Guidelines for Data Entry in the registry of U.S. Federal Scientific Collections (USFSC)

Welcome to the [U.S. Federal Scientific Collections Registry](http://usfsc.grscicoll.org/)! This online data portal is dependent on information contributed by the community and we appreciate your effort to register your collections.

The steps you need to get your staff members, collections and institutions entered into the registry are outlined below. Each US Department/Agency has evaluated the best way to assign collections and institutions within the hierarchy of the database, so please make sure you’ve consulted with your representative to ensure proper entry.

The main point of contact for agency questions is:

The main point of contact for data portal questions is: Eileen Graham, [scicoll@si.edu](mailto:scicoll@si.edu)

## Registry Record Search, Evaluation, and Entry

This document contains three sections:

1. SEARCH - this section explains how to search for records in the registry. Since many people from a single institution may be entering data, we recommend you start here to avoid creating duplicative records.
2. EVALUATION - before you start typing into a new record, we recommend you assess the collections you want to enter. This section gives you a few detailed definitions and guidance for the difference between “collections” and “institutions”.
3. ENTRY - this section lays out the mandatory data needed to successfully create each type of record: “institution”, “collection”, and “staff member”.

### SEARCH

If you are new to the registry, we ask that you search records you intend to enter first to ensure your institution, collection, and/or staff members have not already been included and avoid duplicative entries. There are several reasons why they may already be part of the database and records that are already present can be easily modified or updated.

If you cannot find the record you’re searching for, you will need to create a record. Those instructions are below in the ENTRY section.

If you did find the record you were interested in - great!  Please check the record for accuracy. If you find the records is inaccurate or out-of-date, please contact us and/or the person listed as the Primary Contact to determine the best course of action. If you have the needed information to update the record on the spot, you can do this using the “Edit Record” button that appears on the top of the page. Please note, all edits will be published after being approved through the moderation process described in the ENTRY section.

Search: for your [INSTITUTION](http://grscicoll.org/find-institutions), your [COLLECTION](http://grscicoll.org/find-institutional-collections-1), and your [STAFF MEMBER](http://grscicoll.org/find-staff-members-updated) in the current listings.

### EVALUATION

After you’ve determined if any of your collections, institutions or staff members are already recorded, you need to decide how to enter them into the system. As part of the work conducted by the Interagency Working Group on Scientific Collections (IWGSC), each department and agency has evaluated the best method for naming conventions and, in some cases, what constitutes an “Institution”. See [these guidelines](https://drive.google.com/file/d/0B7PszphnmSvySTJBNzZoMWczeVk/view?usp=sharing) more information.

To help you decide what should be entered at each level, here are a few definitions that we commonly use:

* Collections are groups of specimens or samples linked by some commonality.
  + Groups of specimens/samples/subcollections that have a unique numbering system. Example: specimens are labeled with “Fish 123”, “Mammal 123”, etc.
  + Groups of specimens/samples/subcollections that are managed by a single department. Example: specimens are labeled with “Invertebrate 123”, “Vertebrate 123”, etc.
  + Groups of specimens/samples/subcollections that are preserved in the same infrastructure. Example: specimens are all cryopreserved at the same facility.
  + Groups of specimens/samples/subcollections that were all collected from the same locality, region, private collector, etc.
* Collections are categorized as either “Institutional” or “Project” (denoted through the “Accession Status” entry field).
  + Institutional Collections are formally accessioned collections and are considered part of the institutional assets; they may receive institutional funds for curation.
  + Project Collections are commonly groups of specimens/samples that are not formally accessioned into the institution and do not receive institutional support for their curation. These may be collections from a single collecting event or those amassed by a single researcher. Project Collections often become Institutional Collections upon formal accessioning.
  + If you and/or your collection is not associated with an institution you may consider registering as a Personal Collection. Personal Collections are reserved for cases where collections are held privately and are governed entirely by the individual who oversees them.
* Institutions are entities that oversee and/or support collections. Institutions within your agency have likely been determined by the IWGSC. Please contact your representative if you are unsure how to utilize this data type.
  + There is no requirement for multiple collections under an institution - some institutions may only have one collection.
  + Several departments/agencies have already developed institutional records. If you are unsure where your collections should be catalogued, please contact your agency representative.
* Staff Members can be anyone affiliated with an institution and/or collection.
  + The Primary Contact for institutions is usually the registrar or director of collections. This can be any individual listed in the Staff Members table.
  + The Primary Contact for collections is usually the manager or head curator. This can be any individual listed in the Staff Members table.
  + Email notifications are sent to Primary Contacts for institutions and collections when changes are posted to their records.

### ENTRY

Once you’ve determined that your institution, collection, and/or staff member are not yet entered and how you want to represent your assets in the registry’s hierarchy, follow the steps below to ensure all records are input, approved and appropriately linked to each other.

Please note, all records have to be approved and published by the registry moderator before they become available. This process is usually quick, taking three to five days at the longest. Please wait until you receive publishing confirmation before creating the next record in the series.

1. To register a STAFF MEMBER, go to the “[Create a Staff Member](http://grscicoll.org/node/add/register-staff-member)” entry form and fill out as much detail as you can provide. You must be able to provide the following information to complete this process:
   1. Name
   2. Email
   3. City, Country

\*\*Note: If your institution has not been registered you will not be able to find it in the Primary Institution list (similarly for collections). Finish creating this record and then return once you’ve created your institution and/or collection records.

\*\*Note: Please wait until you receive publishing confirmation before creating institution and/or collection records that will need to be connected.

1. To register an INSTITUTION, go to the “[Create an Institution](http://grscicoll.org/node/add/register-biorepository)” entry form and fill out as much detail as you can provide. You must be able to provide the following information to complete this process:
   1. Institution Name - based on approved IWGSC nomenclature
   2. Institution Code - based on approved IWGSC nomenclature
   3. Institutional Governance
   4. City, Country
   5. Primary Contact - this is an autofill field pulling from the active records in the registry, if the contact person is already registered their name should appear.

\*\*Note: There is the ability to register a staff member while you complete this record. However, you will not be able to properly link the name of the institution and/or collection to that record until both have been approved by the moderator.

\*\*Note: Please wait until you receive publishing confirmation before creating collection and/or staff member records that need to be connected.

1. To register a COLLECTION, go to the “[Create a Collection](http://grscicoll.org/node/add/register-institution-collection)” entry form and fill out as much detail as you can provide. You must be able to provide the following information to complete this process:
   1. Institution Name - this is an autofill field pulling from the active records in the registry
   2. Collection Name
   3. Collection Code - based on approved IWGSC nomenclature
   4. Accession Status - this is a choice between Institutional and Project
      1. Institutional Collections are formally accessioned collections and are considered part of the institutional assets; they may receive institutional funds for curation.
      2. Project Collections are commonly groups of specimens/samples that are not formally accessioned into the institution and do not receive institutional support for their curation. These may be collections from a single collecting event or those amassed by a single researcher. Project Collections often become Institutional Collections upon formal accessioning.
   5. City, Country
   6. Primary Contact - this is an autofill field pulling from the active records in the registry, if you already registered the contact their name should appear.

\*\*Note: You must have a completed and published institutional record in order to complete a collection record.

\*\*Note: There is the ability to register a staff member while you complete this record. However, you will not be able to properly link the name of the institution and/or collection to that record until both have been approved by the moderator.

\*\*Note: Please wait until you receive publishing confirmation before creating staff member records that will need to be connected.