

SERNEC – TCN Skeletal Data Entry Draft – 9 April 2015

Introduction:

The intent of this document is to give an overview of the functionality of the skeletal data entry form in Symbiota. This form should be used to create a partial (skeletal) record that relates to a specimen image where no existing metadata record already exists.

If you are trying to link new images with records that were previously entered prior to the assignment of barcodes, please contact Michael and Herrick to discuss your specific set of circumstances. There are a few ways to achieve this in Symbiota, which will depend on the variable that you are using to link the metadata record and the image.

The skeletal data interface can be found by going to **My Profile** and then looking in the **Collection Management** main menu (under Specimen Management tab) and select your collection. On the following page in the **Data Editor Control Panel**, select **Add Skeletal Records**. If you do not find your collection listed under the Specimen Management tab, contact Michael or Herrick to make sure you have the correct permissions.

The fields that show up in the interface will default to show the fields that should be filled in for the SERNEC – TCN with one exception. The one exception is the Language field, which is covered below. There is a button next to the words **Skeletal Data**, which can be used to select additional fields, but we do not expect these to be used for the majority of SERNEC – TCN users. The only field that is required for a skeletal record to be created is the **Catalog Number** field (the barcode value for the SERNEC - TCN). With that said, we strongly encourage you to fill in all the fields that show up in the default form.

Fields To Be Filled In:

The following fields are visible by default. Note that most of these fields have an auto-fill option. Simply hit tab or enter on your keyboard to make a selection.

Scientific Name

This is the name that the specimen is filed as, typically as an entire folder. It is not anticipated that each individual specimen determination will be entered into this field.

The following functionality is to be expected:

The authorship (unlabeled field to the right of Scientific Name) and **Family** field will be automatically filled in based on the name entered. Using the pick list can minimize time needed for typing and reduce keystroke errors.

If a **Scientific Name** entry is not found by the system it will be saved and remain as is in the skeletal record. Changing the authorship for a name is allowed. In both these cases, the name will only be changed within your record and will have no effect on the main taxonomy tree in Symbiota. You may wish to have these records reviewed by the Curator. See the description of Processing Status below for a way to flag a record for later review.

Protect locality details from general public

This box will be automatically filled in based on the taxon that is entered from the protected species tables in Symbiota. It can also be manually checked or unchecked for any record. The

system checks two places to see if a record should be masked automatically. The first is the global protected list (found under Site map then Rare, Threatened and Endangered Species). The second is the state based list, which can be managed by each state lead. There are currently no state based rare species lists for SERNEC.

Any record with this option checked will have its locality information below county hidden from public users once this metadata has been populated. In addition, the specimen image with label for these records will also be hidden from public view.

State/Province

This is the state where the specimen was collected. It should be spelled out in full (not abbreviated). Note that it will be auto filled as you type. The Country is will be filled in automatically using the state value within the geographic lookup tables.

County/Parish

This is the county (or parish) where the specimen was collected. Note that it will be auto filled as you type and will be constrained based on the state that was previously entered. You should select just the county name without the word "County" included.

Catalog Number

For the SERNEC – TCN this is the barcode value for the specimen. This value must be unique within your collection. Duplicate Catalog Numbers are not allowed and a warning box will pop up if this occurs.

Once you hit the enter key in this field, the new skeletal record will be created. The record name will appear in a list under **Record**. You should scan directly into this field with your barcode reader. Note that many barcode readers will automatically include a return when this is done and the record will be saved. The Catalog Number is the only required field so this field should be filled in last.

Add Record

This button is used to save a skeletal record. It has the same behavior as hitting the enter key when your cursor is on the Catalog Number field.

Clear Form

This button should be used to clear the entire form. If this button is not hit the fields within the form will stay the same.

Additional Notes and Features

Session Information

This is information about the records being recorded within a given session. This includes the length of the session (Session), the number of new records created (Count) and the number of records per hour (Rate). This information is not currently saved, but this feature is planned for future Symbiota releases.

Reviewing and Editing Records

You can click on the skeletal specimen record from list under Records to enter more data or review the record under the Occurrence Data tab. The skeletal record can also be edited here. There is an Image tab, where images can be linked one-by-one to your records however this is not the method being used by the SERNEC – TCN (see below for more details).

The following fields are hidden by default, but can be shown by clicking the tab next to Skeletal Data and selecting the corresponding checkbox.

Language

This is the language that the label is written in. It is expected that the vast majority of SERNEC – TCN labels are in English so this is set to the default. If you encounter labels in another language be sure to change the value in the drop down menu.

Processing Status

This field is used to designate specific workflows for individual collections. It is expected that most SERNEC specimen records will be left with the default value (Unprocessed). It can also be set to Expert Required if there is an issue that a technician wants to bring to the curators attention.

Image linkage

SERNEC – TCN image files (name based on barcode value) will be uploaded to the iPlant Discovery Environment. URLs will be automatically generated for each image and Symbiota will be set up to automatically harvest these URLs and populate the database with these values. There will therefore be no need to manually link images to the skeletal records in Symbiota.

Additional Resources

The following webinar gives an overview of the skeletal data entry form in video format. Note that it covers some features that are not part of the SERNEC – TCN workflow, but is a helpful resource for someone new to the tool.

<http://idigbio.adobeconnect.com/p67q2zhf5pb/>