

## **Biotics 4 Tracker Training for Heritage Installations**

Four training sessions will be provided by NatureServe staff to HP/CDC staff shortly after the installation of Biotics 4. The goal of the sessions is to familiarize staff with the basic features of the software and major differences between Tracker and the system it replaces. The training will take place via a conference call and demonstration viewable over a web conferencing tool (Webex), and supporting documentation will also be provided (the Biotics 4 Getting Started Guide). This course is not intended as a substitution for Core Heritage Methodology training.

### Session 1 (for all users):

- An overview of the mechanics of using Tracker, focusing on record types (“subject areas”), menu options, field types, the Find windows, working lists, and navigation between data records.

### Session 2 (for all users):

- Common data management tasks and workflows: record creation, record copy, and reassigning EOs to a different element; methodology behind some new record types and fields
- Use of the Query Builder tool.

### Session 3 (for Administrators):

- An overview of the functions controlled through the Administrator tool.

### Session 4 (for all users):

- An introduction to the Biotics data model and basic SQL for building queries.

*In preparation for the training, the HP/CDC staff should arrange for one computer to be used to connect to the WebEx demo, preferably with the screen image projected for all trainees to see. Ten minutes prior to the training session, someone from the program should dial into a conference call and then connect to the demonstration. Phone number and log-in information will be provided to each participating program by email.*