

Remote Databasing in Specify7

For UMMZ Insect Collection

SPECIFIC INSTRUCTIONS FOR ENTERING OUR DATA:

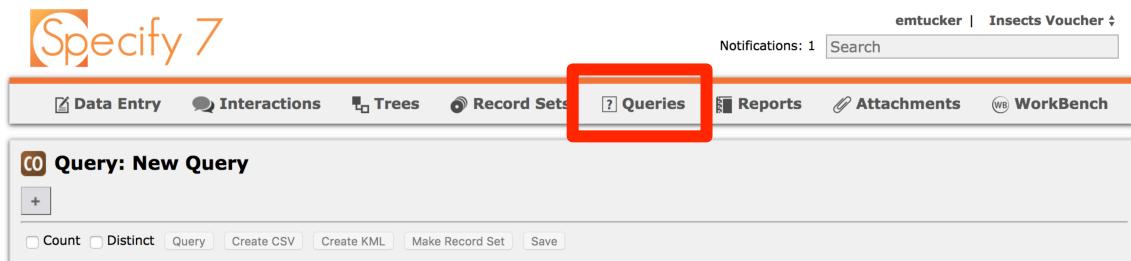
LET ME KNOW IF YOU HAVE ANY QUESTIONS!! It is much easier to enter it right the first time then to fix errors introduced!

Pick a group to work on transcribing:

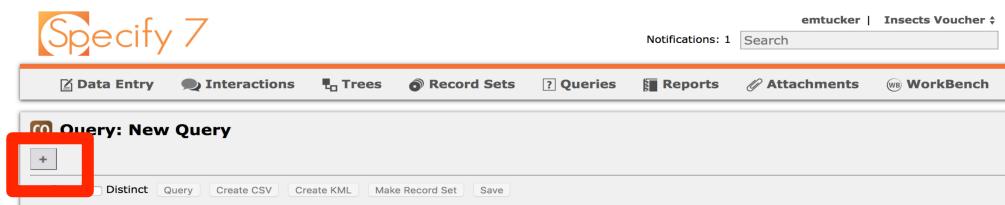
- Go to the shared Google Spreadsheet “**Remote Specimen Transcription TPT**”
- Pick a taxonomic group to work on and enter your name under “Assigned to” so that we don’t duplicate efforts

Create a query and record set for your group:

- Click “**Queries**” at the top of the page



- Click “**new**” when the pop up box asks
- Choose “**Collection Object**” for the type of query
- Click the “+” to add a field



- Select “**Catalog number**”, then select “=”
- Select “empty” from drop down options
- Then click not equal to “≠” button (so it only shows entries with catalog numbers)
- Click the “+” button again to add another line
- Add “**Determinations**” → “**Taxon**” → “**Family**” → Select “=” → enter your family name from the Google spreadsheet (alternatively this could be an order or genus if that is the group you choose – just enter order or genus instead of family under taxon above). There may be additional instructions for certain taxon groups in the spreadsheet.
- Add another line
- “**Cataloger**” → “**Last Name**” → “**Empty**” (this should make sure you don’t pull up any records already transcribed)
- Your finished query should look like this (except the family name will be different):

Specify 7

emtucker | Insects Voucher ▾

Notifications: 1 Search

Data Entry Interactions Trees Record Sets Queries Reports Attachments WorkBench

Query: New Query

Catalog Number Empty

Determinations Taxon Family = Listrophoridae

Cataloger Last Name Empty

+ Count Distinct Query Create CSV Create KML Make Record Set Save

Results: 419

- Click the "Save As" button at the bottom so you don't need to do this again except for changing the family name when you move to another group on the spreadsheet
- Give this query a name - I called mine "Mites to Transcribe", but you can name it anything you want.

Create a record set to work with:

- Click "Query" at the bottom of the page if you still have the query page up (this may take a little while depending on the number of records it finds)
 - o If you are no longer on the query page: Click the big "Queries" button on the top of the page, select the query you saved when it asks, then click the "Query" button on the bottom of the page
- Wait until the query finishes. There will be a long list of records and it will say "Results: #####"
- Click the "Make Record Set" button

Catalog Number (any)

Determinations Taxon Family = Chrysidae

Collection Object Attachments Attachment Original Filename Contains .jpg

Collecting Information Verbatim Date Empty

Collecting Information Start Date Empty

Collecting Information Locality Geography Continent Empty

+ Count Distinct Query Create CSV Create KML Make Record Set Abandon Changes Save Save As

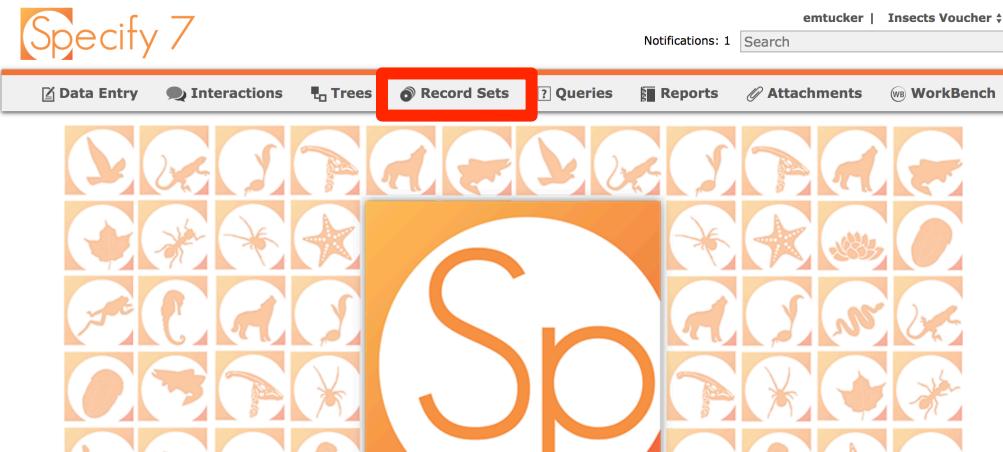
Catalog Number	Det. Family	Original Filename	Verbatim Date	Start Date	Loc.
UMMZI-105615	Chrysidae	\\\sa-museums.m.storage.umich.edu\sa-museums\ummz-insects\specify attachments\Reference Images\Hymenoptera\Chrysidae\UMMZ-INS-105615.JPG			
UMMZI-105616	Chrysidae	\\\sa-museums.m.storage.umich.edu\sa-museums\ummz-insects\specify attachments\Reference Images\Hymenoptera\Chrysidae\UMMZ-INS-105616.JPG			
UMMZI-105617	Chrysidae	\\\sa-museums.m.storage.umich.edu\sa-museums\ummz-insects\specify attachments\Reference Images\Hymenoptera\Chrysidae\UMMZ-INS-105617.JPG			
UMMZI-105618	Chrysidae	\\\sa-museums.m.storage.umich.edu\sa-museums\ummz-insects\specify attachments\Reference Images\Hymenoptera\Chrysidae\UMMZ-INS-105618.JPG			
UMMZI-105619	Chrysidae	\\\sa-museums.m.storage.umich.edu\sa-museums\ummz-insects\specify attachments\Reference Images\Hymenoptera\Chrysidae\UMMZ-INS-105619.JPG			

- Give this record set a name that is meaningful to you (maybe something like "Mite Family – Your Name", but it can be anything i.e. "dataset 1" etc.)

- Save
- When prompted, you can click “yes” if you are going to work on data transcription and entry now, or “no” if you want to work on data entry later.

Entering data from a record set:

- On the main Specify page click the “Record Sets” button at the top of the screen (skip this step if you clicked yes after creating the record set)



- Choose the record set you want to work on
- You should see a screen similar to this:
- Note the “new 1/366” at the top. This shows you how many records are in your record set and the “next” button allows you to navigate between records in your record set.

The screenshot shows the 'Collection Object' form in Specify 7. At the top right, it displays 'new 1/366 previous next'. The form contains fields for Catalog Number (UMMZI-105615), Accession, Alt Cat Number, Cataloger, Cataloged Date (Full Date MM/DD/YYYY), Project Number, and several checkboxes for status (on Loan, Do Not Publish, Sensitive). Below this is a 'Determinations (1)' section with fields for Taxon (Hymenoptera Chrysidae), Qualifier, Preferred Taxon (Hymenoptera Chrysidae), Name Usage, Determined Date, Determiner, Type Status, and Remarks. At the bottom is a 'Collecting Information' section with fields for Field Number, Method, and Curation status (CIP 0), along with Start Date and End Date fields.

- ***TIME SAVING NOTE*** If you are working on a very large dataset and already transcribed a bunch of records, you can go back to your saved query, re-query the data you want to work on, and create a new record set that will no longer include the records you already transcribed. This will save you clicking through many, many, pages of already transcribed records to get to the empty ones.

Data entry:

- The “cataloger” is you. Start to type in your last name and a dropdown menu should appear that contains your name (the more you type of your last name the more accurate the dropdown list of options becomes). You will not be able to save if you do not enter a cataloger.
- Enter “**NSF TCN: Terrestrial Parasite Tracker**” in the “**Project Number**” box (under the “Alt Catalog Number” near the top)
- Scroll to the bottom of the page where the image is

Host Link Relationship Type

Host ID Host Catalog No. Host Sex
 Host Class Host Order Host Family
 Host Genus Host Species Host Subspecies

Attachments

Collection Object Attachments (1) [Add](#) [Delete](#)

Modified By Agent: Tucker, Erika Modified Date: 03/24/2020 Generate Label on Save
Generate Label
GUID: 7ddae521-9947-4097-bf62-78a6ce78dc35

[Save](#) [Delete](#)

- Open the image in another window (either by right clicking or other means) and arrange the two Internet windows (one with image, one with data entry) next to each other so you can see both (or above and below). If you have multiple browser capable devices at home you could also put one image on your TV or iPad etc. while the data entry window is on your computer.

Prep Type	Prepared Date	Loan	Preparation Attachments	Count	Prepared By	Storage	Sample Number	Contact
Slide Mori	MM/DD/YYYY	<input type="checkbox"/>	0	1				

Col Obj Attribute Delete

Sex	<input type="button" value="▼"/>	Study Voucher	<input type="button" value="▼"/>	Stage	<input type="button" value="▼"/>
Genitalia No.		Tissue Sample		Sound Record	
Remarks	Imaged by: Madeleine Klemz				

Host Link	 <input type="text"/>	Relationship Type	<input type="button" value="▼"/>		
Host ID	<input type="text"/>	Host Catalog No.	<input type="text"/>	Host Sex	<input type="text"/>
Host Class	<input type="text"/>	Host Order	<input type="text"/>	Host Family	<input type="text"/>
Host Genus	<input type="text"/>	Host Species	<input type="text"/>	Host Subspecies	<input type="text"/>

Attachments

- Zoom in on the label data – you will need to be able to read this
- If your specimen has a UGA ###, BMOC ###, CKP ###, etc. (*not* the UMMZI- ####), this is the specimen “accession number” and there is likely already data in the database that you can copy and paste into this record.
 - o If your specimen has what looks like an accession number on it, create a Specify query in a new browser tab or window (don’t close your current window/tab)
 - o Go to “Query”, select “Collection Object” query, then add “Accession” → “Accession Number” → “=” and enter accession number on your specimen image.
 - o Click on any result (if there is one) and copy and paste information from the already entered record into the record you were starting to work on.
- If there is no corresponding accession number already in the database with information you can copy, proceed to enter all new data.
- **GOOGLE ALL TAXON NAMES AND LOCATIONS** before entering them in database to make sure you are spelling them correctly. Cut and paste is your friend!
 - o Check [VertNet](#) for the host information if there is something that looks like a “host catalog number” (see image below)
 - o Windows shortcut keys:
 - copy = “ctrl c”
 - paste = “ctrl v”
 - o Mac short cut keys:

- copy = “command c”
- paste = “command v”

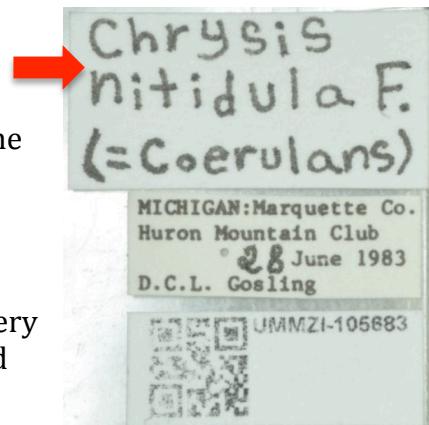


- Ask me and/or Barry if you have questions about anything on the specimen labels!
 - There is also a separate document Barry and I made with common label markings for our slides in the [shared Google drive](#) for this project:
 - [1. Label codes, terms, meanings, etc.](#)

More General Specify Information for UMMZ Insect Collection:

Determinations Section

- Start with Googling the taxonomic name and making sure the complete taxonomic name is in the database (this is actually a very bad example as the name copied from our unit trays is totally incorrect – Bombus balteatus is a type of bumble bee not a Chrysididae/cuckoo wasp)
- Do not change the taxonomic information in the database to a clearly incorrect taxon. If you Googled the name Bombus you would have found it is in the family Apidae, not Chrysididae (the family being used in this example)
- Chrysis nitidula is a type of Chrysididae
- The “F.” (or “Dahlbom” in the Bombus label) indicates the original authority. The person who very first discovered this is a new species and described it. This is different from the determiner. The determiner usually has something like “det. Tucker 2019” and indicates that Tucker identified the specimen (not described this as a new species).
- The “(=coerulans)” is indicating that another species (Chrysis coerulans) was synonymized under Chrysis nitidula. You do not need to worry about that right now.
- Now that you have checked the proper spelling and made sure the name does belong in the family Chrysididae, **search the taxon** name to see if it is in our database. The taxon names are in a hierarchical/tree type of table. In order for a species name to exist, first a genus needs to exist. In order for a genus to exist,



first a family needs to exist. And so on. The common hierachal levels are as follows (there are also may in-between level, but we'll start with these):

- **Order** - often ends in "ptera", although not always. Things like **Hymenoptera** or **Orthoptera**. Order name is always capitalized.
 - **Family** – always ends in "idae". Like Chrysidi**dae** or Apidae. Family name is always capitalized.
 - **Subfamily** – always ends in "inae".
 - **Genus** – has a variety of endings. Chrysis and Bombus are genus names in the above example. Always capitalized.
 - **Species** – variety of endings. Usually the gender of the name matches the genus gender if based on Latin or Greek words. NEVER CAPITALIZED. The name nitidula or balteatus in the above examples.
- There are two ways to look for a taxon name in the database
 - Click the magnifying glass button to search (do not use the pencil – this actually will change other records than the one you are working on)

Determinations (1) Add Delete

Taxon Hymenoptera Chrysidae

Qualifier

Preferred Taxon Hymenoptera Chrysidae

Determined Date Full Date MM/DD/YYYY

Determiner

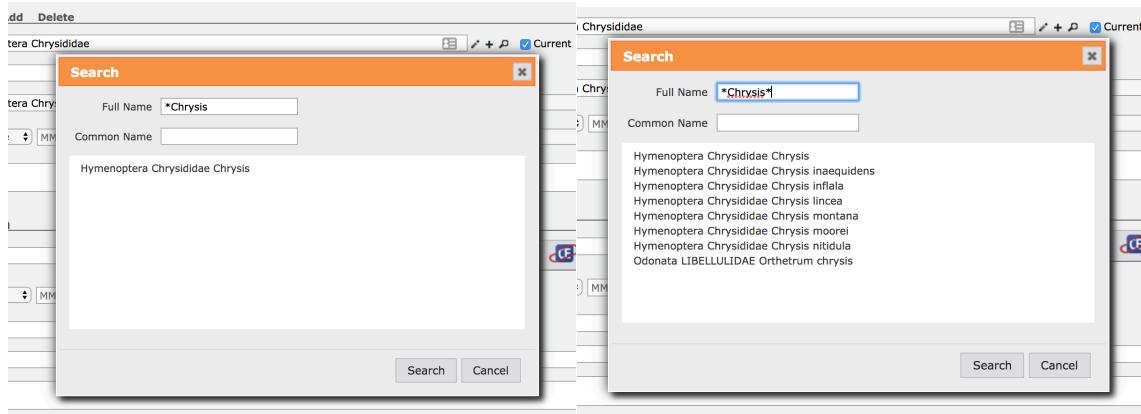
Name Usage

Type Status

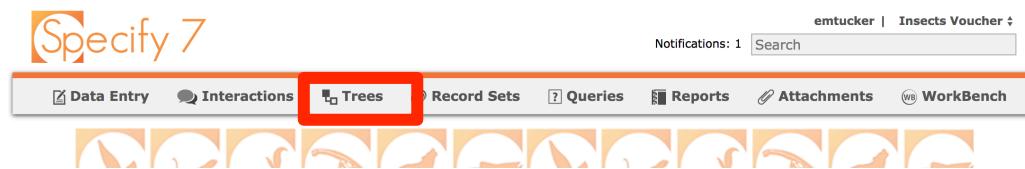
Remarks

Collecting Information

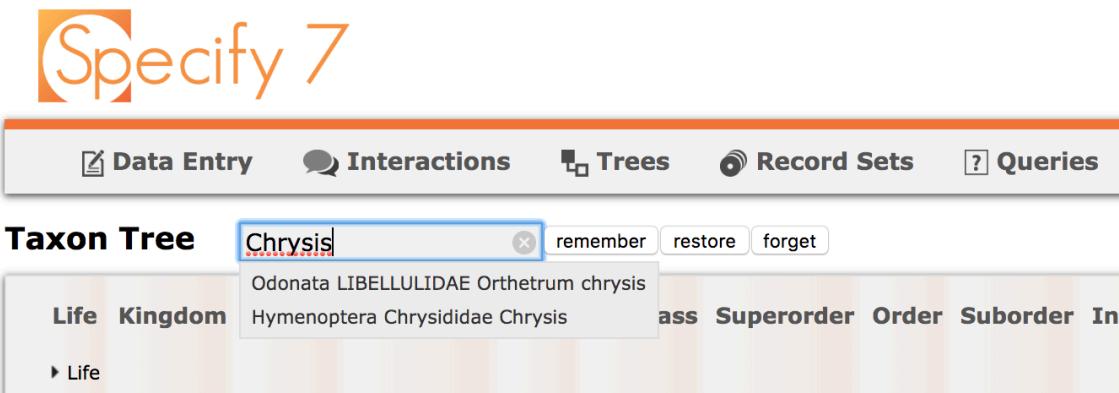
- In the search box that pops up add and "*" before the genus name so that you do not need to type out "Insecta Hymenoptera Chrysidae Chrysis". The asterisk acts as a wildcard and can be used before and/or after the name you are searching. Remember the species name won't be in the database unless the genus is already there.
- Searching with an asterisk in front vs in front and after brings up different results.



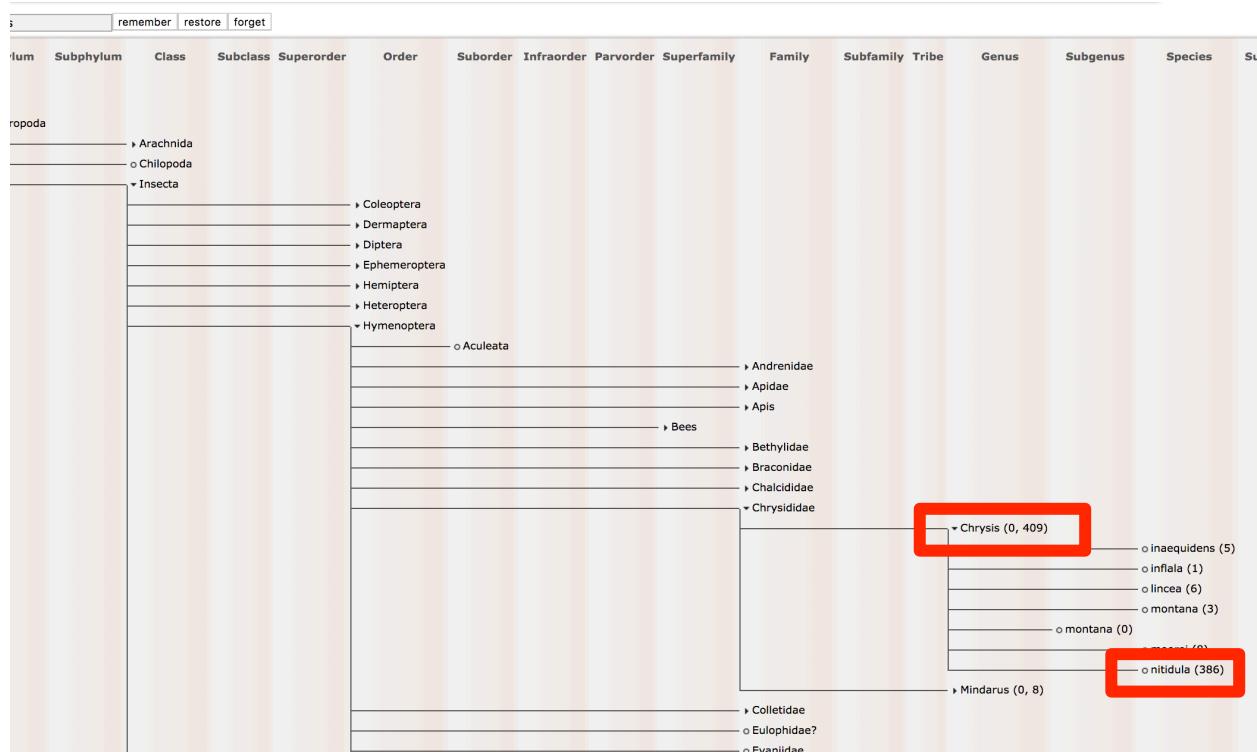
- If the species (or other taxonomic level) you need is on the list you can just click the one you want and it will auto fill the taxon box for you.
- If it is not on the list, you will need to add it. I find the easiest way to add new taxa (or geographic places when we get to that) is through the tree function in the database
- To search for a taxon in using the tree feature, open an other tab, go to specify, and click the “Trees” button at the top



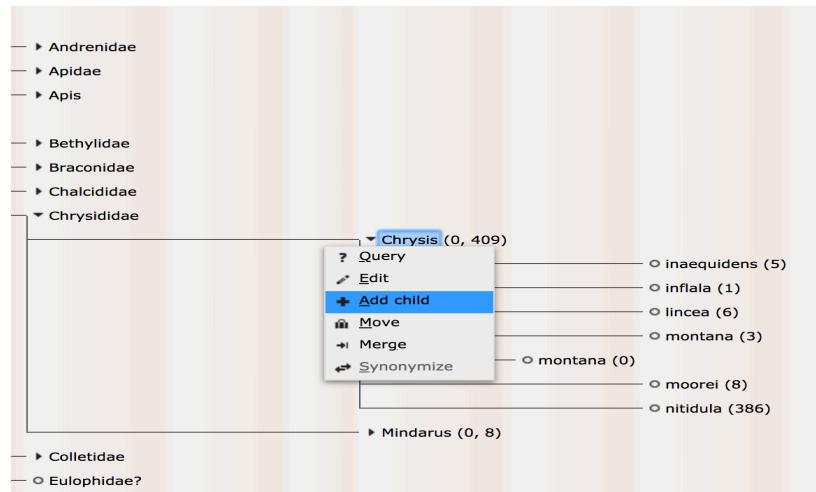
- Select “Taxon” from the list
- Enter the taxon name you want to look for in the search box at the top left. A drop down menu should appear as you start to type. You must select from this list, or not. You cannot just type it in and search.



- When you click the name you want the tree will automatically expand until the group you selected is shown. You can manually do all this by clicking the little triangles next to each name to expand a group.



- In this case the genus and species we need are both already available. If they were not, we can add a new taxon by right clicking the level above what we need to add, otherwise known as the parent taxon, and clicking add child. So, if we wanted to add another **species** of Chrysis, we would right click Chrysis and select add child



- This will bring up the new taxon box. Enter the species name in "Name" and make sure you **select the correct taxonomic rank**. If you have the original authority name enter that (and associated date) in the "Author" box

New Taxon:

Parent of Taxon: Hymenoptera Chrysididae Chrysis

Name: Taxonomic Rank: Subgenus

Full Name:

Preferred Taxon: Is Preferred

Common Name: Is Hybrid

Author: Source:

Hybrid Parent1:

Hybrid Parent2:

GUID:

Do Not Publish

Taxon Citations (0) Add
No Data.

O lincea (6)

- Click save when you are sure you filled this out correctly.
- It make take a few moments after saving, but once it finished, you can immediately see where you placed the new species in the tree.
- Once the species (or other taxon) you need is in the tree go back to the data entry page and search the taxon box again (*remember to use asterisks*). Select the taxon you need in the search results.
- After you enter the taxon, check to see if there is a determiner listed. In this case there is not, but if there were it would be on the same label as the taxon name and often have a date associated with it. Determiner information usually looks something like: Det. Tucker 2019 or Leg. F.M. Gonzalez 5/1994.

Determinations (1) Add Delete

Taxon: Hymenoptera Chrysididae Chrysis nitidula Current

Qualifier: Addendum:

Preferred Taxon: Hymenoptera Chrysididae Chrysis nitidula Name Usage:

Determined Date: Full Date Determiner:

Type Status:

Remarks:

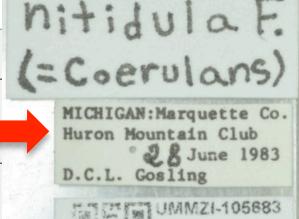
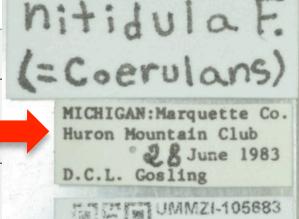
- The determined date can be changed to month/year or just year depending on what information is available. For the determiner (if listed) start typing in the last name and a drop down menu of options will appear. If it is not on the list you can search for a name by clicking the magnifying glass button and using asterisks like with the taxon names. If the name is just not there, you can add the name by clicking the “+” next to the magnifying glass.
- The type status can usually be left blank. However, sometimes you will find a determination label that says something “Holotype”, “Paratype”, “Typus”, etc. If the label says something like that select the matching term from the “Type Status” dropdown menu.

Collecting Information Section

This information is always on a separate label from the determination information and contains information about where, when, who, and how a specimen was collected.

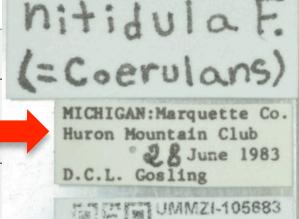
- The “**Field Number**” is often somewhat ambiguous on labels. If it is given, it’s usually a short string of letters or numbers (e.g. site 123, plot xyz-2, etc.). Our ample label does not have a field number.
- “**Method**” is sometimes given for how a specimen was collected. This is a dropdown menu you can select from. Often says something like malaise trap, pit fall trap, or on flower (=hand caught). No collection method is given for our example. If you come across a method not on the list, let me know and I will add to the list.

Collecting Information

Field Number	<input type="text"/>	Method	<input type="text"/>	 0
Start Date	<input type="button" value="Full Date"/> MM/DD/YYYY	End Date	<input type="button" value="Full Date"/> MM/DD/YYYY	
Verbatim Date	<input type="text"/>	second date	<input type="text"/>	
Locality	<input type="text"/>			
Locality and Habitat Notes	<input type="text"/>			
Collecting Event Attribute Add				No Data.
Collectors Add				No Data.

Collecting Event Attribute [Add](#)
No Data.

Collectors [Add](#)
No Data.



The label image shows the following text:
Nitidula F.
(=Coeruleans)
MICHIGAN:Marquette Co.
Huron Mountain Club
28 June 1983
D.C.L. Gosling
UMMZI-106883

- The “**Start Date**” is the first (sometimes only) date given on the label. This should be entered in the standard format mm/dd/yyyy. If there is only a month/year or just a year, click the “Full Date” dropdown next to “Start Date” and change it for the date information you have. In our example the Start Date is 06/28/1983
- If there is a second date, or the date is part of a series, but the last part of the date in “**End Date**”. Insects are often collected passively in traps that can be left out for days, weeks, sometimes even months. If this were the case you would usually see sometime like: Malaise Trap, June 1-July 7 2019. There is no end date in our example.
- The “**Verbatim Date**” is for entering the date *EXACTLY* as it reads on the label with no formatting. In our example you would put “28 June 1983” in the verbatim date. This is important because depending on how confusing the label is, sometimes the start date can be misinterpreted and it is important to have the verbatim date to check it against. This example is pretty easy, but insect labels often have roman numerals included in the date (e.g., 28.vi.1983) and many of the older ones are hard to read. If there is something unclear or totally illegible in the date, put it in hard brackets (e.g., [2?]8 June 1983 if you couldn’t tell for sure that is says 28)

- Filling in the “Locality” box is similar to filling in the taxon box. First Google the location to make sure you are spelling it correctly.
- You can start typing the last part of the location name into the locality box and it will produce a drop down menu for you to select from

Collecting Information

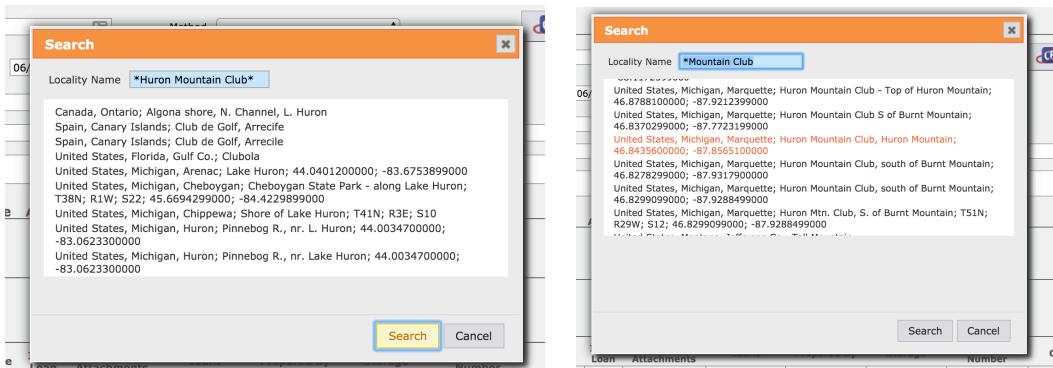
Field Number	<input type="text"/>	Method	<input type="button" value="▼"/>	 0
Start Date	<input type="button" value="Full Date"/> 06/28/1983	<input type="button" value="▼"/>	End Date	<input type="button" value="Full Date"/> MM/DD/YYYY
Verbatim Date	<input type="text" value="28 June 1983"/>	second date	<input type="text"/>	
Locality	<input type="text" value="Huron mountain"/>   			
Locality and Habitat Notes	United States, Michigan, Marquette; Huron Mountain Club ; 46.8435600000; -87.8565100000 United States, Michigan, Marquette; Huron Mountain Club Florence Pond – flying along margin; 46.8493799000; -87.8703000000 United States, Michigan, Marquette; Huron Mountain Club T52N R28W Sec. 21 United States, Michigan, Marquette; Huron Mountain Club T52N R28W Sec. 29 United States, Michigan, Marquette; Huron Mountain Club wet depression near Lily Pond; 46.8475899000; -87.8308899000 United States, Michigan, Marquette; Huron Mountain Club United States, Michigan, Marquette; Huron Mountain Club - Ives Lake; 46.8435600000; -87.8565100000 United States, Michigan, Marquette; Huron Mountain Club - Salmon Trout R at HMC gate; T51N; R28W; S1; 46.8481799000; -87.7988299 United States, Michigan, Marquette; Huron Mountain Club - Top of Huron Mountain; 46.8788100000; -87.9212399000			
Collecting Event	No Data.			
Collectors Add	No Data.			

- This one appears pretty quickly in the dropdown menu. If it is not in the list, then click the magnifying glass to search for the location.

Collecting Information

Field Number	<input type="text"/>	Method	<input type="button" value="▼"/>	 0
Start Date	<input type="button" value="Full Date"/> 06/28/1983	<input type="button" value="▼"/>	End Date	<input type="button" value="Full Date"/> MM/DD/YYYY
Verbatim Date	<input type="text" value="28 June 1983"/>	second date	<input type="text"/>	
Locality	<input type="text"/>   			
Locality and Habitat Notes				
Collecting Event Attribute Add	No Data.			
Collectors Add	No Data.			

- In this case we will look for the “Huron Mountain Club”. Remember to use asterisks before and after. You can also try searching just parts of a name. The first search does not appear to have what we need, but a second search with just “*mountain club” brings up a lot more similar results (the search is often very finicky about how things are entered – do not ask me why)



- The result in the search box, while similar, has geographic coordinates listed when our label does not. So we are going to choose from the original drop down menu that appeared when we started typing because that had an option for the huron mountain club without coordinates.
- If the location you need to enter is not on any of these lists/searches then you would need to add a new location. To add a new location click the “+” at the end of the locality box. This will bring up a “New Locality” box to fill in.
- Adding a new locality is similar to adding a new taxon. You have to have the higher level added before you can add a lower level. For example, a state must exist before you can add a county, a county must exist before you can add a city, a city needs to exist before you can add a place or address in that city.
- To add Huron Mountain Club as a location (if it wasn't already in the available lists), first search for the where the location that the club belongs to in the geography box (i.e., the club is located in Marquette County). You can do this by starting to type in the box, or by searching with the magnifying glass and asterisks.

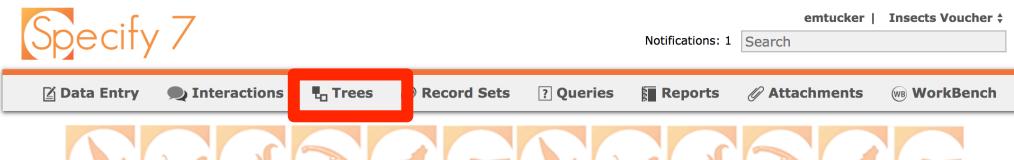
The screenshot shows two windows. The main window is titled 'New Locality:' and contains fields for 'Locality Name' (with a red box around the input field), 'Verbatim Locality', 'Geography' (with a red box around the 'Add' button), 'Point' (dropdown), 'Latitude' (input), 'Source' (input), 'Longitude' (input), 'Parsed' (input), and '???, ???'. Below these are 'Verbatim Latitude' and 'Datum' fields. A 'Geo Coord Details' section shows 'No Data.' A 'Locality Details' section also shows 'No Data.'. There are sections for 'Elevation' (Min Elevation, Max Elevation) and 'Attachments' (a file icon showing 0 attachments, GUID input, and a 'Save' button). A secondary window titled 'Search' is overlaid, showing a search bar with 'Full Name *marquette*' and a list of results: 'United States, Michigan, Marquette' and 'United States, Wisconsin, Marquette County'. It has 'Search' and 'Cancel' buttons.

- Select the place you need, then type in the “Locality Name” and “Verbatim Locality”. In this case the verbatim is the same as the standardized locality.

New Locality: United States, Michigan, Marquette; Huron Mountain Club

Locality Name	Huron Mountain Club	<input type="button" value=""/>	
Verbatim Locality	Huron Mountain Club		
Geography	United States, Michigan, Marquette		
	Point	Source	
	Latitude	Longitude	
	Coords	Parsed	
Verbatim Latitude	<input type="text"/>	Verbatim Longitude	<input type="text"/>
Datum	<input type="text"/>	Lat/Long Method	<input type="text"/>
Geo Coord Details Add			
No Data.			
Locality Details Add			
No Data.			
Elevation			
Min Elevation	<input type="text"/>	Max Elevation	<input type="text"/>
Elevation Method	<input type="text"/>	Elevation Accuracy	<input type="text"/>

- This box is also where you would add coordinates if there were any on the labels. “**Verbatim Latitude**” and “**Verbatim Longitude**” would be where you put the coordinates from the label *EXACTLY* as they were written, the “**Latitude**” and “**Longitude**” box above would be where you put the standardized or corrected coordinates (e.g., if your verbatim coordinates were in minutes, seconds, degrees, you could translate them to decimal degrees and put them in the standardized boxes, or if you looked up the coordinates but they were in the middle of the ocean instead of in Michigan, you could entry the fixed coordinates in the standardized coordinate boxes).
- If an elevation is given that goes in this box as well (usually it looks something like 340', 340ft, 340m) under “**Min Elevation**”. If there is a second elevation listed put in in “**Max Elevation**”.
- Hit save at the bottom of the box when you are done entering the new location.
- You can also search and add new locations through the “Trees” button like you did with the taxon tree. Open a new tab and click “Trees”, then select “Geography” from the list



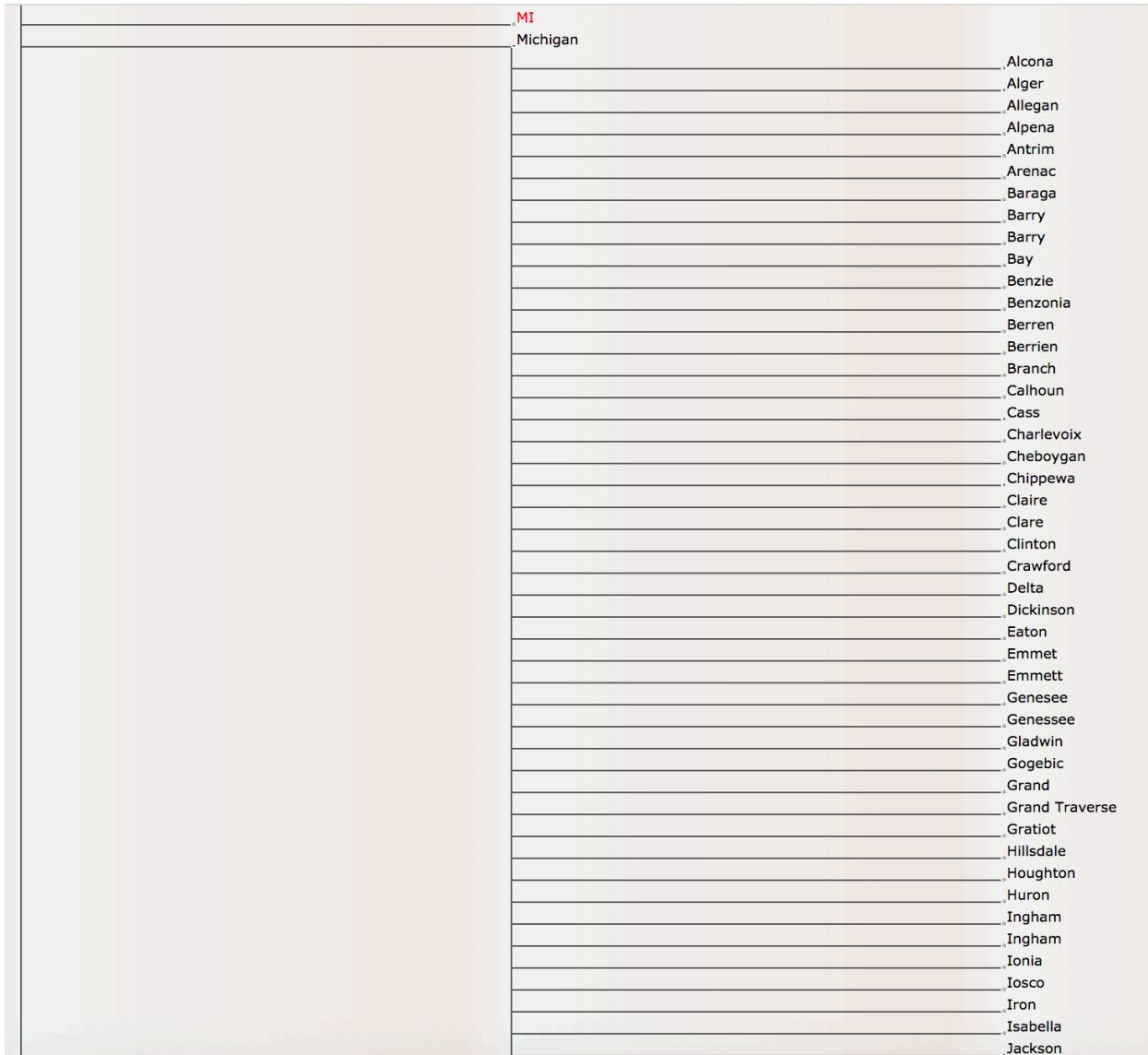
- You can start to type in the place you are looking for in the search box and select it when it pops up or navigate through the arrows on the tree.

Geography Tree

Marquett remember restore forget

Earth	United States, Michigan, Marquette	Country	State	C
▶ Earth	United States, Wisconsin, Marquette County			

- This tree only goes down to the City/Town level. It works great for adding most geographical levels like cities, counties, states, and countries, but when you need to add the specific location (like a club or street) you will need to add that through the locality box as we went over above.



- To add a new a new level to the tree, right click what you want to add it under (the containing geography) and click add child

New Geography:

Parent of Geo: United States, Michigan

Name:

Geographic Rank: County

Preferred Geo:

Remarks:

- Then fill in the location name. Make sure you select the correct “**Geographic Rank**”! Hit save when done. You will be able to see immediately where the new location is in the tree
- Go back to your data entry page.

Collecting Information

Field Number	<input type="text"/>	Method	<input type="button" value="▼"/>	<input type="button" value="0"/>
Start Date	Full Date <input type="button" value="▼"/> 06/28/1983 <input type="button" value="▼"/>	End Date	Full Date <input type="button" value="▼"/> MM/DD/YYYY <input type="button" value="▼"/>	
Verbatim Date	<input type="text" value="28 June 1983"/>	second date	<input type="text"/>	
Locality	United States, Michigan, Marquette; Huron Mountain Club <input type="button" value="▼"/> <input type="button" value="+"/> <input type="button" value=""/> <input type="button" value=""/>			
Locality and Habitat Notes	<input type="text"/>			

Collecting Event Attribute [Add](#)

No Data.

Collectors [Add](#)

No Data.

- The “**Locality and Habitat Notes**” is where you would put information from the label like “meadow habitat” or “on log” or “attacking fly”. This is also a good place to put any other information that doesn’t fit into one of the other boxes.

- Click the “Add” button next to “**Collectors**” if there is a collector given on the label. This will bring up a new entry field for entering the collector(s). It works just like the determiner and cataloger boxes.

Collectors Add

Last Name	First Name	Remarks
Agent		
Remarks		

- Start to type in the collector's last name in the “Agent” box and select from the dropdown menu. If not in the dropdown menu, use the magnifying glass to search (with asterisks) or add a new agent/collector if the name is not in either list.
- The collector in our case is Gosling and is on the list

Collectors Add

Last Name	First Name	Remarks
Agent	gos	Gosling, D. Gosling, D.C.L. Gosling, David C.L. Goss, G.H.
Remarks		 nitidula F. (=Coeruleans) MICHIGAN:Marquette Co. Huron Mountain Club 28 June 1983 D.C.L. Gosling UMMZI-105683

- The “**Preparation**” section should be partially filled out already, but please double check it.
- Both the “**Prep Type**” and the “**Count**” should be filled in. Click the little arrow button under “**Preparation**” to expand the details. If there is no information in the section already click the “**Add**” button next to “**Preparation**”

Preparations Add

Prep Type	Prepared Date	Is On Loan	Preparation Attachments	Count	Prepared By	Storage	Sample Number	Contact
	Pinned	Prepared Date	Full Date	MM/DD/YYYY	<input type="checkbox"/> Is On Loan	SHOW_LOANS		
	Prep Type	Count	Prepared By	Storage				
	1							
Sample Number		Contact						

- Most specimens you'll be working with are pinned, but sometimes you'll get something else like in vial or in an envelope, or a nest. Select the appropriate “**Prep Type**” for your specimen from the dropdown menu.
- “Count” should always be “1”. This refers to the number of specimens. 1 pinned specimen, 1 vial of specimens (even if there are multiple bugs on the pin or vial). Sometimes this number changes to zero if the specimen is out on loan or destroyed for some reason, but you should always put “1”.

- The “**Col. Obj. Attribute**” section is for additional information about the specimen or its host (if information is provided).
- If the “**Sex**” is noted on the specimen label select the correct sex from the dropdown menu

Col Obj Attribute [Delete](#)

<input style="width: 100px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="button" value="Sex"/> Study Voucher <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>	Stage <input style="width: 50px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="button" value="adult"/>											
<input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/> Genitalia No. <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/> Tissue Sample <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>												
<input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/> Sound Record <input style="width: 100px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="button" value="Record Type"/> <input style="width: 100px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="button" value="Single Specimer"/>												
<input style="width: 450px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-bottom: 10px;" type="text"/> Remarks												
<table border="0" style="width: 100%;"> <tr> <td style="width: 30%;">Host Link <input style="width: 20px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="button" value="Link"/></td> <td style="width: 40%;">Relationship Type <input style="width: 100px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="button"/></td> </tr> <tr> <td>Host ID <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/></td> <td>Host Catalog No. <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/></td> <td>Host Sex <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/></td> </tr> <tr> <td>Host Class <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/></td> <td>Host Order <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/></td> <td>Host Family <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/></td> </tr> <tr> <td>Host Genus <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/></td> <td>Host Species <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/></td> <td>Host Subspecies <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text"/></td> </tr> </table>		Host Link <input style="width: 20px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="button" value="Link"/>	Relationship Type <input style="width: 100px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="button"/>	Host ID <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>	Host Catalog No. <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>	Host Sex <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>	Host Class <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>	Host Order <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>	Host Family <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>	Host Genus <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>	Host Species <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px; margin-right: 10px;" type="text"/>	Host Subspecies <input style="width: 150px; border: 1px solid black; border-radius: 5px; padding: 2px;" type="text"/>
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Attachments

- Most of the specimens are adults, but if you have a larva, or pupa, or something change the life “**Stage**” from the dropdown menu
- You will also want to check the “**Record Type**”. Normally this is a single specimen on a pin or a single specimen in a vial. Sometimes though there may be multiple specimens on a pin, or in a vial (“lot”). Select the appropriate “**Record Type**” from the dropdown menu
- If you have a parasite specimen or a pollinator there may be additional information about what the specimen was found on. This goes in the host information section. If the specimen was found on a squirrel, put “squirrel” in the “**Host ID**” (=common name). Then google what family or other taxonomic unit squirrels are and fill out “**Host Family**” or appropriate taxon level. Same thing if a bee was collected on a “bull thistle”. Put “bull thistle” in “**Host ID**” and then google it to find out what the genus/species is for “bull thistle”. Put genus in “**Host Genus**” and species in “**Host Species**”.
- Going back to the top of the page again, besides filling in the “**Cataloger**” (you), there is our “**Catalog Number**” which should already be filled in (=unique number, barcode number). There is also an “**Alt Cat Number**”. This is often a combination of numbers and letters similar to our own UMMZI-####, but from a different museum or project (e.g., USNM 2119, INHS 1009, HIC 15879, etc.).
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