level is twice as high as an object that is 50 meters above sea level (where sea level is the zero point). Also, an object at 300 degrees Kelvin has three times the kinetic energy of an object at 100 degrees Kelvin (where absolute zero (no motion) defines the zero point of the Kelvin scale). Examples of absolute, or ratio, scales include elevation, height, area, and the Kelvin temperature scale. (Note: Absolute scales are much more common than [relative ones](#)).

If the data column contains data measured on an absolute scale, select “Absolute” as the attribute category. The user interface for defining absolute values is the same as the one for defining relative values. See [Relative \(interval\)](#) for more information about the required fields.

**Date-Time** Date and time values can be represented using several distinct notations (e.g., '2003-05-05', '1999/10/10', and '2001-10-10T14:23:20.3'), and the metadata must document the format used by the data in order to clearly communicate the values.

If the data column contains data measured on a date-time scale, select “Date-Time” as the attribute category. The Data Table wizard updates to include fields for specifying the date format and precision ([Figure 7.15](#)).

Type the format of the date and/or time in the field next to “Format” using an ISO 8601 format string like the examples given to the right of the field. For additional examples of date format strings, please see the [EML documentation](#). You can also provide the precision of the date and/or time

format and indicate the upper and/or lower bounds of the date and/or time using the “Bounds” table at the bottom of the screen.

**NOTE** Date and time values in the Gregorian calendar are very strange to use in calculations in that they have properties of both relative and absolute scales. They also have some properties that do not conform to the relative scale because of the adjustments that are made to time to account for the variations in the period of the Earth around the sun (e.g., leap years). While the Gregorian calendar has a meaningful zero point, it would be difficult to say that a value taken on midnight January 1, 1000 is twice as old as a value taken on midnight January 1, 2000 because the scale has many irregularities in length in practice. However, over short intervals the scale has equidistant points based on the SI second, and so can be considered relative for some purposes, especially with respect to measuring the timing of short-term ecological events.

### 7.3 Completing the Wizard

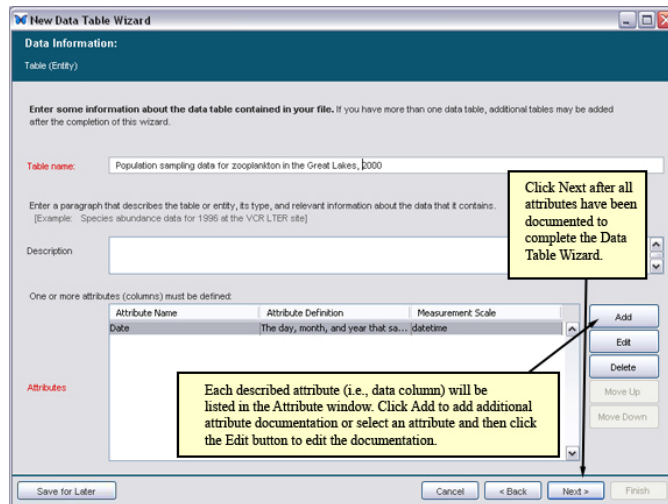
After you have finished stepping through the screens described in [section 7.2](#), you will have added a description of ONE of the attributes (i.e., columns of data) in the data table. The described attribute will appear in the Data Information screen ([Figure 7.16](#)).

To describe another attribute, click “Add”, and repeat the wizard steps for the new attribute. Note that if you choose to extract documentation automatically, you will not see this screen. For more information about extracting documentation automatically, please see the [Importing Documentation](#) section.

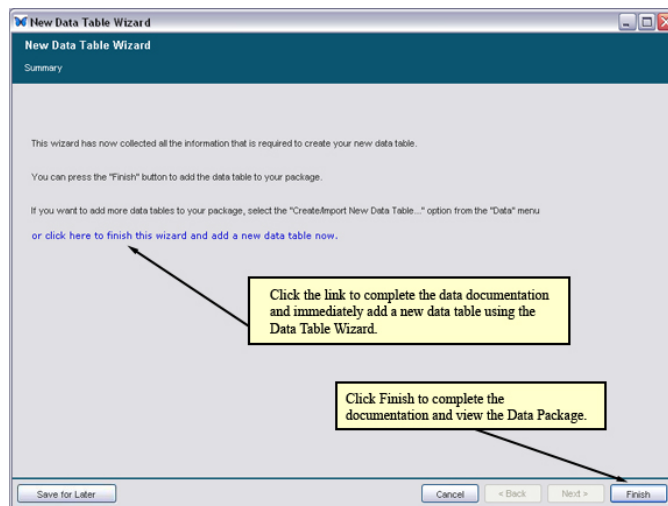
After you have documented all table attributes, click the Next button to view the final screen of the New Data Table wizard ([Figure 7.17](#)).

Click “Finish” to finish documenting the data table, and then save the data package to save your changes.

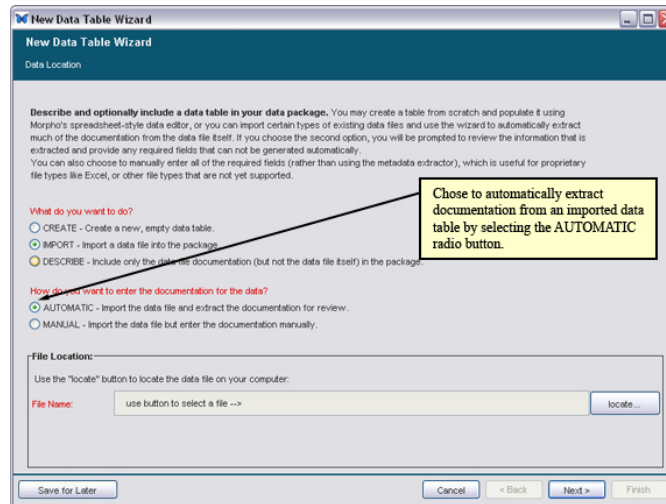
If you chose to create a data table when you started the wizard, Morpho will display the data package containing your new table documentation and an empty data table after you click Finish. Type data directly into the empty columns, or copy and paste data from elsewhere. Note that Morpho will not automatically create new rows and columns in the spreadsheet. If you choose to copy and paste a data table from elsewhere, make sure to add the appropriate number of rows and columns to the spreadsheet. For more information about working with spreadsheets in Morpho, see [section 7.12](#).



**Figure 7.16:** Documented data attributes are listed in the Attributes window. Click Add to document additional attributes.



**Figure 7.17:** To complete the Data Table wizard, click Finish or the "click here to finish this wizard and add a new data table now" link.



**Figure 7.18:** Automatically extract documentation from the imported data table and present it for review.

## 7.4 Importing Documentation

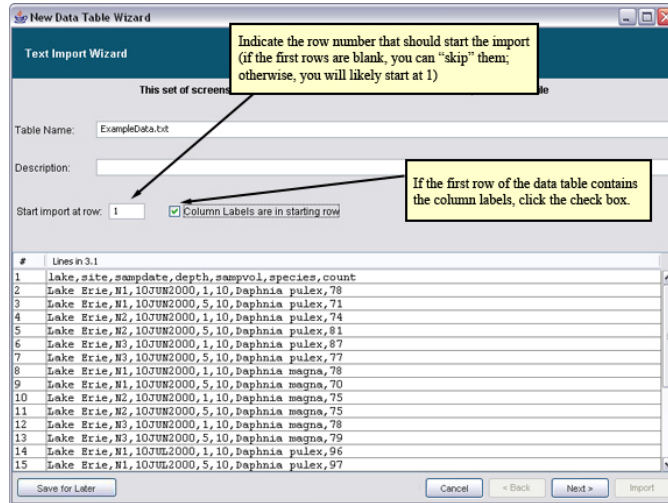
Often, some of the documentation that belongs in a data table's metadata is contained in the data table itself (e.g., column headers and table names as well as codes). If you choose to import a data table, you can simplify the process of entering documentation by choosing to automatically extract it from the table (Figure 7.18).

When you choose to automatically extract documentation, the Data Table wizard displays the imported data table and prompts you to specify a table name, description, and additional information that helps Morpho import the documentation correctly (Figure 7.19).

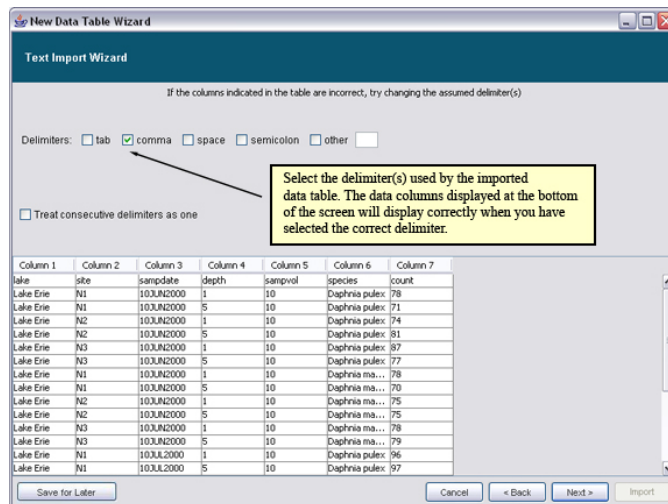
If the first few rows of the data table are blank, you can choose to begin importing at a row other than "1" by specifying a later start row in the "Start import at row" field.

If the first row contains column labels (as in the example above), then check the box beside the "Column labels are in starting row" setting. Click Next to continue (Figure 7.20).

Select one or more delimiter, or specify a new delimiter in the "other" field. The data columns displayed at the bottom of the screen will display correctly when you have selected the correct delimiter or combination of delimiters. To indicate that consecutive delimiters be used as one, check the box beside "Treat consecutive delimiters as one." Click "Next" to review

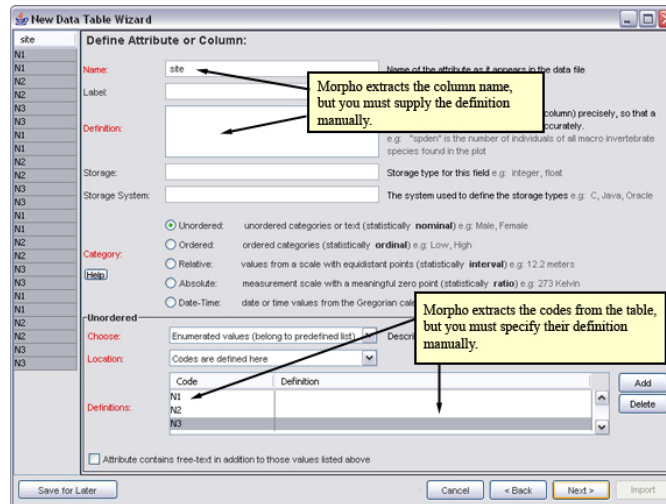


**Figure 7.19:** An example of importing a data table and automatically extracting the documentation. Your data may look significantly different from the sample data displayed.



**Figure 7.20:** Selecting the data table delimiters.





**Figure 7.21:** Reviewing extracted documentation.

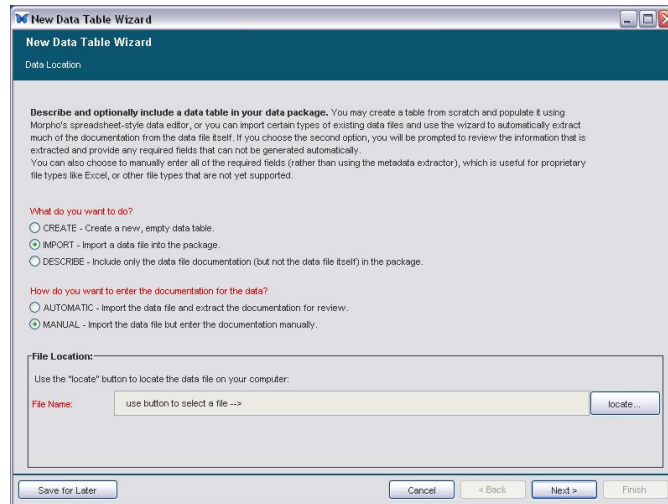
the extracted documentation (Figure 7.21).

Note that Morpho automatically places extracted codes in the table under “Code”, but you must provide the code definitions. You must also provide column definitions (Morpho does not do this automatically). Before clicking Next to review the next column of extracted documentation, examine the documentation to make sure all category, unit, and other documentation is correct. You can add to the documentation or change erroneous documentation in the fields provided. For more information about the fields in the Data Table wizard, please see [section 7.2](#).

## 7.5 Adding Other Data Table Types (E.g. Excel, Mathematica, HTML, or XML)

Data stored in proprietary binary formats such as Excel, Mathematica, or Word documents, can be added to data packages using the Data Table wizard. Although the current version of Morpho does not support displaying the content of most proprietary formats, such files can still be documented using the Morpho wizards and saved to a data package. If your data package contains data files stored in a proprietary format, you can view the data by exporting the data package to a convenient directory and using the creator application (e.g., Excel or Word) to open and view the data.

Note that applications such as Excel and Microsoft Access also permit you to export data as a simple delimited file, which can be imported into



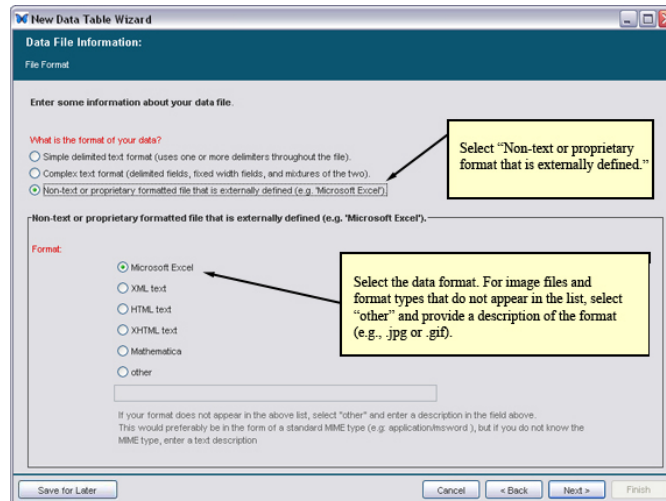
**Figure 7.22:** Adding an Excel or other proprietary data file to a data package.

Morpho and displayed. For example, to export Microsoft Access tables as delimited text files, click each data table and export it as a text file (under File > Export...). If you have data in an Excel workbook, simply save each worksheet as a text file using “Save As” and choosing the “Text (Tab-delimited)” format from the “Save as type” menu. Note that chart objects in Excel cannot be saved as text files.

To add a proprietary file to a data package:

1. Open the data package to which you wish to save the data file. From the Data menu at the top of the Data Package screen, select Create/Import new Data Table. The Data Table wizard opens.
2. In the Data Table wizard, select “Import” and “Manual” (Figure 7.22). Click the locate button to select the file to import. Click Next.
3. In the Data Table wizard’s File Format screen, select “Non-text or proprietary format that is externally defined,” and then choose the appropriate format from the list (Figure 7.23), or “other” if the data format does not appear in the list (e.g the MIME type or a short description). Note: It is often preferable to import image files as “other entities” as described in section 7.6.

Once you have identified the data file and its format, use the Data Table wizard to document it just as you would a delimited text file. For more



**Figure 7.23:** Adding a non-text or proprietary file to a data package.

information about using the Data Table Wizard to document data, see [section 7.2](#).

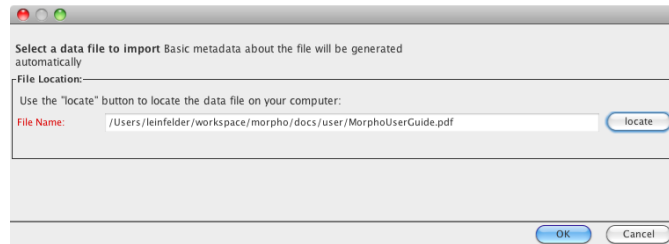
**NOTE** Complex, geospatially indexed images can be included in data packages and described in EML 2.0 and newer versions using the “spatialRaster” or “spatialVector” entity modules. However, the Morpho wizards currently do not support adding documentation to these modules. For more information about EML, please see the Guide to EML.

## 7.6 Adding Other Data Entities (E.g. binary files, images, PDFs)

While the Data Table import wizard can be used to import binary and proprietary data files, it should only be used when the file contains a describable data structure such that attribute-level documentation can be entered (as is the case with a tabular Excel worksheet). Data files that do not adhere to an entity/attribute structure (e.g. digitized field notes in PDF, specimen jpeg images) should be imported as “other entities”.

To add other data entities to a data package:

1. Open the data package to which you wish to save the data file. From the Data menu at the top of the Data Package screen, select “Import Other Data”.



**Figure 7.24:** Adding a binary or non-tabular data file to a data package.

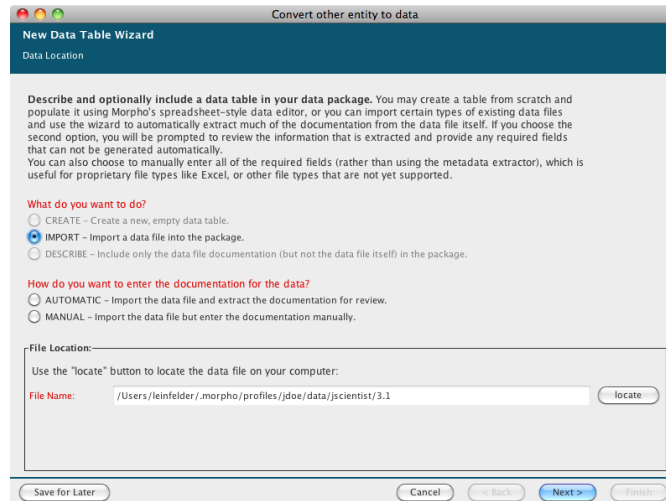
2. Select the file to be imported ([Figure 7.24](#)). Click the “locate” button to select the file to import.
3. Click “Ok”. Basic file metadata (file type and file size) will be collected automatically .

## 7.7 Converting Other Entities to Data Tables

If tabular data has previously been added to a Data Package as an “other entity” (e.g. using the KNB online data registry) it can be converted to a Data Table using the Data Table wizard. Attribute-level metadata is entered in the same way as it is when importing a new data table, but after the conversion, the old data entity will need to be explicitly removed from the data package.

To convert an other entity to a data table:

1. From the Data menu at the top of the Data Package screen, select “Convert Data to Table”.
2. The New Data Table Wizard will launch with the Data Location fields pre-populated ([Figure 7.25](#)).
3. Click “Next” to continue through the Data Table import wizard as described in [section 7.1.2](#)
4. When the wizard has completed, the original entity can be removed and the new table will be unaffected. See [section 7.12.7](#) for instructions on removing data entities.



**Figure 7.25:** Converting an other entity to a data table.

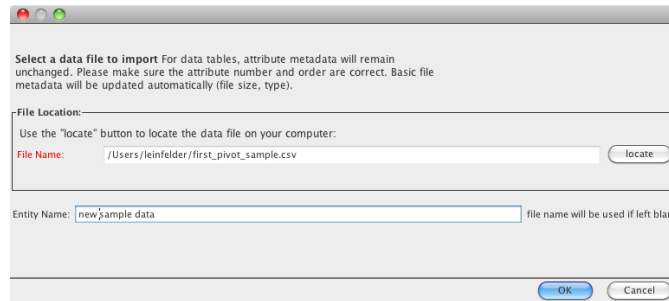
## 7.8 Replacing Data

Existing Data Tables can have their data replaced while still preserving the original metadata that was so meticulously entered during the initial import. This allows a data table to be described before the data is fully cleaned and finalized, thereby making Morpho useful for active data management.

**NOTE** When replacing the data content of a table, close attention must be paid to the table structure. The order and number of columns/attributes must remain the same or else the metadata will not match the new data.

To replace a data file:

1. From the Data menu at the top of the Data Package screen, select “Replace Current Data”.
2. Select the new data file to import ([Figure 7.26](#)).
3. Enter an optional name for the entity (the file name will be used if this is omitted).
4. Click “Ok”. The file size, and row count metadata will be recalculated automatically and saved in the entity metadata.



**Figure 7.26:** Replacing a data file.

## 7.9 Exporting Data Entities

In addition to the Data Package Export feature (see [section 9.3](#)), individual data entities can be exported. This is useful for binary or proprietary data files that cannot be displayed inside Morpho.

To export data entities:

1. Open the data package containing the data file.
2. From the Data menu at the top of the Data Package screen, select “Export Data”.
3. Specify a directory where the data will be exported. For organization, a subdirectory with the package ID will automatically be created in the directory you select.

## 7.10 Saving Incomplete Data Tables

Saving an incomplete data table description in the Data Table Wizard is similar to saving incomplete Data Packages. For more information, please see [section 6.3](#).

## 7.11 Recovering Incomplete Data Tables

Recovering an incomplete data table description is similar to Recovering Incomplete Data Packages. For more information, please see [section 6.4](#).

## 7.12 Working with Data Tables and Documentation

Once data have been created (or imported into Morpho) and documented, you can edit and/or manipulate the data using the options under the [Data menu](#) and [Edit menu](#). These options allow you to edit the data table documentation, to sort the data, to delete rows or columns of data, or to insert new rows or columns. You can also access these menu options by right-clicking a row or column in the data table.

- [Sorting Table Rows](#)
- [Inserting and Deleting Rows and Columns](#)
- [Editing Column Documentation](#)
- [Cutting, Copying, and Pasting Table Data](#)
- [Setting Access Control](#)
- [Reverting \(Undoing Changes\)](#)
- [Deleting Data](#)

### 7.12.1 Sorting Table Rows

To sort the rows of a data table, select the column which you would like to sort by, and click “Sort by Selected Column” ([Figure 7.27](#)). Morpho rearranges the rows of data according to the value of the selected column. The rows themselves remain unchanged, only repositioned.

### 7.12.2 Inserting and Deleting Rows and Columns

Morpho can insert and delete rows and columns of data (much like Microsoft Excel does). To insert a row/column, select the row/column adjacent to where you wish to insert the new cells. To select a column, click the column header or any item in the column. To select a row, click any item in the row. New rows and columns can be positioned on either side of the selected item ([Figure 7.28](#)). Inserting a new row simply creates a new, empty row (you can also create a new row by pressing CTRL-I). When you choose to insert a column, Morpho prompts you to specify attribute metadata for that column. After you have entered the metadata, Morpho creates the empty column for the corresponding data.

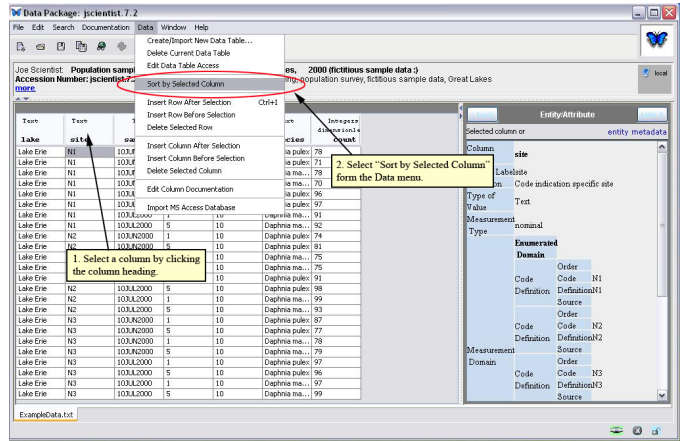


Figure 7.27: Sorting a data table.

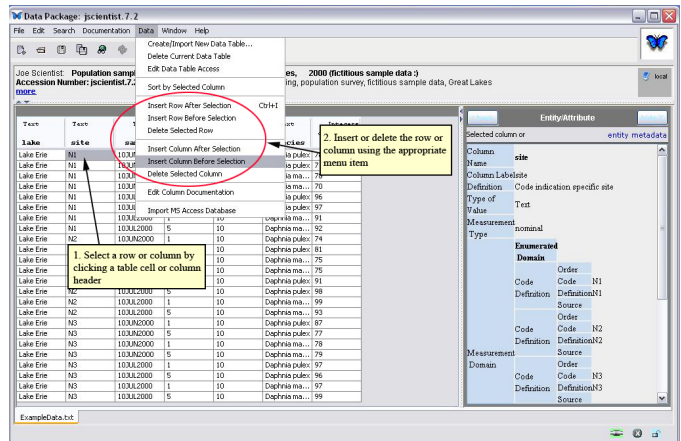


Figure 7.28: Inserting and deleting rows and columns.



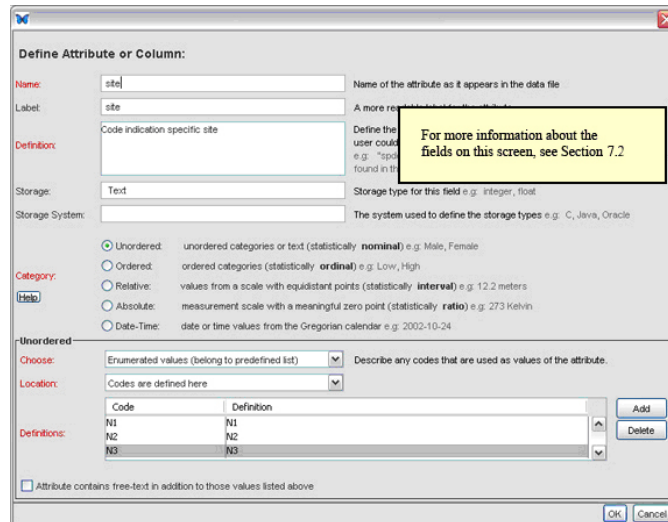


Figure 7.29: Adding or editing documentation to a table column.

### 7.12.3 Editing Column Documentation

To edit documentation entered using the Data Table Wizard, or to add additional documentation to a table column, select the column by clicking the column header or a cell beneath it and then select “Edit Column Documentation” from the Data menu.

Morpho will display the column documentation (Figure 7.29).

### 7.12.4 Cutting, Copying, and Pasting Table Data

Cut, copy, and paste functions can be accessed under the “Edit” menu (Figure 7.30) or using keyboard shortcuts: Ctrl+X for cut, Ctrl+V for paste, and Ctrl+C for copy. These functions work just as they do in Microsoft applications like Word and Excel.

Use cut, copy, and paste to relocate or delete rows and columns, or to paste data from an external data source (such as an Excel file) into Morpho. Note that Morpho does not automatically add new rows to the data table when information is pasted. Thus, if you want to add data by pasting them into Morpho’s spreadsheet editor, you must first create additional table rows to accommodate them. To create new rows, select the last row in the data table and press CTRL-I to insert a new empty row (or use the insert option in the Data or right-click menus). After creating the required number of new

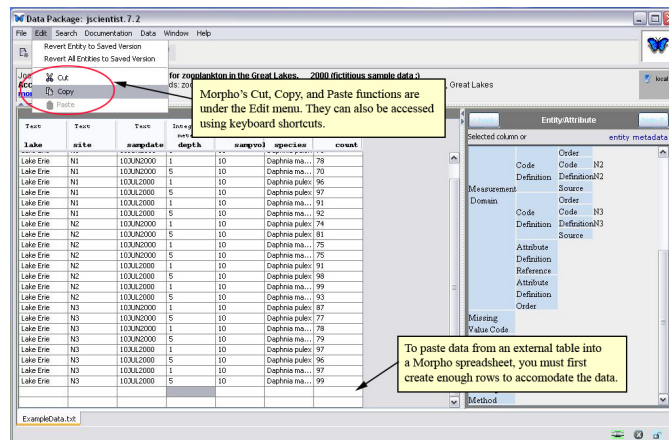


Figure 7.30: Cut, copy, and paste in Morpho.

rows, select the top empty row and paste the new data.

**NOTE** The default delimiter used when copying/pasting from Excel is a tab. If existing data uses a different delimiter (e.g., a comma), then the pasted data will end up in the first cell.

### 7.12.5 Setting Access Control

By default, the [access information specified for the data package](#) applies to all data tables in that package. To specify different permissions for a specific data table, select “Edit Data Table Access” from the Data menu (Figure 7.31).

The access customization screen opens (Figure 7.32), allowing you to specify read, write, change permissions access to individual users or groups. By default, access to the data entity is the same as that granted to the metadata. The settings will apply only to the table, and will override the default settings specified for the data package. For more information about access permissions, see [Access Information](#).

### 7.12.6 Reverting (Undoing Changes)

You can undo changes you have made to one or more of the tables in your data package as long as you have not saved the data package since making

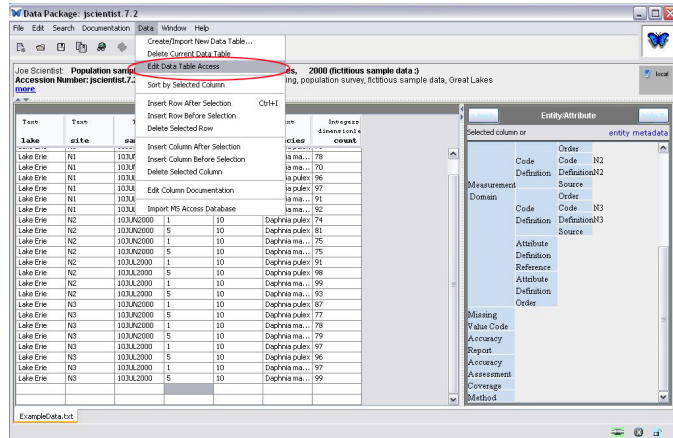


Figure 7.31: Editing the data table access.

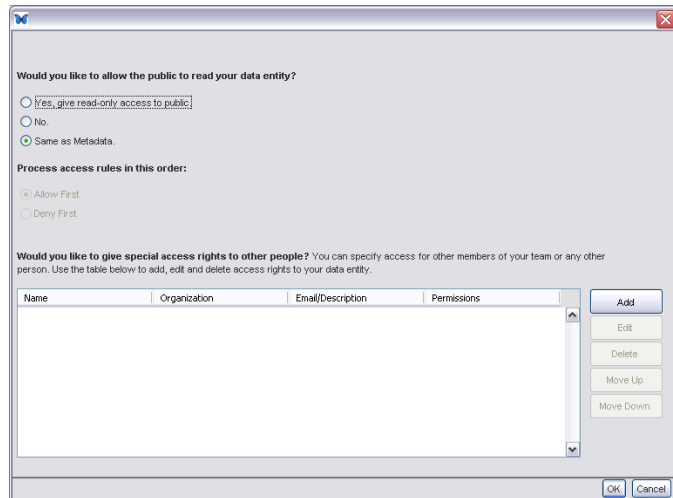


Figure 7.32: Setting access permissions for individual data objects.

the changes. To undo changes to the displayed table, select “Revert Entity to Saved Version” from the Edit menu. All changes made since the last time you saved the data package will be reversed.

To undo changes made to all of the tables in the data package, select “Revert All Entities to Saved Version” from the Edit menu.

### **7.12.7 Deleting Data**

Data Tables and Entities can be removed from the Data Package using the “Data > Delete Current Data” menu option. Before invoking this command, select the tab for the data that should be removed.

To undo this action, simply close the data package without saving it and then reopen the package.

## 8 Editing a Data Package

Once a data package has been created, you can edit its documentation in one of the following ways:

- using the Documentation menu items (for most editing)
- using the Morpho Editor

Either tool permits you to change or delete documentation entered using the Data Package wizard (or added to the data package in some other way). The Morpho Editor can be used to add additional kinds of documentation that are not included in the [Data Package wizard](#), but you will most often use the Documentation menu items. In this section, we will look at both the [Documentation menu items](#) and the [Morpho Editor](#) and how you can use them to modify documentation.

### 8.1 Using the Documentation Menu

The Documentation menu ([Figure 8.1](#)) is activated when the Morpho user opens an existing data package. The menu items invoke editing tools and/or data entry screens that, together, enable the user to edit any field in the data package documentation.

The first menu item, “Add/Edit Documentation” opens the Morpho Editor (described in [section 8.2](#)). The other menu items open editable form views of specific subsections of the documentation ([Table 4](#)). The form views are the same as the ones used in the Data Package Wizard to create a new data package. For more information about the fields in each editing screen, please see [section 6.2](#).

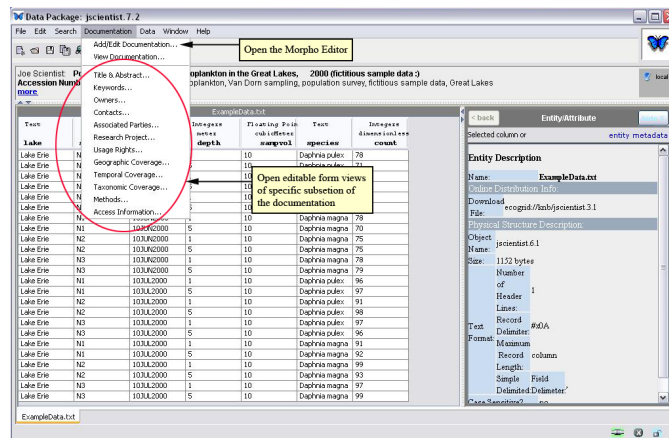
### 8.2 Using the Morpho Editor

Most editing is done with the options in the documentation menu. However, if there is a metadata field that is not included in the Documentation menus, you can use the Morpho Editor to access and modify it. The editor displays each module (the items describing the data package, such as its creator, usage rights, and documented data tables) so that users can select, display, and modify the content associated with each.

To open the Morpho Editor ([Figure 8.2](#)), open the data package you wish to edit and then do one of the following:

<b>Menu Item</b>	<b>Description</b>
Add/Edit Documentation	Invoke the full-featured <a href="#">Morpho Editor</a> , which provides editing access to all documentation fields in the data package. Note that the Editor is rarely required as most editing is done with the other options in the menu.
View Documentation	View all data package documentation in one window.
Title & Abstract	Modify the <a href="#">data package title and abstract</a> .
Keywords	Modify the <a href="#">keywords</a> (the significant words or phrases) that help identify the data set.
Owners	Modify the name or contact information of the <a href="#">data package owner</a> .
Contacts	Modify the name or contact information of the <a href="#">data package contact</a> .
Associated Parties	Modify the name or contact information for any <a href="#">parties associated</a> with the data package.
Research Project	Indicate whether or not the data package is part of a larger <a href="#">research project</a> .
Usage Rights	Modify the <a href="#">usage rights</a> for the data package.
Geographic Coverage	Modify the <a href="#">geographic coverage</a> of the data package.
Temporal Coverage	Modify the <a href="#">temporal coverage</a> of the data package.
Taxonomic Coverage	Modify the <a href="#">taxonomic coverage</a> of the data package.
Methods	Modify the <a href="#">methods and sampling design</a> documentation.
Access Permissions	Modify the <a href="#">access</a> rights granted to individuals and the public.

**Table 4:** Documentation menu items.



**Figure 8.1:** The Documentation menu items become active when a user opens an existing data package.

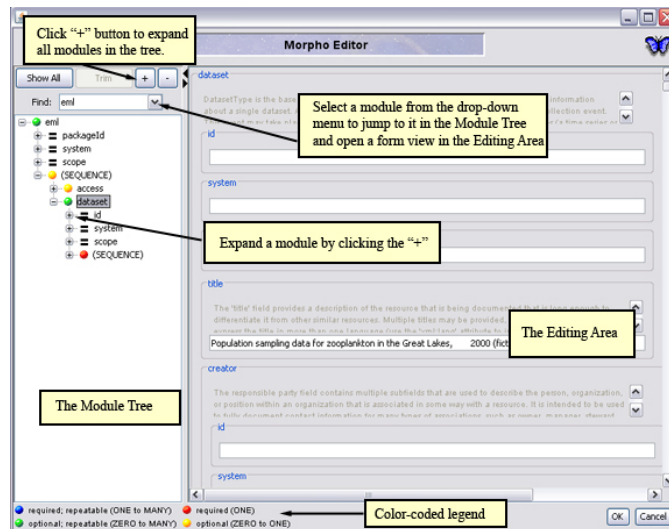
- select “Add/Edit Documentation” from the Documentation menu,
- right-click a data table or other data object within the data package, and choose “Add Documentation”.

The editor consists of two panels: the Module Tree (on the left) and the Editing Area (on the right). Click the “+” symbol next to each module to browse through the hierarchy (or use the scrollbar on the right side of the editing area to scroll through displayed fields). To expand and view all levels of the module tree, click on the “+” button at the top of the tree.

Initially, the Editor displays only the modules that already exist in the data package documentation. To view a module, select the module by clicking it. The Editor then displays a form-based view of the information contained in the selected module. To edit the content of a field, click the field and enter text. The ‘tab key’ moves the selection to the next editable field.

To add documentation for modules that are not initially displayed in the Module Tree, click the “Show All” button. The Morpho Editor displays all modules in the tree. To return to the original view, click “Trim.”

You can also open modules using the Find drop-down menu at the top of the Module Tree. For example, to edit documentation for a data table, select “dataTable” from the Find menu. The Morpho Editor expands the dataTable module. If the data package contains several data tables, select the one you wish to edit. Use the scroll bar at the right of the screen to scroll through the table attributes, or select “attributeList” from the Find menu to



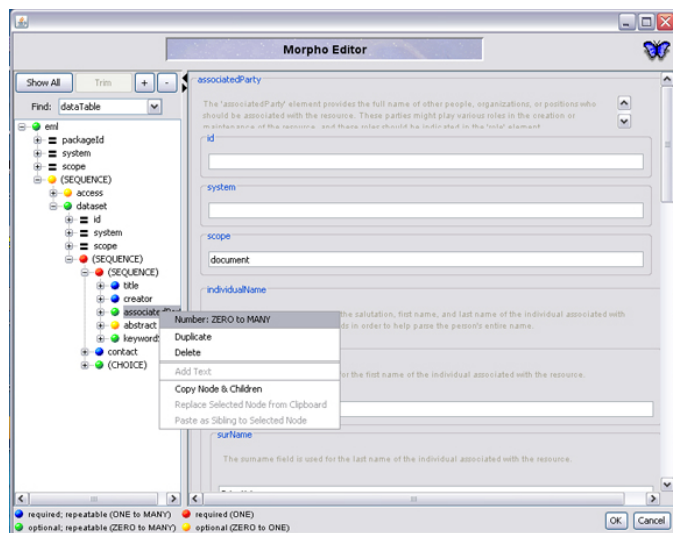
**Figure 8.2:** The Morpho Editor.

display the attributes in the module tree.

Modules are color-coded to indicate which are required and which are repeatable. Blue and red nodes are required. Green and yellow nodes are optional. Blue and green nodes are repeatable, meaning they can be duplicated (for example, you can specify multiple data set owners). Red nodes can be used only once, and yellow nodes can be used once or not at all (zero). The Morpho Editor includes a legend in the lower-left corner.

Right-click any module in the Module Tree to display a popup menu (Figure 8.3) containing options to duplicate, delete, or copy and paste that module. Note that these operations affect the selected module and all of its children. For example, if you choose to duplicate the keywordSet module, you will also duplicate the keyword modules that are nested inside it.





**Figure 8.3:** Right-click a module in the Module Tree to duplicate, delete, or copy that module and the modules nested inside it.

## 9 Sharing Data Packages

Because Morpho seamlessly connects to a network, you can easily share your data packages with colleagues and/or view and open data packages created by other scientists. After you have created a data package on your local system, upload it to the network to share it with other users (you control which users can view your data package via access permissions). If other users have granted you permission to view their data packages, you can also download data packages from the network and open them on your computer.

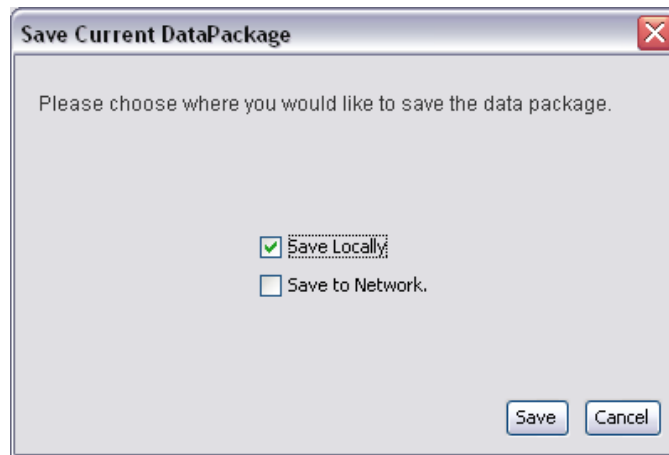
By default, Morpho will share data packages on the KNB Metacat network. If you wish to share data packages on another Metacat network, you must specify the Metacat URL under [Morpho Preferences](#). To open the Preference screen and change the network ([Figure 11.1](#)), select “Set preferences” from the File menu.

### 9.1 Uploading Data Packages to a Network

After creating a data package and setting the Metacat URL (under File > Preferences), place the data package on the network in one of two ways: by saving the data package or by synchronizing it. Use Save to save the package to the local machine and/or the network. Use synchronize to compare an existing data package on your local system to those on the network and upload or download the package (if the versions differ), ensuring that the local and network copies are identical. For example, if you have made local changes that have not been saved to the network (i.e., the local copy is more recent), then Synchronize will transfer the local copy to the network. If a document was updated on another computer (i.e., the network copy is more recent), then Synchronize will copy the network version to your local machine.

To save a package to the network using the Save item in the File menu, select the menu item and then choose whether to save the package locally, on the network, or both ([Figure 9.1](#)). Check “Save to Network” (or both “Save to Network” and “Save Locally”) and click “Save”. If the data package is in EML 2.0.1 or earlier, you will also see an option to “Upgrade to latest EML (eml-2.1.0).”

**NOTE** Morpho automatically displays data packages stored in earlier versions of EML (e.g., 2.0 or Beta 6) as EML 2.0. If a package does not



**Figure 9.1:** Select the location(s) to which to save the data package.

use the latest EML format, Morpho will prompt users to transform the EML to the latest version. If you choose to transform the EML, you must save the data package to preserve the changes, at which time the revision number of the document will be incremented. If the updated EML document is invalid (e.g., a required metadata field is blank), a correction wizard opens to allow users to fix the problem. For more information, please see [section 12](#).

To synchronize your data package, select “Synchronize” from the File menu and then click the Execute button ([Figure 9.2](#)). If you have made changes to the local version of a package, the synchronize action will copy the local package to the network, ensuring that the remote and local versions are identical. If a package was updated on another computer (i.e., the network copy is more recent), then Synchronize will copy the network version to your local machine. Note that you cannot synchronize an unsaved package.

## 9.2 Downloading Data Packages from a Network

Users can download packages from a network to view and edit in Morpho (in which case synchronization should be used) or to open with a local application such as Excel (in which case an export should be used). To download a data package from the network:



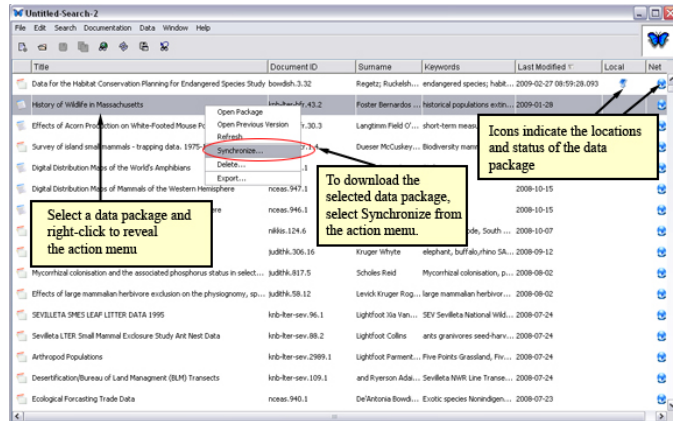
**Figure 9.2:** Synchronizing a data package.

1. From the [Work with your data...](#) panel on the main Morpho screen, select "Open an existing data package..." (to access your data package library) or "Search for an existing data package..." (to access packages created by other users).
2. Select a data package and right-click to reveal a drop-down action menu ([Figure 9.3](#)). Select the Synchronize menu item. Note: You can also choose to synchronize from the File menu.
3. Morpho will copy the selected data package to your local system, ensuring that the local and network copies are identical.

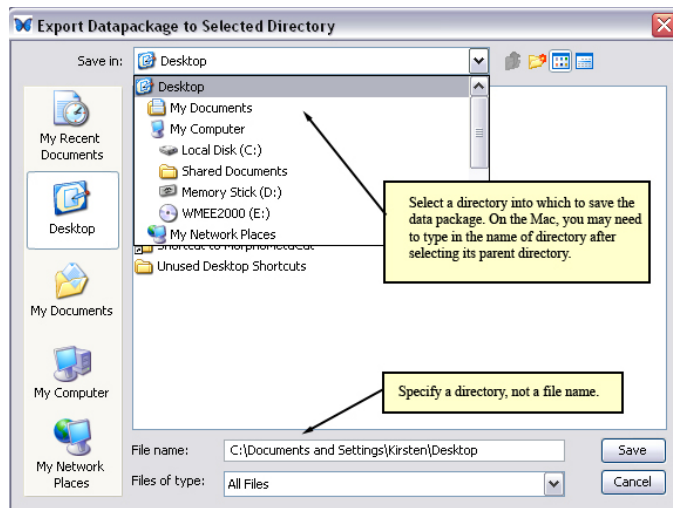
### 9.3 Exporting Data Packages

To save a data package for use outside Morpho (such as with Excel), choose to Export the package. To export a package, follow the steps for synchronizing, except choose Export from the drop-down action menu. You can export to a directory or to a .zip file, which will allow you to easily transport the package. If you choose to export to a directory, you will be prompted to select a directory ([Figure 9.4](#)).

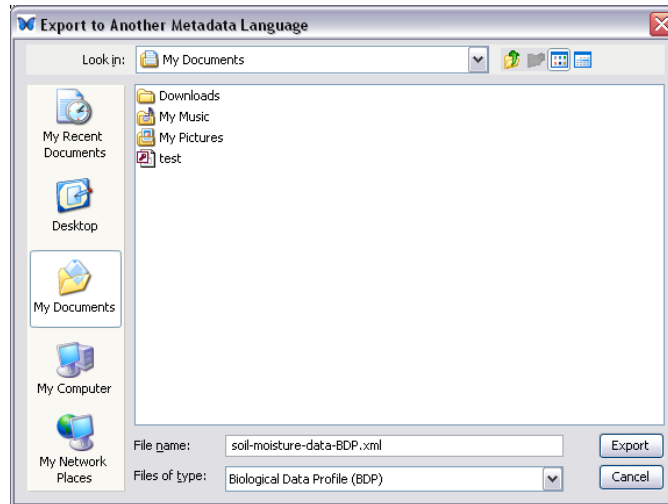
Note that you must specify a directory, not a file. Select a directory into which to export the package. On the Mac, you may need to type the name of directory after selecting its parent directory. The exported metadata and



**Figure 9.3:** To download a data package, choose synchronize from the right-click menu.



**Figure 9.4:** Exporting a data package to a directory. Select a directory.



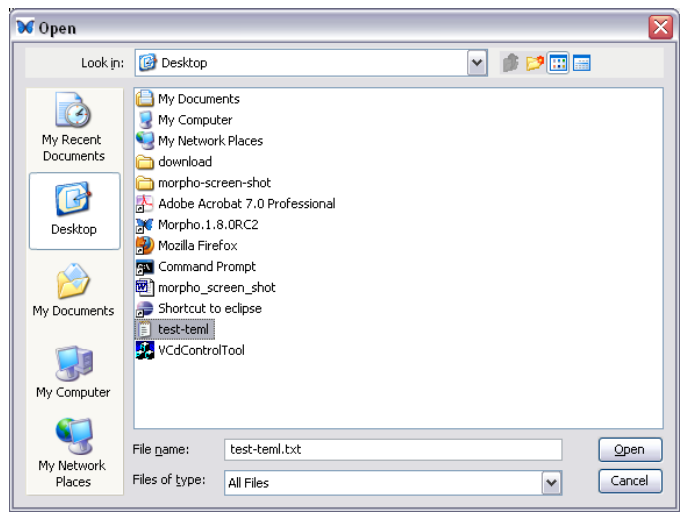
**Figure 9.5:** Exporting a data package to another metadata format.

data (if your data package includes data) will be exported to the specified directory.

EML data packages can be exported as different metadata language standards (Figure 9.5). Currently Morpho can produce files in the Biological Data Profile format.

#### **9.4 Importing an EML file as a new Data Package**

EML files on the local file system can be imported into Morpho as a new data package (Figure 9.6). The data package can then be saved to network for sharing. Select the Import menu item from the File menu to start the import process.



**Figure 9.6:** Importing an EML file into Morpho as a Data Package.

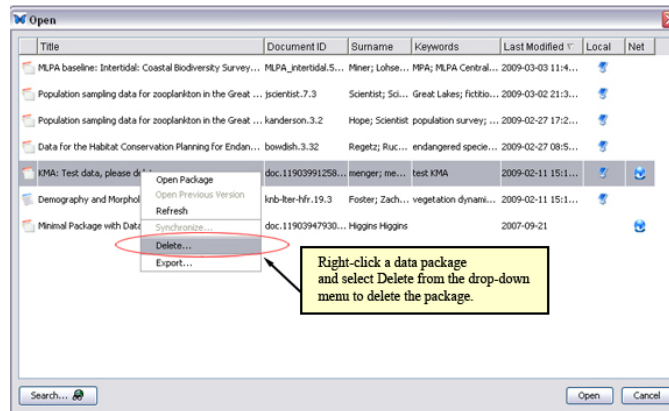


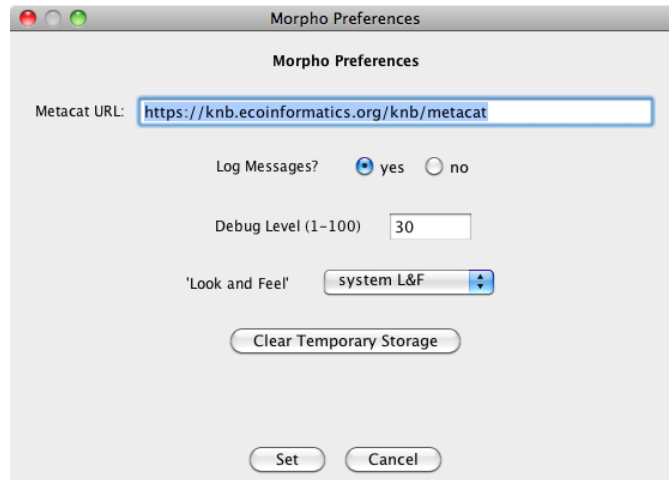
Figure 10.1: Deleting a data package.

## 10 Deleting Data Packages

You can remove any data package that you have created both from the network and/or your local machine by choosing to open or search for data packages, and then selecting the package you wish to delete from the listed packages. Right-click the data package and select “Delete” from the drop-down menu (Figure 10.1). You cannot delete packages that other users have created unless they have granted you special permissions. Also, deleting packages from the network does not technically delete them: deleted packages are archived and excluded from searches.

Before deleting the data package, Morpho asks for confirmation. Choose whether to delete a local copy, a network copy, or both local and network copies using the check boxes on the confirmation screen.





**Figure 11.1:** The Morpho Preferences at the default settings.

## 11 Setting Preferences

Use Morpho preferences to set a Metacat URL, customize the look and feel of the application, and adjust settings that affect logging and debugging. Select “Set preferences...” under the File menu to open the Morpho Preferences screen (Figure 11.1).

**Metacat URL** The Metacat URL contains the URL of the network (a Metacat server) where data are stored. By default, the Metacat URL points to the KNB Metacat server. Change the default only if you are using a custom server.

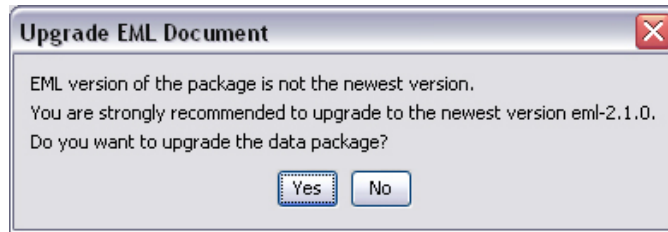
**Log Messages** The Log Messages preference, when set to “yes” (the default), specifies that error messages be written to a log file. The log file is called “stderr.log” and can be found in the Morpho startup directory. If you are experiencing problems with the application, examining the log file (or sending it to Morpho developers to examine) may provide clues to the cause. Note that the log file is rewritten every time Morpho starts up. You must rename the file if you want to save it.

**Debug Level (1-100)** The debug level (set to 30 by default) configures the debugging level used to log. A level of 1 returns only the most severe

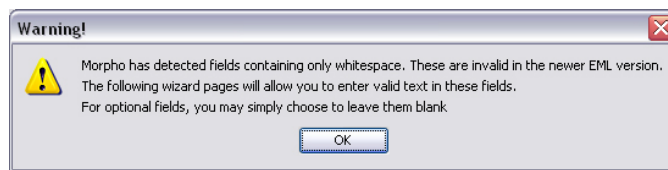
errors. A level of 100 returns every possible error.

**Look and Feel** Select an option from the drop-down menu. “system L&F” (the default) instructs Morpho to mimic the look of the current operating system (e.g., Windows, Mac, etc) “kunststoff” is a customized look-and-feel created for Java applications.

**Clear Temporary Storage** The “Clear Temporary Storage” option empties the Morpho cache, which contains downloaded data sets. Under most circumstances, you do not need to use this option. However, if you have downloaded many large data sets and are running low on hard drive space, you may wish to use this option. Note that when you clear the cache, Morpho must re-download each data set the next time you require it.



**Figure 12.1:** Morpho prompts users to upgrade EML for older packages.



**Figure 12.2:** If Morpho detects that the upgraded EML has fields containing only whitespace, it will prompt you to use the correction wizard to specify a new value.

## 12 Upgrading EML

Morpho displays older EML packages (e.g., 2.0 or Beta 6), but will automatically convert them to EML 2.0 for display. If a package does not use the latest EML format, Morpho will prompt users to upgrade the EML to the latest version (Figure 12.1). After completing the upgrade, you must save the data package to preserve the changes, at which time the revision number of the document will be incremented. Please note that if you choose not to upgrade the EML, Morpho will not allow you to edit the document.

If a user chooses to upgrade the EML and the upgraded EML document is invalid (e.g., it contains only whitespace for a required metadata field), Morpho will prompt you to use the Correction Wizard to fix the problem (Figure 12.2).

The correction wizard (Figure 12.3) steps you through the blank metadata screens. Note that in some cases, you will be required to use the Morpho Editor to supply information. The wizard will notify you if this is the case, and will open the Morpho Editor with a text-field to collect the missing information (Figure 12.4). Enter the appropriate value and click OK.

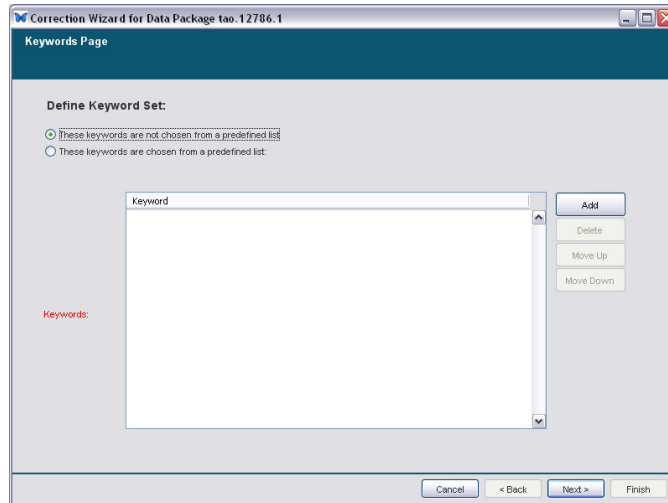


Figure 12.3: Morpho's Correction Wizard prompts you to enter the required information.

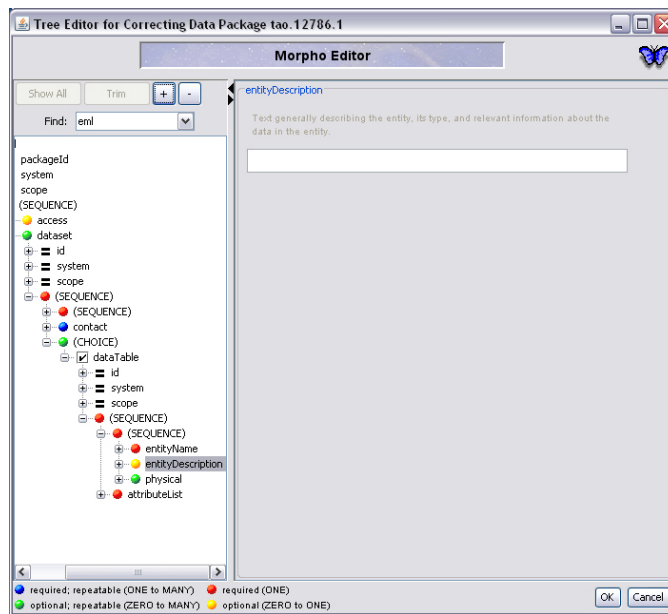


Figure 12.4: If required, the Correction Wizard opens the Morpho Editor to collect additional required information.

## 13 Technical Notes

For those who are interested in technical details, the Morpho editor is an XML editor. It works by first reading an XML file and building an outline (tree) view of the XML document. XML files can have formalized templates called “DTD’s” (Document Type Definition), which describe how the document can be constructed. If the XML document indicates that its structure should conform to a DTD, then the DTD is scanned and a single instance of any optional nodes not present in the original is added to the hierarchy. Finally, if the editor has additional data about the document type, it will add that data as custom displays or help information about the node, as is shown in the above examples. The editor can thus be customized to display the XML data in a variety of ways.