DBG Specimen Data Batch Upload Protocol

Step 1: Review and Revise Data Set

- Locate and identify the dataset that is to be uploaded. This is most often a spreadsheet or completed version of the *Data Recording for Herbarium Specimens* form
- Save the dataset document with the format YYYYMMDD_Collector'sFirstInitialLastName
- Place it here: Q:\Research\Data_Management\DBG\DBG_MycoPortal_BatchUpload
- Open the dataset and evaluate the data. Check that records conform to accepted standards and controlled vocabularies
- Once revisions and review is complete, save the dataset as a CSV here: Q:\Research\Data_Management\DBG\DBG_MycoPortal_BatchUpload

Field	Description
recordedBy	The first listed collector ONLY. If no collector, record as "unknown". Record full first, middle, and last name when possible (in that order). No commas. Place a space between initials (A. B. Smith, rather than A.B. Smith).
recordNumber	The collector number (may include letters as well). If no number, record as "s.n.".
eventDate	The date the specimen was collected. Unknown month or days should be recorded as "00". If no date, leave this field blank and record "collection date unknown." in the Verbatim Date field.
associatedCollectors	Additional collectors (full first and last names, when possible) separated by a semicolon ";". Do not put determiner in this field.
scientificName	Latin binomials along with var. or ssp. are included here
locality	Information about the location in which the specimen was collected. Include Municipality information in this field. Also include 7½' Quads if applicable. Follow the entry with a "." Think of this field as the information used to find the exact location again.
county	Record county name only. Do not include "county".
stateProvince	State name
country	"USA"
decimalLatitude	latitude
decimalLongitude	Be sure that value is negative "-" when appropriate.
datum	WGS84, NAD23
habitat	Description of the habitat in which species was collected, including slope, aspect, and common names of associated taxa. Follow the entry with a "."
substrate	Soil type, eyxc
associatedTaxa	List of latin binomials. Common names of plants go in habitat.
dynamicProperties	Measurable characteristics
verbatimElevation	Elevation measured in feet
minimumElevation	Elevation measured in meters
processingStatus	Data uploaded directly to SEInet will be recorded as Unprocessed/NLP
identifiedBy	If applicable record the name only (do not include "det.")
dateIndentified	If applicable record the date (DD/MM/YYYY)
fieldNumber	If applicable, record the permit number under which the specimen was collected.

Step 2: Initiate Data Upload

- Log into MycoPortal
- Navigate to the Collection Management Control Panel and select *Import/Update Specimen Records*
- Select *General File Upload* and click *Initialize Upload*
- Select *Choose File* and browse to the CSV version of the dataset that you would like to upload
- Once the file has been selected, click *Analyze File*

Step 3: Analyze File and Map Data Fields

Data Upload Module

Denver Botanic Garden, Sam Mitchel Herbarium of Fungi
Last Upload Date: 14 March 2017 12:00:00

General File Upload

Source Field	Target Field
recordedby	recordedby ▼
redordnumber	Select Target Field ▼
eventdate	eventdate ▼
associatedcollectors	associatedcollectors ▼
scientificname	scientificname ▼
stateprovince	stateprovince ▼
county	county ▼
locality	locality ▼
geodeticdatum	Select Target Field ▼
decimallatitude	Select Target Field ▼
decimallongitude	Select Target Field ▼
verbatimelevation	Select Target Field ▼
substrate	Select Target Field ▼
associatedtaxa	Select Target Field ▼
reproductivecondition	reproductivecondition ▼
habitat	habitat ▼

* Mappings that are not yet saved are displayed in Yellow
* To learn more about mapping to Symbiota fields (and Darwin Core):
   SymbiotaOccurrenceFields.pdf
   Loading Data into Symbiota

[Delete Field Mapping] [Save Mapping] [Automap Fields]

☑ Match on Catalog Number
☐ Match on Other Catalog Numbers

- **Caution:** Matching records will be replaced with incoming records
- If both checkboxes are selected, matches will first be made on catalog numbers and secondarily on other catalog numbers

☐ Verify image links

[Start Upload]

- The upload process may take a while, DO NOT CLOSE YOUR BROWSER
- Once the upload process is complete, query for the records and verify they were all uploaded correctly and successfully
- Move the uploaded CSV version of the dataset here:
  Q:\Research\Data_Management\DBG\DBG_MycoPortal_BatchUpload\UploadedDatasets