

THE CATE2 USER MANUAL

Contents

1. Registering for CATE	page 2
2. Getting online with CATE and understanding the first screen	page 3
3. Using the CATE Species Records Module with the Filters	page 4
4. Using the CATE Species Totals Module with the Filters	page 5
5. Creating an Important Fungus Areas Profile	page 6
6. Understanding CATE mapping	page 7
7. Using CATE to create your personal site map	page 8
8. Getting started with Online Recording	page 8
9. Populating your personal files	page 9
10. Adding records	page 10
11. Saving and submitting your records	page 11

Please note: when accessing CATE online it is strongly advised that you use the Mozilla Firefox browser. This is easily downloadable, is free, safe, and is now the browser of choice in much of Europe. Firefox will rest happily on your Desktop alongside other browsers. Experience has shown that accessing CATE through some browsers including most notably Internet Explorer is likely to throw up various aberrations in the visual display that detract from its effectiveness.

[Note: If you have already obtained login access to CATE1 you will still need to have the login re-activated before you can use it to access CATE2].

The following CATE2 user manual is as comprehensive as we have been able to make it, and some parts you may want to skip over. If we have missed anything, or not explained sections clearly enough, please let us know.

1. Registering for CATE

Not everyone can see the more sensitive data on the CATE database, including place names and grid references more precise than 1 hectad. To do this you must be a registered user.

How do I become a registered user?

Application must be made to the ABFG (Michael Jordan) either by 'phone, letter or email. You will then receive a username and password, so long as you qualify for access.

Who can qualify?

In order to qualify for CATE registration you must either be a recorder, a representative of a local record centre, or be a member of another recognised agency, delivering reasonable quantities of records to CATE.

Alternatively you must be a member of a recognised agency or university with a bona fide need to access data.

What other restrictions are there?

Before obtaining registered access, you will need to accept the terms, and sign a Standard Disclosure Agreement. This allows you to copy and distribute any data that has been provided under your authority, but you may not copy or distribute any other data that appears on the database, without written permission.

You may not disclose or transfer your login details to any other person. These are for your exclusive use.

2. Getting Online with CATE

[Note: You are strongly recommended to view and work with CATE2 on the Internet using the Mozilla Firefox browser. It is freely available as a download to your PC or Mac, will operate beside other browsers on your Desktop, and is entirely safe. It is now the most frequently used browser throughout most of Europe, and provides superior function with all the CATE modules]

- Go onto the Internet
- Go either to the direct URL: <http://cate.abfg.org>, or via the CATE button on the main Home page of the ABFG website: <http://www.abfg.org>
- Select 'login'
- Enter your username and password. Sign In
- Don't forget to log out when you have finished

What do the headings mean?

- Above the black top bar, you will see 3 headings: CATE Species Records, Online Recorder, Logout. By hovering the cursor over 'CATE Species Records' will reveal a drop-down also including 'CATE Species Totals' and 'CATE Species Mapping'. Each of these will take you into a separate module of CATE analysis. Moving right to 'Online Recorder' reveals a drop down, totalling 8 options. We'll come to these later.
- Below the black bar 'CATE Species Records' is repeated in a broad blue bar, and below it, the most recent page of 30 records shows, excluding some details like Notes. In the centre of the blue bar are 2 buttons 'Filters' and 'Reset'. The Filters button is the gateway to the main search engine of CATE.
- The blue coloured headings beneath can be selected to prioritise the sort order of data. They may also have little up and down arrows beside them. These can be used to reverse the ascending or descending order within a given column. [Note: it is recommended that you do not use these functions without first running a filter, which will be explained in due course]
- At the far right hand edge of the page (which may need scrolling to reach if you do not have widescreen) is a column of blue buttons marked 'Show'. Clicking on a 'Show' button highlights the row in yellow and opens a new page, headed 'View Records' and exclusive to that record, including all its details. To return to the main data set, select the blue button with a left facing arrow, marked 'CATE2 Records'.
- At the bottom of the page (centre) is the current page number in a white box, followed by the total number of pages in blue. To move 1 page up or down use the inner arrows. To move to the first or last page, use the outer arrows. To progress to a specific page number, enter the page number in the white box and click any blank space on the bar, i.e. not on one of the arrows.
- To return to page 1, click the far left hand arrow
- At the bottom of the page (far right) is the current total of records on the database.

3. Opening and using the Filters panel with the CATE Species Records module.

Using the Filters will take you into functions that you may not be familiar with from other databases. So it's worth spending a while exploring them to discover what they will do for you. You cannot damage the system. If you do something that CATE really does not like, she will give a brown coloured 'Oops' warning page, and you may then have to come out of CATE and go back in again via your browser.

Select Filters. It will open a panel, headed 'Filters'. You will see a set of boxes. You can fill as many, or as few of these as you choose, depending on the nature of your query. We'll take something simple: the national CATE records for *Lactarius blennius*.

- Start to type 'Lactarius' into the first box. After the first 3 or 4 letters you may see a little cogwheel rotating at the right side of the box. It is searching for options. When it has found them it will reveal a drop down. Use its scrolling bar to come down the list to *Lactarius blennius* and use the cursor to highlight this name in dark blue. Single click it. Now drop down to the Total results box and using its drop down arrow, select '100 records'. This is the number of records that will show on each page. Click the bottom right Filter button. At the bottom right of your screen, you may see green blocks showing the progress.
- The screen will then change to a familiar 'CATE2 Species Records' display but now filtered to show only the records for the species you want. You can A-Z sort any of the columns that are in blue by clicking on the title of the column. If you then use the little up and down arrows, they will reverse the order of that column i.e. from Z-A.
- Note that the default arrangement of ID numbers in the far left hand column 'ABFGID' is normally set highest to lowest. You can reverse this using the arrows, but the column will always revert to the default ordering when you leave the Filter panel. Note if you have already sorted another column A-Z, this will affect the default ordering of ABFGID.
- Now using the top centre buttons, either go back to the 'Filters' panel, or if you want to return to the main dataset, select 'Reset'. This time we'll go back to the Filters panel. You will see that the species we selected is still showing, so we'll filter more precisely.
- Select a Place. We'll use a National Trust place name, so in the Place box start to type 'NatTrust' (upper and lower case – no spaces - the way that all NT properties are prefixed on CATE). If you have already entered e.g. NT place names for a query, another drop down may appear with up to 8 of your most recently queried NT sites. Either select one from drop down, or continue typing if you can't see the one you want.
- However, for the purpose of this introduction, we'll go for NatTrust Knightshayes Court. Typing in 'NatTrust Knightshayes' will probably be enough. Running the filter this time will reveal a limited number of records meeting the criteria of our refined query.
- To refine it still further, go back to the Filter panel and add a date range using the Date down arrows. Clicking the little red calendar logo will offer you the current month. For this exercise put in 01 January 2009 to 31st December 2009. Filter again. Now just the records for that NT site in 2009 will show. To go back to the main dataset click Reset.

4. Opening and using the Filters panel with the CATE Species Totals module

- Using the 'CATE Species Records' drop down above the black bar, select 'CATE Species Totals'. The familiar dataset will disappear, and apart from the header bars, you will see a blank screen.
- Select Filters. This time you will see a more elaborate range of boxes in the Filters Panel.
- We'll start with a very basic Totals search – of the whole database!
- At the top, the Primary Field, by default, is set to Species Name. Don't alter it. Also leave the Order Field in its default mode 'Primary Field by Total'
- Leave the Order Order in its 'Descending' default mode – this will bring the species with the most records to the top of the list and those with the least to the bottom. Change 'Total Results' to 100 records. Leave the Species Name box (below) ticked.
- Click Filter at the bottom of the panel (you may need to scroll the main page down to reach this)
- You will see the progress of the query in the green blocks at bottom right if you are using Firefox.
- The screen will change to reveal a list in order of frequency of recording, commencing with *Hypholoma fasciculare*, the most commonly recorded species. Across to the right, you will also see the earliest and latest dates on CATE of records for the species.
- For the moment ignore the advice, top left, about clicking grey squares – we'll do this next.
- Go back to Filters and this time tick the small lower set of boxes beside Associated Organism, Medium, and Placename, set to the right of 'Columns'. Click Popup Totals at the bottom of the panel.
- Run the filter.
- When the CATE2 Totals screen appears again and has completed its data transfer, which can take a few seconds, you will find that running the cursor over the numbers in e.g. the Assoc Org column will highlight each cell over which the cursor rests, in dark grey.
- Left click the mouse. If you are on a cell in the Assoc Org column, the full breakdown of results for that species will appear as a dark grey overlay panel with white text. You can clear the panel by clicking anywhere in the Primary Field column.

You will need to play with this module yourself, changing priorities and filling different boxes to discover its full potential.

5. Creating an Important Fungus Areas profile in CATE Species Totals

The filter modules in CATE2 are, as indicated already, extremely versatile. There is not a great deal that cannot be analysed with the system, and as indicated you will need to experiment to discover all that can be achieved.

One of the more valuable functions is the capacity to create an Important Fungus Areas 'map', a facility that has not been available hitherto in mycological databases. It operates through the CATE Species Totals module, in conjunction with CATE Species Mapping (see later). The guidance below assumes that you have already familiarised yourself in the previous section with the workings of the Species Totals module.

- Using the drop down above the black bar, select 'CATE Species Totals'. The familiar dataset will disappear, and apart from the header bars, you will again see a blank screen.
- Select Filters. You will see the more elaborate range of boxes in the Filters Panel.
- In the first box, using the Primary Field dropdown, change the primary field to Place-name.
- In the Vice County box enter the Vice County for which you want to develop an IFA profile. Remember that you must type in a few letters, wait for the dark blue drop down to appear, and click on this.
- For the purpose of this exercise we'll put in Pembrokeshire, so type the first few letters, and then click the 'VC45 – Pembrokeshire' drop down.
- Now tick the small boxes for Species Name, Ecosystem, Placename, and Grid Ref.
- Set the Total results to 500 and make sure that Descending Order is selected.
- Tick the Popup totals box.
- Run the filter.

The result of your query will emerge after some moments, with a column of Placenames in descending order relative to the numbers of species recorded in each. You can watch its progress, if using Firefox, with the green blocks at the bottom right of your screen.

Across from left to right you will see, the total number of records delivered for that location, the number of species recorded there, the first and last dates of records, the range of ecosystems in the location, and any varying grid references. Using the mouse over cells which provide Popups, you can again expand the totals into dark grey analysis boxes.

6. CATE Species Mapping

- Above the black top bar, select 'CATE Species Mapping' from the drop down of 'CATE Species Records'. The familiar dataset will disappear, and apart from the header bars, you will again see a blank screen.
- Select Filters. You will see a range of boxes in the Filters Panel.
- Enter as an exercise *Lactarius blennius* in the top Species box (remember to let it populate and then click on the dark blue dropdown)
- In the Vice county box, we'll use the southern part of Devon for our exercise, so start to type in 'Devon' and click the resulting drop down, making sure that you select 'Devon (south)'
- Set the mapping resolution to '1km squares' using the drop down arrow.
- Run the filter

The map tile that appears will show of as much of the UK as fits onto your screen. Hold down the left click of the mouse and drag the map up so that the southwestern peninsula of the UK is visible.

You will now see a cluster of pins, most of which are coloured red but at least one of which, towards the top of the cluster is purple. The colour of the pins indicates numbers recorded at that location and to understand the colour coding, you will need to study the 'Map Colours' at the right of the main map.

- If you have a scrolling wheel on your mouse, you can use it to zoom in or out on the map.
- Keeping the pins cluster on screen, progressively zoom in. If the position of the pins starts to become 'lost' on the map you change their size from 'Number Coloured markers' to 'X large plain markers' using the right hand map panel marked 'Map Markers'.
- When you have zoomed in far enough you will see that the site with the purple pin is a National Trust property: Knightshayes Court, just north of Tiverton.
- Click on it and a popup will emerge revealing that there are currently 25 records for *Lactarius blennius* at the location.
- Go back to the top of the map and select 'Reset' and then 'Filters' again.
- Do not enter a species name this time, but re-enter Devon (south) and again set the mapping resolution to 1km squares. This time also click the popup totals box at the bottom of the panel.
- Filter. This time the map will indicate all records for Devon (south) and as you zoom in, you will note that the pin colour for Knightshayes Court is no longer purple but pale blue/green.
- Now click on the blue/green pin. It will show the overall number of records and the species details that have been entered onto CATE for Knightshayes Court.

7. Using CATE to create a map your personal foray recording

As with the other modules changing the Columns preferences and filling different boxes will change the nature of the results that you obtain. If for example, you have records of your own on CATE you can use the system to create your own profile.

- Above the black top bar, select 'CATE Species Mapping' from the drop down of 'CATE Species Records'. The familiar dataset will disappear, and apart from the header bars, you will again see a blank screen.
- Select Filters. You will see a range of boxes in the Filters Panel.
- Enter your own name in either Collector or Recorder box. Make sure that you are entering your name in the way in which it appears on the dataset. You can use part of your name e.g. your surname as a 'fuzzy search' but if it happens to be 'Smith' you may get an awful lot of results!
- Set the mapping resolution to '1km, 100m or 10m squares' using the drop down arrow.
- Tick the Popups box.
- Run the filter

The mapping will present all locations in the UK where you have forayed over the years and submitted records, either directly or indirectly through another recorder to CATE, with pinpoints.

- Zoom in using the mouse (see CATE Species mapping).
- Click on a selected pin. It will expand to present a list of the species that you have recorded at that location, plus the number of records of the species.
- To return to the mapping a start another search, select 'Reset' and the 'Filter'.

[Note our license with Open Space allows a maximum number of tiles to be used in 24 hours, so please do not over-use the mapping and always remember to log out when you have finished.]

8. Getting started with Online Recording

One of the keys to the successful operation of any 'inter-relational' database, one that will perform quite complex analysis of the data, lies with standardisation of terminology – the elimination of the '21 ways of recording a fallen twig' syndrome.

Records that come in on Excel or Access spreadsheets are more often than not littered with inconsistencies, all of which have to be corrected before data can be uploaded. This is a time-consuming process, the need for which is wholly eradicated in the CATE Online Recorder module.

Nothing in this module, other than Notes, will register for 'Save' if it is simply typed into a box. The only way in which data will be accepted at 'Save' is if the appropriate box entry has been selected from its drop down list.

Most of these lists are already pre-loaded into the system, and are updated on a regular basis, but one or two personal lists must be set up by you before you start entering records. These 'bespoke' lists include 'My Places', 'My Members', and 'My Recorders'. It's very easy to set them up and when you have learned how, it will be no problem for you to go back and add to them, as required.

9. Populating My Places, My Members and My Recorders

Login. You will need to be ready with details of your foray locations, including place names, grid references to at least 1km resolution e.g. ST4056, and if appropriate a 6-figure 100m resolution, and altitudes. The easiest way to obtain these is by using the online Ordnance Survey 'Get A Map'.

<http://www.ordnancesurvey.co.uk/oswebsite/getamap/>

- Select Online Recorder in the top toolbar.
- From the drop down list select 'View My Places'. To start with this part of the module will be empty, because as yet you have entered none of your local foray sites.
- Above the blue bar indicating 'My Places List' you will see a button marked 'Actions'. Click this and then click the '+ New' box that will appear.
- Fill the 3 boxes. Note that grid references must be entered as ST4056 or ST403567 in upper case and with no spaces. So variants like. 'st403 567' are not in an acceptable format.
- When you have filled the 3 boxes, click 'Save' or 'Save and Add' if you want to add another place.
- When you have finished adding places, click the 'Back to List' box and you will see that the page is no longer blank, but includes a list of the place details that you have populated. This list now becomes available in Add a Record, as you will see when you start to generate records.

Note: place names must be straightforward and simple, with the principle place set before the secondary place, e.g. a correct place name would be 'Bristol, Ashton Court', not 'Ashton Court, Bristol'. Place names must exclude secondary details e.g. 'Ashton Court, beside the main drive' is not acceptable because 'beside the main drive' can be separately registered in ecosystems, and can be also entered in the Notes.

National Trust properties must be prefaced with 'NatTrust', MOD properties with 'MOD-Estates' and FC properties with 'ForComm'.

- Go back to the Online Recorder dropdown and repeat the above process to populate the bespoke files for 'View My Members' and 'View My Recorders'. In CATE2 incidentally the term 'Members' includes anyone who is likely to appear in the dataset column for Collector or Determiner. 'Recorders' is limited to you or to any other persons who may take over the job of recording your data.

Note: when you enter names of people they must preferably include a first name and a surname, not initials as any abbreviation can cause confusion when running analyses. Please do not incorporate professional titles such as 'Dr.' or 'Prof.'

When you finish each of these, click 'Back to List'

- Lastly, go to 'View My Datasets' in the Online Recorder dropdown.
- Select 'Actions' and '+New'. Note that 'Choose an Action' (bottom left) is only to allow you to delete.
- Give a name to the dataset you are about to create e.g. 'Dorset FG, Sept. 2011'. You can create and name as many datasets here as you wish.
- For the moment ignore the Status and Hide messages. You need do nothing for the moment.
- Select 'Save' (either the top or bottom – both are the same)
- Select 'Back to List'

10. Adding Records

Once you have populated the 'bespoke' files, you are ready to start generating online records. Most of the detailed guidance below is 'common sense' but it has been made as thorough as possible to avoid confusion when you first start recording. ONCE FAMILIAR WITH THE SYSTEM, ENTERING A RECORD TAKES 30 SECONDS FROM START TO FINISH.

Select Add a Record from Online Recorder dropdown. On the left of the new screen you will see a blue panel in 4 sections marked: 'Species Data', 'Location Data', 'People and Groups', 'Add a Note'. To the right of this are the boxes to fill for the first 'Species Data' section.

Notice that each box includes a small tick box on the left. If you leave this box empty, the box will clear of whatever you have entered once you have Saved that record, and it will be empty for the start of the next record. If you tick it, however, it will remain populated. So for example, if you are in a wood that solely made up of beech trees and you don't want to have to re-enter *Fagus* sp. for each new record under Assoc Org, tick the box. You can un-tick it at any time. Remember that in every box aside from Notes, a drop down selection must be clicked in order for that entry to register. Simply typing in will not Save. So, let's begin.

- If you know the current preferred name of the species you want to enter, start to type it into the Species Box and then click the drop down name.
- Now double click the name that has appeared automatically in the Synonym box, and again click the appropriate drop down synonym. If you don't do this, the synonym will not register when you come to Save.
- If you don't know the current preferred name of a species, start typing in the name you do know in the Synonym box, and the current preferred name will appear in brackets for you to enter into the top box. [Note: the brackets won't appear subsequently in your records].
- Fill the other Species Data boxes using either the drop down arrows or typing in part of a word. All Associated Organisms must be entered in Latin binomials. English names of trees etc. will not be accepted.
- Move to the Location Data boxes by selecting 'Location Data' from the left hand menu. Fill these in similar manner. The top Dataset box will probably already be populated with the last Dataset that you created. Make sure, however, that you select the correct dataset from the drop down.
- The appropriate date can be selected by clicking the little red calendar, or by using the drop down arrows.
- Ecosystem and Place must be filled using the drop downs. If your foray location does not appear, it means you have not yet entered it in 'View My Places'
- Complete the Vice County box by starting to type in the name or number of the VC and selecting from the drop down.
- Tick each of these boxes because you will probably be using the same details for the next record.
- Move to the People and Groups section. Each recognised UK group is already pre-loaded so just start to type in the group name, if group is appropriate to the record. If a group was not involved leave this box blank.
- Fill the Collector, Determiner, Recorder boxes by typing in the first few letters. If the name doesn't appear, you haven't yet entered it in 'View My Members' or 'View My Recorders'
- Finally add any brief notes in 'Add a Note'

11. Saving and submitting your records

After each record select 'Save and Add' at the right hand of the screen (you can use either the top or bottom buttons), and when you come to the final record you want to enter, select 'Save'.

Each time you enter a record, the most recent 10 records will appear in the lower section of the New Online Recorder screen.

You can view all your records by going to 'View My Datasets' in the Online Recorder drop down of the main screen. Select the set you want to examine by ticking the left hand box. The row of that set will turn yellow. Now select 'Open' from the right hand end of the row. When a set is finally ready to submit for upload, go to 'View My Datasets' and highlight it by ticking the left hand box, select 'Submit' from the lower blue 'Choose an Action' button, and then select 'Go'. The Status column will now change from 'New' to 'Pending'.

From this juncture you may not change any records that have been submitted, although under exceptional circumstances they can be recalled. Pending records are checked daily in Administration and within 24 hours or less you should see the Status column change again, from 'Pending' to 'Active'. This means the records have been transferred to the main dataset.