PlutoF

When and why to use Projects 🌍 in PlutoF?

Grouping and organizing **data** for efficient **bulk** management.
Managing user **access rights** and **roles**.
Setting up targeted **data gathering** events.
Organizing data for **publishing** articles or datasets.
Storing **metadata** efficiently.

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Project 🌍 data access rights

Occurrences under **Project** get their rights from **Project**.
Managed by project **Managing Group**.
Regular user - add data, edit own data.
Moderator - add data, edit all data under this project.
Owner - delete project and data, add new moderators.

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Bulk linking occurrences to Project 🌍 using Clipboard 📋

Send occurrences to **Clipboard**.
Select occurrences.
Clipboard → Bulk Operations → General Data.
Project field "Edit" select new **Project.**
Update.

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How to create a child Project (🌍) in PlutoF - two ways

Create new/edit **Project** and choose existing **Parent** project.
 -   or
Open existing **Project.**
Go to **Child projects** panel and press **New.**

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How to link Permits, Files, References, External Links with Project (🌍)

Open **Project** → Edit → **Associated Data** panel
Select tab.

Configure default Project (🌍) for your PlutoF workbench

Go to **Settings** → Default values → "Default project".
Select your **Project**.
Press **Save**.

(Utilize the quick links to choose your default **Project** from all modules within PlutoF)

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How to create a private Project (🌍)

Create new/edit **Project.**
Access Rights panel.
Set visibility → **Private.**

(Private **Projects** and **data** under it can ONLY be accessed by Project **members**)

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How to create crowdsourcing Project - public linking

Create new/edit **Project.**
Access Rights panel.
Set "Visibility" → **Public.**
Set "Linking" → **Public.**

*(Every PlutoF user can see this **Project** and link taxon occurrences with it)*

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Message to Project (🌍) members

Open the **Project.**
Navigate to the **Managing Group** panel.
Look for and click on the **Email** button.
A message will be sent to the email address provided during the registration process.

(Only **members** of the Project are authorized to send messages.)

Send Project 🌍 data to Clipboard 📋

1. Open **Project.**
2. Navigate to the **Related Records** panel.
3. Look for and click on the **Page** or **All** buttons.
*(Page = Send **page** to Clipboard, All = Send **all** records to Clipboard.)*
4. Confirm if data will be **appended to** or **overwritten.**
(Append = new data will be appended to existing data on Clipboard, Overwrite = Clipboard will be cleared before adding new data)

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Link new Taxon Occurrences under Project 🌍 - (2 ways)

1. Open **Project** →Navigate to the **Related Records** panel → Select Occurrence type (tab) and click on the **New** button → **Project** field is now pre-selected.

2. Open Taxon Occurrence add/edit form → Navigate to the **Project** panel → Select **Project name** using autocomplete field.

Create new Sampling Areas 📍 under Project 🌍

1. Open **Project.**
2. Navigate to the **Sampling Areas** panel.
3. Look for and click on the **New** button.
4. New **Sampling Area** form is opened → Create Area (point, polygon) → Give it a **Name** → **Save.**

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How to configure/curate data gathering for Project 🌍 using Forms?

1. Open the **Project.**
2. Look for a field **Allowed mainforms**.
3. Use autocomplete functionality to select **Form name**.

*(By configuring the **Project** using **forms**, data entry will be restricted solely to the specified **forms**. This allows for **moderation** and oversight by experts.)*

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Set up Specimen or Sample Identifiers and QR Codes for your Project 🌍

1. Open new/edit **Project.**
2. Navigate to the **Occurrence Identifiers** panel.
3. Look for and click on the **Define format** button.
4. Click on the **Reserve block** button.
5. Configure: for who, first ID, last ID or block length.
6. Save the **Project**.

QR Codes for Project 🌍 data gathering using PlutoF GO

1. Open **Project.**
2. Navigate to the **Reserved identifier blocks** panel.
3. Look for and click on the **Print labels** button.
4. Select label **Format** Tube/Bag and click Print.
5. **PDF** with QR Codes and ID-s is generated.
6. Scan QR Codes from **PlutoF GO** using **Collection/Sample ID** field.