

Milwaukee Public Museum

Terrestrial Parasite Tracker Data Entry Procedures for EMu

Invertebrate Zoology Department

Julia Colby
9/24/2019

Table of Contents

I. Getting Started with EMu and the Catalogue Module.....	5
A. Logging into EMu and Accessing the Catalogue Module	5
B. Creating a New Record.....	5
I. Data Entry 1 Tab.....	7
A. Catalogue Number.....	7
B. Catalogue Number Parts	7
C. Number Type (Other Numbers)	8
D. Numbers (Other Numbers).....	8
E. Catalogue Date.....	9
F. Institution	9
G. Department	9
H. Catalogue.....	9
I. Object Status	10
J. Accession Number.....	10
K. Collection Notes	10
II. Numbers.....	11
A. Collection Event	11
B. Barcode.....	11
C. Barcode Format	12
D. Catalog number	12
E. Catalog Number Parts.....	12
F. Catalog Date.....	12
G. Cataloged by.....	12
H. Collection/ Project.....	12
III. Locations Tab	13
A. Current Location.....	13
B. Released By	14
C. Date Moved	14
C. Time Moved	14
D. Permanent Location.....	14
IV. Specimen Status Tab	15
A. Specimen Count	15
B. Original Count	15
C. No. of Pieces.....	16
D. Taxon.....	16
E. Type Status	16
F. No. of Specimens (Specimen Details)	17

G. Life Stage (Specimen Details).....	17
H. Sex (Specimen Details)	17
J. Remarks (Specimen Details)	17
K. Collection Event	18
V. Preparations Tab.....	19
A. Preparation Type	19
B. Count	19
C. Medium.....	20
D. Prepared By	20
E. Date	20
F. Location	20
G. Prep. Remarks	20
H. Collection Notes	20
I. Reproductive Notes.....	21
VI. Identification Tab	22
A. Identified by	22
B. Date identified	23
VII. Notes – Attrib. Tab	24
A. Note	24
B. Date.....	24
C. Kind	25
D. Attributed To	25
E. Metadata Yes/ No	25
VIII. Tasks Tab	26
A. Description	26
B. Assigned To.....	27
C. Assigned By.....	27
D. Date (Commencement).....	27
E. Notify On	27
F. Notify	28
G. Completed	28
H. Date (Completed)	28
IX. Insect Species Tab.....	30
A. Faunal Regions	30
B. Wisconsin Specimen Count.....	31
X. Parasitology Tab	31
A. No. Of Specimens (Parasitology Details)	32
B. Location on host	32
C. Infection Type.....	32

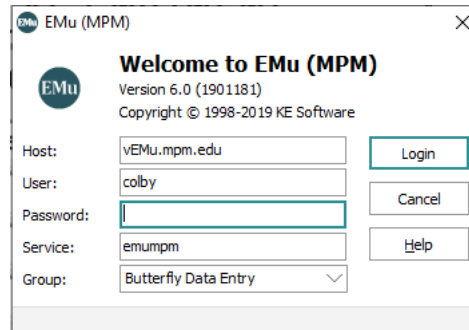
XI. Taxonomy module, Classification tab	33
A. Parent.....	33
B. Species	34
XII. Collection Events module, query instructions.....	35
XIII. Collection Events module, Collection 1 tab.....	36
A. Collection Method	36
B. Date Visited (From) and (To).....	36
C. Site	37
XIV. Collection Events module, Collection 2 tab.....	38
A. Role (Participants).....	38
B. Name (Participants)	38
XV. Sites module, Locality tab.....	40
A. Continent	40
B. Country	41
C. Province/State/Territory	41
D. District/County/Shire.....	41
E. City/Town	41
F. Nearest Named Place	41
G. Special Geographical Unit.....	42
H. Island Group	42
I. Island Name	42
J. Precise Location.....	42
K. From: Elevation (Above Sea Level).....	43
L. To: Elevation (Above Sea Level)	43
XVI. Sites module, Lat/Long tab	44
A. Latitude (DMS)	44
B. Latitude (Dec.).....	44
C. Longitude (DMS)	45
D. Longitude (Dec.)	45
XVII. Sites module, Mapping tab.....	46
A. Township	46
B. Range	46
C. Section	47
D. Quarter.....	47
XVIII. Sites module, Terrestrial tab	48
A. Habitat	48
XIX. Sites module, Notes – Attrib. Tab	49
A. Note	49

B. Date.....	49
C. Kind	50
D. Attributed To	50
XX. Geolocate.....	50
XXI. Parties module, Person tab	51
A. Party Type	51
B. First.....	52
C. Middle.....	52
D. Last	52
E. Gender.....	52
XXII. Parties module, Organization tab	53
A. Party Type	53
B. Organisation.....	53
C. Department	54
XXIII. Parties module, Roles tab.....	55
A. Roles.....	55
XXIV. Parties module, Notes tab.....	56
Appendix A. Metadata for Attributed Notes.....	57

I. Getting Started with EMu and the Catalogue Module

A. Logging into EMu and Accessing the Catalogue Module

1. Log into the EMu system. Fill in the information listed below and press “OK”.

A screenshot of the EMu (MPM) login window. The window has a title bar that says "EMu (MPM)". Inside, there's a logo and the text "Welcome to EMu (MPM)", "Version 6.0 (1901181)", and "Copyright © 1998-2019 KE Software". Below this, there are input fields for "Host:", "User:", "Password:", "Service:", and "Group:". The "Host" field contains "vEMu.mpm.edu". The "User" field contains "colby". The "Password" field is empty. The "Service" field contains "emumpm". The "Group" field is a dropdown menu showing "Butterfly Data Entry". To the right of the input fields are three buttons: "Login", "Cancel", and "Help".

Host: vEMu.mpm.edu

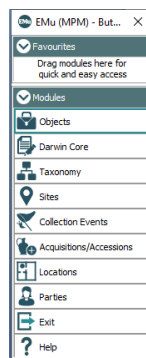
User: [enter your Milwaukee Public Museum computer login]

Password: [enter your Milwaukee Public Museum computer password]

Service: emumpm

Group: Butterfly Data Entry

2. You are at the EMu Main Menu. Choose the EMu Objects module. It will be the module choice at the top.



B. Creating a New Record

1. You are in the Catalogue – Search window. There will be “tabs” listed horizontally at the bottom of the module window. The Data Entry 1 option will be the first tab listed on the left. Make sure this tab is selected or highlighted.
2. You are now in the Search window. You will need to perform a query on the catalogue number that you plan on entering. This is to make sure that the catalogue record is not already entered into the database.

3. You will be performing a search on the catalogue number. Enter the catalogue prefix in the first box for Catalogue Number Parts field and then enter the number part of the catalogue number in the second box for Catalogue Number Parts.

The screenshot shows the 'Objects (1) - Search' window. The interface includes a menu bar (File, Home, Edit, View, Tools) and a toolbar with 'New Record', 'Cancel', and 'Search' buttons. A left sidebar lists 'Data Entry 1' and 'Shortcuts' (Numbers, Specimen Status, Preparation, Insect Species, Locations, Identification, Notes - Attrib., Admin, Classification, Security, Parasitology, Tasks). The main area is divided into two panels: 'Numbers' and 'Description'. The 'Numbers' panel contains fields for 'Catalogue Number', 'Catalogue Number Parts' (with a magnifying glass icon), 'Other Number Type', 'Other Numbers', 'Catalogue Date', and a 'Classification' section with fields for 'Institution', 'Department', 'Catalogue', and 'Object Status'. The 'Description' panel contains fields for 'Accession Number' and 'Collection Notes'. The status bar at the bottom shows 'Search', 'colby', 'Butterfly Data Entry', and 'enumpm'.

For example, if you have a catalogue number of IZ1234, the prefix is “IZ” and the number part of the catalogue number is “1234”. After you enter the catalogue number parts, then press the magnifying glass icon at the upper left to perform the query. (Other ways to query are: Go to File, and select Search; or enter control+F.) If the record is already in the database, then it will show up on the screen in list mode. Double-click on the catalogue number that is listed and this will take you enter the record so that you can make edits. If the record is not already in the database, then a little box will pop up that says “No matching objects”. Press “OK” on this box.

4. To enter a new catalogue record, press the “New Record” icon at the top left. (Another way to enter a new record: Go to File, and select New Record; or enter control+N.)

I. Data Entry 1 Tab

****Make sure you have the Parasite default set in the Objects module (for new records).**

The screenshot shows the 'Butterfly Data Entry' software interface. The title bar reads 'Objects (1) - New'. The menu bar includes 'File', 'Home', 'Edit', 'View', 'Tools', and 'Catalogue'. The ribbon contains icons for 'New Record', 'Save Record', 'Cancel', 'Previous', 'New', 'Additional', 'Search', 'View', 'Sort', 'Reports', and 'Check Spelling'. On the left, a sidebar lists 'Data Entry 1' and 'Shortcuts' (Numbers, Specimen Status, Preparation, Insect Species, Parasitology, Identification, Locations, Tasks, Classification, Security, Admin, Notes - Attrib.). The main area is divided into 'Numbers' and 'Classification' sections. The 'Numbers' section includes 'Catalogue Number' (read-only), 'Catalogue Number Parts' (three input fields), 'Other Numbers' (two input fields with asterisks), 'Catalogue Date' (calendar icon), and 'Description' (text area). The 'Classification' section includes 'Institution' (dropdown: Milwaukee Public Museum (MPM)), 'Department' (dropdown: 1 Invertebrate Zoology), 'Catalogue' (dropdown with asterisk), and 'Object Status' (dropdown: Accessioned). At the bottom, a status bar shows 'New', 'Object 1 of 1', 'colby', 'Butterfly Data Entry', and 'emumpm'.

A. Catalogue Number

You will not be able to enter data in this field. The data is for your reference only. The full catalogue number will auto-fill in this field when data is entered into the Catalogue Number Parts field.

This is a read-only free-text field.

B. Catalogue Number Parts

Enter the catalogue number in three separate parts by prefix, number, and suffix.

1. First Box

This box is for the catalogue prefix. The catalogue prefix is an abbreviation of the museum catalogue that the specimen was catalogued into. Only these terms can be entered in this field:

- ENT (new prefix as of 2016, for Insects and Arachnids)
- IZ (old prefix retired in 2016, for Insects)
- INV (for animals that are not insects or spiders)

This is a free text field.

2. Second Box

This box is for the catalogue number. For example, the catalogue number for the full catalogue number of “IZ20526.8” is “20526”. This is an integer field.

3. Third Box

This box is for the catalogue number suffix. An example of a suffix is: a, b, .1, .2, etc.

This is a free-text fields.

C. Number Type (Other Numbers)

The Number Type field and the Numbers field are for other numbers associated with the specimen. Enter the type of other number in this field.

Only these terms can be entered in this field:

- Field Number
- Collector Number

This is a lookup list table field.

D. Numbers (Other Numbers)

Enter the number in this field that corresponds to the Number Type.

For example, if you entered “Field Number”, you would enter the alpha numerical portion of the number here.

This is a free-text field.

E. Catalogue Date

Enter the catalogue date in this field.

If the specimen has an IZ or RP catalogue number then you will need to look in the catalogue ledger to determine the catalogue date.

If the specimen has an ENT or INV catalogue number then you will enter the date of data entry in this field.

The date should be in the format MM/DD/YYYY.

F. Institution

This field is for the name of the institution that accessioned the object. The only term that will be entered in this field is “Milwaukee Public Museum”. This will be a default term and will auto-fill in the field.

This is a lookup list table field.

G. Department

The Department field is for the Museum Department that catalogues, stores, and maintains the object. The only term that will be entered in this field is “Invertebrate Zoology”. This will be a default term and will auto-fill in the field.

This is a lookup list table field.

H. Catalogue

Enter the museum catalogue for the object.

Only these terms can be entered in this field:

- Entomology (ENT barcodes)

- Insects (IZ catalog numbers)
- Invertebrate Zoology (INV barcodes)
- Radiates & Protozoans (RP)
- Crustaceans (Cr)

This is a lookup list table field.

I. Object Status

The Object Status is the legal status of the object. The only term that will be entered in this field is “Accessioned”. This will be a default term and will auto-fill in the field.

This is a drop-down lookup list field.

J. Accession Number

Enter the accession number.

This field links to the Accession Lots module. If you enter the accession number in this field, and then receive this message “no matching lots“, it means that the accession number has not yet been entered into the Accession Lots module. If you receive this error message, then press “OK” and skip this field, and enter the IRN of the record you are working with into the Tracking spreadsheet.

This is an attachment field to the Accession Lots module.

K. Collection Notes

Enter collection notes about the specimen. Additional label information goes in this field. However, locality and habitat notes go in the Sites module and Collector notes go in the Collection Events module.

You can also enter behavior information and breeding information such as emergence date, pupation date, etc.

The Zoo. Shared tab also has a Collection Notes field. This is the same field and any data entered in this field will also show in that field.

This is a free-text field.

II. Numbers

The screenshot shows the 'Butterfly Data Entry' software window titled 'Objects (1) - New'. The interface includes a menu bar (File, Home, Edit, View, Tools, Catalogue) and a toolbar with icons for New Record, Save Record, Cancel, Previous, New, Additional, View, Sort, Reports, and Check Spelling. A left sidebar contains a 'Tabs' section with 'Data Entry 1' selected, and a 'Shortcuts' section with various options like Specimen Status, Preparation, Insect Species, etc. The main area is titled 'Numbers' and contains several input fields: 'Collection Event', 'Barcode', 'Barcode Format', 'Catalogue Number', 'Catalogue Number Parts' (with a dropdown), 'Catalogue Date', 'Catalogued By', 'Serial Number', 'Geo-Cultural Code', 'Accession Number', and 'Collection/Project'. Each field has a unique identifier (e.g., asterisk, hash, circle) and a help icon. Below these is an 'Other Numbers' section with a table for 'Other Number Type' and 'Other Numbers'. The bottom status bar shows 'New', 'Object 1 of 1', and user information 'colby', 'Butterfly Data Entry', and 'emumpm'.

A. Collection Event

This field appears in several other places in data entry. Please see the collection Event Section for more information.

B. Barcode

Using the barcode scanner, scan in your barcode.

This is a free text field.

C. Barcode Format

This should default to QR code.

This is a lookup list table field.

D. Catalog number

This is a read-only field and pulls from Data Entry 1.

This is a free-text field.

E. Catalog Number Parts

The information in these fields pulls from Data Entry 1. You do not need to modify it here.

F. Catalog Date

If the Catalog Number assigned to the specimen begins with INV or ENT, this date should be today's date.

If the specimen has a CR, RP, or IZ catalog number, you will have to consult the appropriate catalog book to find the cataloged date. If there is no information in the catalog book, leave this field blank.

G. Cataloged by

If the Catalog Number assigned to the specimen begins with INV or ENT, this name should be your name.

If the specimen has a CR, RP, or IZ catalog number, you will leave this field blank.

H. Collection/ Project

This field will autofill from your defaults.

III. Locations Tab

Objects (1) - Display

File Home Edit View Tools Catalogue

New Record Cancel Previous New Additional View Sort Reports Check Spelling All Records Clear Add Record Current Record Invert

[ENT35614] *Protoprutia laredoata*, H. Kons, Texas, Jeff Davis 390535

Current Location

Current Location: MPM Building - Floor 5 - 529 (Invertebrate Zoology) - Cabinet 8 - Drawer 9 - 0018169

Released By: Colby, Julia - Milwaukee Public Museum, Zoology

Other Locations

Permanent Location: MPM Building - Floor 5 - 529 (Invertebrate Zoology) - Cabinet

Independently Moveable

☐ Yes

☒ No

Movement History

Date Moved	Current Location	Requested By
1 05/03/2018	MPM Building - Floor 5 - 529 (Invertebrate Zoology) - Cab...	

Display | Object 108 of 3053 | colby | Butterfly Data Entry | emumpm

A.
Current

Location

Enter the current storage location.

This field links to the Locations module. You can only select data for this field if it has already been entered in the Locations module.

To search for the location in the Locations module, enter the room, cabinet, and drawer information in the field and press the Tab key (or the attachment button). An example of a storage location to query on would be “524M Cabinet 1 Drawer 10”, 529 1 10, or the 7 digit IRN for the location.

NOTE: The query uses “contains” instead of “equals” so you may get a couple different results with this query. For example with the query above, you would also get all the location records in Room 524M with Cabinet 10 and Drawer 1. If you receive more than

one result, then highlight the correct location and attach it to the catalogue record by pressing the attachment button at the upper right.

If you cannot find the correct storage location in the database, then leave this field blank and bring it to the attention of the Zoology Collections Manager.

This is an attachment field to the Locations module.

B. Released By

Enter the name of the person who moved the object to the current storage location. Always enter “Julia Colby” and press the attachment button (green cross icon) to the right of the field. Julia Colby’s party record should auto-fill in this attachment field. This should be covered by the default.

This is an attachment field to the Parties module.

C. Date Moved

Enter the date that the object was moved to the current storage location. Always enter the data entry date in this field.

The date should be in the format MM/DD/YYYY.

C. Time Moved

This field auto-fills with the time after the record is saved.

D. Permanent Location

Enter the permanent storage location in this field. This data will be the same as the current storage location.

This is an attachment field to the Locations module.

IV. Specimen Status Tab

The screenshot shows a software interface for specimen data entry. The title bar indicates 'Objects (1) - Display'. The menu bar includes File, Home, Edit, View, Tools, and Catalogue. The toolbar contains icons for New Record, Cancel, Previous, New, Additional, Sort, Reports, Check Spelling, All Records, Clear, Add Record, Current Record, and Invert. The main content area is titled '[ENT35614] *Protoprutia laredoata*, H. Kons, Texas, Jeff Davis' with a record ID of 390535. On the left, a sidebar lists tabs: Data Entry 1, Numbers, Specimen Status (selected), Preparation, Insect Species, Parasitology, Identification, Locations, Tasks, Classification, Security, Admin, and Notes - Attrib. The main panel is divided into sections: Collection Details (Department: 1 Invertebrate Zoology, Specimen Count: 1, No. of Pieces: 1; Catalogue: 1 Entomology, Original Count: 1), Identification (Taxon: 1 *Protoprutia laredoata* : Geometridae : Lepidop, Type Status:), Collection Event (North America, United States, Texas, Jeff Davis, Limpia Creek, Davis Mountains State Park. (30 36)), and Specimen Details (a table with columns: No. of Specimens, Life Stage, Sex, Remarks). The Specimen Details table has one row with values: 1, 1, Adult, Unknown. Below this are fields for Set Mark, Parasites, and Indicators (On Loan, Tissue, Voucher, On Exhibit, Bred Spec.). The status bar at the bottom shows 'Display', 'Object 108 of 3053', and user names 'colby', 'Butterfly Data Entry', and 'emumpm'.

No. of Specimens	Life Stage	Sex	Remarks
1	1	Adult	Unknown

A. Specimen Count

Enter the number of specimens. The number will almost always be “1”. This will be a default term and will auto-fill in the field. You can change the number in this field if needed. If there is a genitalia vial or other dissection prep with the specimen then the count would be “2”.

This is an integer field.

B. Original Count

Enter the original number of specimens. The number will almost always be “1”. This will be a default term and will auto-fill in the field. You can change the number in this field if needed.

This is an integer field.

C. No. of Pieces

Enter the number of specimen pieces. If the specimen is whole it will always be “1”. If the specimen has broken into two pieces then the number will be “2”. If there is a genitalia vial or other dissection prep then the number of pieces would be “2” (please see Preparation tab, section A for preparation details data entry.)

This is an integer field.

D. Taxon

Enter the taxonomic name of the specimen.

To enter, type in genus and species into the field, and hit the Tab key (or the attachment button) to query in the Taxonomy module. The taxonomic record should automatically attach to the catalogue record and taxonomic summary data should fill in the field.

If there are no results for the genus species, then press the green attachment button at the right. This takes you into the Taxonomy module in Search mode. Press the new record icon at the top left and follow data entry procedures for the [Taxonomy module at the end of the Catalogue module section](#).

This is an attachment field to the Taxonomy module.

E. Type Status

Enter the kind of type status in singular form. See International Code of Zoological Nomenclature adopted by the XX International Union of Biological Sciences. Examples of type status are:

- Holotype
- Paratype
- Syntype
- Allotype
- Lectotype
- Paralectotype
- Neotype

- Type
- Cotype

This is a drop-down lookup list field.

F. No. of Specimens (Specimen Details)

Enter the number of specimen pieces by specimen type, life stage, and sex. The number will almost always be “1”. This will be a default term and will auto-fill in the field. You can change the number in this field if needed.

This is an integer field.

This is a lookup list.

G. Life Stage (Specimen Details)

Enter the life stage of the specimen. Here are the other life stage terms:

- Juvenile
- Unknown
- Adult

This is a lookup list field.

H. Sex (Specimen Details)

Enter the sex of the specimen if it’s on the label. The following are the terms to use:

- Female
- Male
- Gynandromorph
- Unknown

This is a lookup list field.

J. Remarks (Specimen Details)

Enter any notes or comments about the specimen details. You might use this field for information about caste, form, or other information about the specimen detail.

This is a free-text field.

K. Collection Event

This is an attachment field to the Collection Events module and to the Sites module where you will enter information about collector, collection date, locality, mapping, and latitude/longitude.

Press the green attachment button at the right. This takes you into the Collection Events module in Search mode and follow query and data entry procedures for the Collections Events module [at the end of the Catalogue module section](#).

V. Preparations Tab

Objects (1) - Display

File Home Edit View Tools Catalogue

New Record Cancel Previous New Additional View Sort Reports Check Spelling All Records Clear Add Record Current Record Invert

[ENT1148] *Bombus griseocollis*, S. Ukkrit, Wisconsin, Milwaukee 352275

Preparation Details

Prep. type	Count	Medium	Prepare...	Date	Location	Prep. remarks
1 Pinned	1					
*						

Related Objects

Object Name	Relationship
*	

Collection Notes

Reproductive Notes

Accession Details

Display | Object 32 of 367 colby | Butterfly Data Entry | emumpm

A. Preparation Type

Enter the type of preparation. A specimen might have more than one type of preparation. Some examples of preparations are :

- Slide
- 70% EtOH
- Pinned
- Genitalia vial

This is an integer field.

B. Count

Enter the number of each type of preparation.

This is an integer field.

C. Medium

Enter the preparation medium. Many preparations do not have a medium.

Two examples are:

- Alcohol (for 70% EtOH)
- Glycerin (for Genitalia vials)

This is a lookup list field.

D. Prepared By

If you know who prepared the prep type, enter their name here. Note: for this grant you will probably not know this information.

E. Date

If you know when the prep type was prepared, enter the date here. Note: for this grant you will probably not know this information.

F. Location

Do not use this field.

G. Prep. Remarks

Enter any remarks about the preparations here. An example of a remark might be listing the dissector's unique dissection or slide number. You will use this field rarely.

H. Collection Notes

Enter collection notes about the specimen. Additional label information goes in this field. However, locality and habitat notes go in the Sites module and Collector notes go in the Collection Events module. Host data goes either in Parasites tab, or the "Host Association" attributed note type.

.You can also enter behavior information and breeding information such as emergence date, pupation date, etc.

The Data Entry 1 tab also has a Collection Notes field. This is the same field and any data entered in this field will also show in that field.

This is a free-text field.

I. Reproductive Notes

Enter the notes about the reproductive systems of the specimen.

Example - If the specimen was found in copula or laying eggs.

This is a free-text field.

VI. Identification Tab

The screenshot shows a software interface titled 'Objects (1) - Display'. It features a menu bar with 'File', 'Home', 'Edit', 'View', 'Tools', and 'Catalogue'. Below the menu is a toolbar with icons for 'New Record', 'Cancel', 'Previous', 'New', 'Additional', 'Sort', 'Reports', 'Check Spelling', 'All Records', 'Clear', 'Add Record', 'Current Record', and 'Invert'. The main area is divided into a left sidebar and a right pane. The sidebar has a 'Shortcuts' section with links to 'Data Entry 1', 'Numbers', 'Specimen Status', 'Preparation', 'Insect Species', 'Parasitology', 'Identification' (selected), 'Locations', 'Tasks', 'Classification', 'Security', 'Admin', and 'Notes - Attrib.'. The right pane is titled '[ENT1148] Bombus griseocollis, S. Ukkrit, Wisconsin, Milwaukee' with a record ID of '352275'. It contains an 'Identification Details' section with fields for 'Family #', 'Taxon' (set to 'Bombus griseocollis : Apidae : Hymenoptera : Insecta : Arthropoda'), 'Qualifier', 'Qualifier rank', 'Confidence', 'Qualified name' (set to 'Bombus griseocollis'), 'Type status', 'Identified by' (set to '1 Bartelme, Richard'), 'Date identified', 'Filed as' (radio buttons for 'Yes' and 'No'), and 'Identification notes'. Below this is an 'Identification List' table with columns: 'Qualified name', 'Identified by', 'Date ident...', 'Type Status', 'Identification notes', and 'Last modified'. The table contains one row with the value '1 Bombus griseocollis' and 'Bartelme, Ric...'. At the bottom is a 'Lot Label Notes' section with a text area. The status bar at the bottom shows 'Display | Object 32 of 367' and user names 'colby', 'Butterfly Data Entry', and 'emumpm'.

A. Identified by

Enter the person who identified the specimen. The person who identifies the specimen is also called a “Determiner” therefore “Det” may be before the person’s name on the label. There may be more than one determiner. Each determiner would be entered on separate rows in this field.

This is an attachment field to the Parties module where you will enter the name, gender, and role of the participant.

You will first need to do a search in this field. Enter the determiner’s last name and press the attachment button.

If the query finds name results, then choose/highlight the correct party name for the determiner and press the attachment button at the upper right to attach the Party module record to the Catalogue module record.+

If there are no results for the last name, then press the green attachment button at the right. This takes you into the Parties module in Search mode. Press the new record icon at the top left and follow data entry procedures for the [Parties module at the end of the Catalogue module procedures.](#)

This is an attachment field to the Parties module.

B. Date identified

Enter the date the specimen was identified.

The date should be in the format MM/DD/YYYY.

VII. Notes – Attrib. Tab

Catalogue (1) - Display

File Edit Select View Tools Tabs Parts Multimedia Window Help

[ENT2976] *Papilio glaucus*, D. Hermann, Maryland, Queen Anne 354376

Note Details

Note:

Date: Kind: Metadata: ☐ Yes ☐ No

References Details

Attributed To: *

Bibliographic Reference: *

Notes Summary

Note	Date	Kind	Metadata	Bibliographic Reference
*				

Data Entry 1 Locations Zoo. Specimen Zoo. Shared Identification **Notes - Attrib.** Tasks Insect

Display Object 1 of 1 millerd Butterfly Data Entry emumpm

Talk to Julia before entering data into this tab.

A. Note

Enter the attributed note.

This is a free-text field.

B. Date

Enter the date the note is entered into EMu.

The date should be in the format MM/DD/YYYY.

C. Kind

Enter the kind of note.

This is a lookup list field.

D. Attributed To

Enter the name of the staff person who is making the note. The name of the staff person should already be entered into EMu. To perform a search in this field, enter the staff person's first name and last name and press the attachment button.

Choose/highlight the correct party name for the collector and press the attachment button at the upper right to attach the Party module record to the Catalogue module record.

This is an attachment field to the Parties module.

E. Metadata Yes/ No

Choose the correct radio button for your note type. See the appendix at the end of this document for metadata by note type.

VIII. Tasks Tab

The screenshot shows the 'Objects (1) - Display' window with the 'Tasks' tab selected. The window contains a menu bar, a toolbar, and a main content area. The main content area is divided into several sections: 'Task Information', 'Commencement', 'Completion', and a 'Tasks' table. The 'Task Information' section includes fields for 'Description', 'Assigned To', 'Assigned By', and 'Result'. The 'Commencement' section includes fields for 'Date', 'Notify On', and 'Notify'. The 'Completion' section includes fields for 'Completed', 'Hours taken', 'Date', 'Notify On', and 'Notify'. The 'Tasks' table at the bottom has columns for 'Description', 'Date', and 'Completed'. The status bar at the bottom indicates 'Display Object 32 of 367' and 'colby Butterfly Data Entry emumpm'.

There will a task template that will load skeletal data for the “Needs label” and “Question for Collections Manager” tasks. Press the icon at the right of the Tasks History Summary to load the “Needs label” task. The icon looks like a clipboard with a red checkmark.

A. Description

Enter the task description. For this project, here are two tasks we have predicted you will need. There may be others:

- Needs label

Make sure that these descriptions are typed in the same every time as this ensures accurate queries.

This is a free-text field.

B. Assigned To

Enter the name of the staff person who receives the assigned task. The name of the staff person should already be entered into EMu. To perform a search in this field, enter the staff person's first name and last name and press the attachment button.

Choose/highlight the correct party name for the collector and press the attachment button at the upper right to attach the Party module record to the Catalogue module record.

This is an attachment field to the Parties module.

C. Assigned By

Enter the name of the staff person who assigns the task. The name of the staff person should already be entered into EMu. To perform a search in this field, enter the staff person's first name and last name and press the attachment button.

Choose/highlight the correct party name for the collector and press the attachment button at the upper right to attach the Party module record to the Catalogue module record.

This is an attachment field to the Parties module.

D. Date (Commencement)

Enter the date that the task is scheduled to commence. This will be the date that the task is assigned (current date).

The date should be in the format MM/DD/YYYY.

E. Notify On

Enter the date on which notification of the scheduled commencement of the task should occur. This will be one day after the Date (Commencement). It needs to be at least one day from the Date (Commencement) or the notify process won't work. For **Commencement**, only 1 email message is received – on the Notify On date.

The date should be in the format MM/DD/YYYY.

F. Notify

Enter the name of the staff person who should be notified of the task's completion. The name of the staff person should already be entered into EMu. To perform a search in this field, enter the staff person's first name and last name and press the attachment button.

Choose/highlight the correct party name for the collector and press the attachment button at the upper right to attach the Party module record to the Catalogue module record.

This is an attachment field to the Parties module.

G. Completed

There are three options to enter here:

[blank]

Yes

No

You will need to leave this field blank. It defaults as blank. When the field is left blank – the “Notify” staff person will receive an email notice on the Notify Date but that is the only notice they receive.

For Reference:

Entering "No" – the “Notify” staff person will receive an email notice on the Date (Commencement) and every day after until you enter "Yes" for completion which stops the emails.

Entering “Yes” – this will stop the notifications from being sent.

H. Date (Completed)

Enter the date on which the task is scheduled to be completed. Each day EMu automatically sends an email notification to all people assigned to a task that has not been marked as completed by its scheduled completion date (if “Completed” is marked “No”).

The date should be in the format MM/DD/YYYY.

IX. Insect Species Tab

Please note that Taxon and Preparation Details may already be filled in from other tabs. Please ignore these fields on this tab.

A. Faunal Regions

Enter the number of specimens from each faunal region. A faunal region is a region of the earth with a distinct and characteristic assemblage of animal taxa. These are the fields for faunal region:

- Palearctic
- Nearctic
- Neotropical
- Oriental
- Ethiopian
- Australian
- Unknown

The United States is in the Nearctic faunal region. Refer to the faunal region map for other options.

These are integer fields.

B. Wisconsin Specimen Count

Enter the number of specimens with a locality of Wisconsin.

This is an integer field.

X. Parasitology Tab

The screenshot displays the Butterfly Data Entry software interface. The title bar reads "Objects (1) - Display". The menu bar includes "File", "Home", "Edit", "View", "Tools", and "Catalogue". The toolbar contains icons for "New Record", "Cancel", "Previous", "New", "Additional", "View", "Sort", "Reports", "Check Spelling", "All Records", "Clear", "Add Record", "Current Record", and "Invert". The main content area shows the record for "[ENT1148] Bombus griseocollis, S. Ukkrit, Wisconsin, Milwaukee" with ID "352275". The left sidebar has a "Shortcuts" menu with options: "Data Entry 1", "Numbers", "Specimen Status", "Preparation", "Insect Species", "Parasitology" (selected), "Identification", "Locations", "Tasks", "Classification", "Security", "Admin", and "Notes - Attrib.". The "Parasitology" tab is active, showing a table with columns "No. of Specimens", "Location on Host", and "Infection Type". Below this is an "Identification" section with fields for "Host Taxon:", "Host Life Stage:", and "Host Sex:". Another "Identification" section follows with a table with columns "Object Name" and "Relationship". The status bar at the bottom indicates "Display | Object 32 of 367" and includes links for "colby", "Butterfly Data Entry", and "emumpm".

No. of Specimens	Location on Host	Infection Type
*		

Object Name	Relationship
*	

A. No. Of Specimens (Parasitology Details)

Enter the number of specimens in the vial or on the slide here.

This is an integer field.

B. Location on host

If the specimen includes data about where on the host it was located (e.g. intestines, chest cavity), enter that data here.

This is a look up list field.

C. Infection Type

If the label includes data about what type of infection it was (experimental vs. Wild), include that information here. Do not fill in information if you do not have it.

This is a look up list field.

XI. Taxonomy module, Classification tab

****Make sure you have the LEPNET default set in the Taxonomy module (for new records).**

The screenshot shows the EMu Taxonomy (1) - New window. The interface includes a menu bar (File, Home, Edit, View, Tools), a toolbar with icons for New Record, Save Record, Cancel, Previous, New, Additional, View, Sort, Reports, and Check Spelling, and a search bar with the value 54227. On the left, a sidebar lists various tabs and shortcuts. The main area is divided into several sections: Classification (Parent, Family & No., Genus & No., Subgenus, Species, Subspecies, Other), Hybrid & Parentage (Hybrid?, Rank, Sex, Parent), Cultivar Name (Cultivar?, Name), Controls (Applicable Code, Rank), Group (Group), Scientific Name (Automatic?, Name), and Currently Accepted Name (Currently Accepted?, Current Name). The 'Parent' field in the Classification section is highlighted with a red box.

Classification	Hybrid & Parentage
Parent: <input type="text"/>	Hybrid? <input type="text"/> Rank: <input type="text"/>
Family & No.: <input type="text"/>	Sex: <input type="text"/> Parent: <input type="text"/>
Genus & No.: <input type="text"/>	<input type="text"/> <input type="text"/>
Subgenus: <input type="text"/>	<input type="text"/> <input type="text"/>
Species: <input type="text"/>	Cultivar Name
Subspecies: <input type="text"/>	Cultivar? <input type="text"/> Name: <input type="text"/>
Other: <input type="text"/>	Controls
AOU #: <input type="text"/> MONA No.: <input type="text"/> Int. Code: <input type="text"/>	Applicable Code: <input type="text"/> Rank: <input type="text"/>
	Group
	Group: <input type="text"/>
Scientific Name	
Automatic? <input type="text"/> Name: <input type="text"/>	
Currently Accepted Name	
Currently Accepted? <input type="text"/> Current Name: <input type="text"/>	

A. Parent

Enter the genus name for your genus and press the attachment button or the Tab key to query for the term.

If the query finds results, then choose/highlight the correct genus name and press the attachment button at the upper right to attach the parent genus record to the species record.

If there are no results for the genus taxa name, then let Julia know and she will take care of adding the genus name to EMu.

This is an attachment field to the Taxonomy module.

B. Species

Enter the species name in all lower case.

This is a lookup list field.

XII. Collection Events module, query instructions

****Make sure you have the 2 LEPNET defaults set in the Collection Events module (for new records and for query).**

First you will need to query to see if the Collection Event with attached Sites record is already entered into EMu. To do so you will need to query on the following fields:

Date Visited on Collection 1 tab: Enter the starting collection date

Name (Participants) on Collection 2 tab: Query on last name and press the green attachment button

Summary Data on Admin tab: Enter the lowest level of locality whether that is City/Town or a place mentioned in Precise Locality (if it is a phrase make sure there are quote marks around it) AND latitude or longitude if you have it.

Press the search icon at the top left to query.

STUDY the results, even if there is only one result. Make sure all the data including Collection Method, Collector Name, Date Visited From and To, all Locality data, all Latitude/Longitude data, all Mapping data and all Notes data is identical to what you are entering. If it is, then select the collection event record. If not, then you will need to enter a new record. Press the new record icon at the top right and enter data as described on the next page.

Remember, NEVER add new data to or modify an existing Collections Event module or Site module record.

XIII. Collection Events module, Collection 1 tab

Collection Events (1) - New

File Home Edit View Tools

New Record Save Record Cancel Previous New Additional Sort Reports Check Spelling

File Search View Tools

142875

Collection Details

Collection Type: Collection Method: *

Sites

Site	Date Visited (F...	Date Visited...	Time Visit...	Time Visited ...
*				

Other Numbers

Number Type	Other Numbers	Description
*		

New Event 1 of 1 colby Butterfly Data Entry emumpm

A. Collection Method

Enter the method of collection or “how collected” for the specimen. Examples of a collection method are “Bait” and “Black Light”. This field uses a controlled vocabulary; please refer to the natural history data standards to choose your term.

This is a drop-down lookup list field.

B. Date Visited (From) and (To)

Enter the collection dates for “from” and for “to” (two fields). If the specimen was collected on one date, then enter this date in both fields.

The date should be in the format MM/DD/YYYY.

C. Site

This is an attachment field to the Sites module where you will enter information about locality, latitude/longitude, and mapping.

First you will need to query to see if the Sites record is already entered into EMu. To do this you will need to enter the following in this field:

The lowest level of locality data whether that is a City/Town or a place mentioned in Precise Locality (if it is a phrase make sure there are quote marks around it) AND latitude or longitude or mapping information if you have it. Press the attachment button at the right to query.

STUDY the results, even if there is only one result. Make sure all the data including all Locality data, all Latitude/Longitude data, all Mapping data and all Notes data is identical to what you are entering. If it is, then select the correct Sites record.

NEVER add new data to or modify an existing Site module record.

If there are no matching records, then you will need to enter a new record. Press the new record icon at the top left and follow data entry procedures for the Sites module [at the end of the Parties module section](#).

XIV. Collection Events module, Collection 2 tab

Collection Events (1) - New

File Home Edit View Tools

New Record Save Record Cancel Previous New Additional Search View Sort Reports Check Spelling

Tabs: Collection 1 Collection 2

Shortcuts: Tasks Notes - Attrib. Notes Security Admin

Participants

Name	Role
*	

New Event 1 of 1 colby Butterfly Data Entry emumpm

If collector data has “et al.” at the end and there are no additional collector names listed in the catalogue book then you do not need to enter the “et al.” into EMu.

A. Role (Participants)

Enter the role of the person involved with the collection event. You will always enter “Collector”. If there is more than one collector involved with the event, then you will continue to use the term “Collector” in this field for every collector entered.

This is a lookup list table field.

B. Name (Participants)

This is an attachment field to the Parties module where you will enter the **name, and role** of the participant.

You will first need to do a search in this field. Enter the collector's last name and press the attachment button.

If the query finds name results, then choose/highlight the correct party name for the collector and press the attachment button at the upper right to attach the Party module record to the Collection Events record.

If there are no results for the last name, then press the green attachment button at the right. This takes you into the Parties module in Search mode. Press the new record icon at the top left and [follow data entry procedures for the Parties module.](#)

XV. Sites module, Locality tab

****Make sure you have the 2 LEPNET defaults set in the Sites module (for new records and for query).**

The screenshot shows a software window titled "Sites (1) - Display". It has a menu bar (File, Edit, Select, View, Tools, Tabs, Multimedia, Window, Help) and a toolbar with various icons. The main area is divided into several sections:

- Locality Details:** Fields for Continent (North America), Country (United States), Province/State/Territory (Wisconsin), District/County/Shire (Portage), City/Town (Stevens Point), Nearest Named Place, and Special Geographic Unit.
- Island/Aquatic Details:** Fields for Island Group, Island Name, and Waterbody.
- Elevation (Above Sea Level):** Fields for From (metres/feet), To (metres/feet), and Determination Method.
- Elevation (Relative):** Fields for From (metres/feet), To (metres/feet), Determination Method, and Reference Point.
- Precise Location:** A text field containing "W River Dr in Stevens Point. Approximately 1.5 miles south of River View Ave."

At the bottom, there are tabs for "Locality", "Lat/Long", "Mapping", "Terrestrial", and "Notes - Attrib.". The "Locality" tab is selected. Below the tabs, it says "Display Site 57526 of 57546". On the far right, there are buttons for "millerd", "Butterfly Data Entry", and "emumpm".

First use the Getty Thesaurus of Geographic Names (TGN) as a reference for locality names:

<http://www.getty.edu/research/tools/vocabularies/tgn/>

If you do not find your locality name through that search then use Geographic Names Information System (GNIS):

<https://geonames.usgs.gov/>

A. Continent

Enter the continent where the specimen was collected. Most likely the term will be "North America" for this project.

This is a hierarchal lookup list field for Site Locality.

B. Country

Enter the country where the specimen was collected. We use the term “United States” instead of “United States of America” or “USA”. Most likely the term will be “United States” for this project.

This is a hierarchal lookup list field for Site Locality.

C. Province/State/Territory

Enter the state, province, or territory where the specimen was collected.

This is a hierarchal lookup list field for Site Locality.

D. District/County/Shire

Enter the county, district, or shire where the specimen was collected. Do not include the word “county” or “province” after the name. So “King County” would be “King”.

This is a hierarchal lookup list field for Site Locality.

E. City/Town

Enter the city or town where the specimen was collected.

This is a hierarchal lookup list field for Site Locality.

F. Nearest Named Place

Enter the nearest named place or closest place (findable on a map) from where the specimen was collected. This is mutually exclusive from the City/Town data. Only enter this data if you need it to find the precise location. You will use this field rarely.

For example, “Mexico City” is the nearest named place for the location “Finca Bianca, 5 km South of Mexico City”. This is because “Finca Bianca” is the name of someone’s property, and won’t appear on a map, or may be renamed if the property changes hands.

This is a hierarchal lookup list field for Site Locality.

G. Special Geographical Unit

Enter the geographical unit. This is custom or discipline defined and does not fit into the traditional geographic hierarchy of Continent-Country-State, etc.

Although this field is a lookup list field it is not part of the Site Locality lookup list hierarchy.

This is a lookup list field.

H. Island Group

Enter the island group where the specimen was collected. “San Juan Islands” is an example of an island group.

This is a hierarchal lookup list for Island Grouping.

I. Island Name

Enter the name of the island where the specimen was collected. Usually the word “Island” is part of the standard name, although there are exceptions and you will need to make certain of the correct name by checking with TGN. “Orcas Island” is an example of an island name.

This is a hierarchal lookup list for Island Grouping.

J. Precise Location

Enter the precise location where the specimen was collected.

Precise location is outside of a District/County/Shire or a City/Town. Do not enter habitat in this field. State Natural Areas, State Parks, and National Parks would also be documented in this field.

This is also where we include data like “5 miles south of bridge” or “halfway up west bluff face” but not info like “nectaring on milkweed”.

Enter data from the largest to the smallest.

Miles, meters, etc. are always spelled out.

N, S, E, W are also always spelled out and are lower case unless part of the name.

The precise locations begins with an upper case character and ends with a period (sentence form).

This is a free-text field.

K. From: Elevation (Above Sea Level)

Enter the starting elevation in either feet or meters. (The equivalent feet or meters will auto-fill.)

If you do not have a range of feet or meters for the elevation then enter the same elevation in both “From” and “To”.

This is a float field.

L. To: Elevation (Above Sea Level)

Enter the ending elevation in either feet or meters. (The equivalent feet or meters will auto-fill.)

If you do not have a range of feet or meters for the elevation then enter the same elevation in both “From” and “To”.

This is a float field.

XVI. Sites module, Lat/Long tab

The screenshot shows the 'Sites (1) - New' window. The left sidebar has 'Lat/Long' selected under the 'Tabs' section. The main area is divided into two sections: 'Latitude/Longitude Details' and 'Latitude/Longitude List'.

Latitude/Longitude Details

Latitude (DMS)	Latitude (Dec.)	Latitude (DMS)	Longitude (DMS)	Longitude (Dec.)	Longitude (DMS)	Mo...	Comment
*							

Determination Source: Radius (Verbatim): Probability:
Determination Method: Radius (Numeric): Units:
Determined By: Geometry: Datum:
Determination Date: Derive Centroid: ☐ System ☐ User Preferred:
Centroid Latitude (DMS): Dec.: Centroid Longitude: Dec.:
Notes:

Latitude/Longitude List

Determination Source	Centroid Latitude (Dec.)	Centroid Longitude	Preferred
*			

A. Latitude (DMS)

Enter the latitude of the locality in degrees, minutes, and seconds. An example of the format is: 42 32 15 N.

You should not enter the punctuation for DCM. The degrees, minutes, seconds and direction parts should have space in between them. The direction should go at the end. Once you enter the data and hit the Tab key, then the Latitude (Dec.) data automatically fills in.

This is a latitude field.

B. Latitude (Dec.)

Enter the latitude of the locality in decimal form. An example of the format is: 42.5376.

Once you enter the data and hit the Tab key, then the Latitude (DMS) data automatically fills in.

This is a float field.

C. Longitude (DMS)

Enter the longitude of the locality in degrees, minutes, and seconds. An example of the format is: 87 53 36 W.

You should not enter the punctuation for DCM. The degrees, minutes, seconds and direction parts should have space in between them. The direction should go at the end. Once you enter the data and hit the Tab key, then the Longitude (Dec.) data automatically fills in.

This is a longitude field.

D. Longitude (Dec.)

Enter the longitude of the locality in decimal form. An example of the format is: -87.8933.

Once you enter the data and hit the Tab key, then the Longitude (DMS) data automatically fills in.

This is a float field.

XVII. Sites module, Mapping tab

The screenshot shows the 'Sites (1) - New' window in the Mapping tab. The left sidebar contains a list of tabs: Locality, Lat/Long, Mapping (selected), Terrestrial, GEOlocate, Notes - Attrib., Security, and Admin. The main area is empty. At the bottom, there is a 'Township/Range Details' section with a table.

Township	Range	Section	Quarter	Comment
*				

If you have multiple sections, for example T20N R3E S34&35, then you will need to enter the data on two rows in the Township/Range Details section. You would enter them as:

20N 3E 34
20N 3E 35

A. Township

Enter the township number and direction. An example is “34N”. There are no spaces between the number and the direction.

This is a free-text field.

B. Range

Enter the range number and direction. An example is “6W”. There are no spaces between the number and the direction.

This is a free-text field.

C. Section

Enter the section number. An example is “9”. You do not enter a direction in this field.

This is a free-text field.

D. Quarter

Enter the quarter fractions with direction. An example is “NW1/4NE1/4”. The direction is entered before the fraction. There are no spaces.

This is a free-text field.

XVIII. Sites module, Terrestrial tab

Sites (1) - New

File Home Edit View Tools

New Record Save Record Cancel Previous New Additional View Sort Reports Check Spelling

Locality Lat/Long Mapping Terrestrial GEOLocate Notes - Attrib. Security Admin

Habitat Details

Habitat:

69954

New Site 1 of 1 colby Butterfly Data Entry emumpm

A.

Habitat

Enter habitat data for the specimen. An example of a habitat is “open oak savannah”.

The difference between a habitat and a precise location is that you cannot locate a habitat on a map.

This is a free-text field.

XIX. Sites module, Notes – Attrib. Tab

The screenshot shows the 'Sites (1) - New' window. The 'Notes - Attrib.' tab is selected in the sidebar. The 'Note Details' section contains a large text field for the note, a date picker, a 'Kind' dropdown, and a 'Metadata' radio button set to 'Yes'. The 'References Details' section has two text fields: 'Attributed To' and 'Bibliographic Reference'. The 'Notes Summary' table has the following structure:

Note	Date	Kind	Metadata	Bibliographic Reference
*				

Talk to Julia before entering data into this tab.

A. Note

Enter the attributed note. You won't need to enter an attributed note for Sites very often, but if you do it probably with a "Locality" note. For example "Could not find locality in TGN."

This is a free-text field.

B. Date

Enter the date the note is entered into EMu.

The date should be in the format MM/DD/YYYY.

C. Kind

Enter the kind of note. You will most often enter the kind of “Locality”.

This is a lookup list field.

D. Attributed To

Enter the name of the staff person who is making the note. The name of the staff person should already be entered into EMu. To perform a search in this field, enter the staff person’s first name and last name and press the attachment button.

Choose/highlight the correct party name for the collector and press the attachment button at the upper right to attach the Party module record to the Sites module record.

This is an attachment field to the Parties module.

XX. Geolocate

Please see the Geolocate 101 Manual to use this tab.

XXI. Parties module, Person tab

****Make sure you have the LEPNET default set in the Parties module (for new records).**

The screenshot displays the 'Parties (1) - New' window in the Butterfly Data Entry software. The interface includes a top menu bar with 'File', 'Home', 'Edit', 'View', 'Tools', and 'Parties'. Below this is a ribbon with icons for 'New Record', 'Save Record', 'Cancel', 'Previous', 'New', 'Additional', 'View', 'Sort', 'Reports', and 'Check Spelling'. The left sidebar shows 'Person' as the selected tab. The main form area contains the following sections:

- Party Type:** A dropdown menu with 'Person' selected.
- Language:** Fields for 'Primary' and 'Dialect'.
- Person Details:** Fields for 'Title', 'First', 'Middle', 'Last', 'Suffix', and 'Other Names'.
- Derived Names:** Fields for 'Automatic' (radio buttons for 'Yes' and 'No'), 'Salutation', 'Full', 'Brief', 'Cited', and 'Taxonomic'.
- Gender:** Radio buttons for 'Female', 'Male', and 'Unknown' (selected).
- Source of Information:** A text field.

The status bar at the bottom indicates 'New', 'Party 1 of 1', 'colby', 'Butterfly Data Entry', and 'emumpm'.

The Person tab lookup lists are not used. Do not try to press the lookup list button to see terms, simply carefully type the term in the field.

A. Party Type

Enter the type of party record for the person. You will enter "Person".

This is a lookup list field.

B. First

Enter the first name or initial for the person.

C. Middle

Enter the middle name or initial for the person.

D. Last

Enter the last name for the person.

E. Gender

Enter the gender for the person. If you can't tell the gender by the name, then keep this as the default of "Unknown".

XXII. Parties module, Organization tab

****Make sure you have the LEPNET default set in the Parties module (for new records).**

The screenshot shows the 'Parties (1) - New' window. The top menu bar includes File, Home, Edit, View, Tools, and Parties. The ribbon below has icons for New Record, Save Record, Cancel, Previous, New, Additional, View, Sort, Reports, and Check Spelling. The left sidebar has 'Person' selected under 'Person' and 'Roles', 'Notes', 'Security', and 'Admin' under 'Shortcuts'. The main form area has a title bar 'Parties (1) - New' and a search bar with '45730'. The form sections are: Party Type (Person), Language (Primary, Dialect), Person Details (Title, First, Middle, Last, Suffix, Other Names), Derived Names (Automatic: Yes/No, Salutation, Full, Brief, Cited, Taxonomic), Gender (Female, Male, Unknown), and Source of Information. The bottom status bar shows 'New Party 1 of 1' and users 'colby', 'Butterfly Data Entry', and 'emumpm'.

A. Party Type

Enter the type of party record for the collector. You will enter “Organization”.

This is a lookup list field.

B. Organisation

Enter the name of the organization.

C. Department

Enter the department of the organization. This information is rare on labels.

XXIII. Parties module, Roles tab

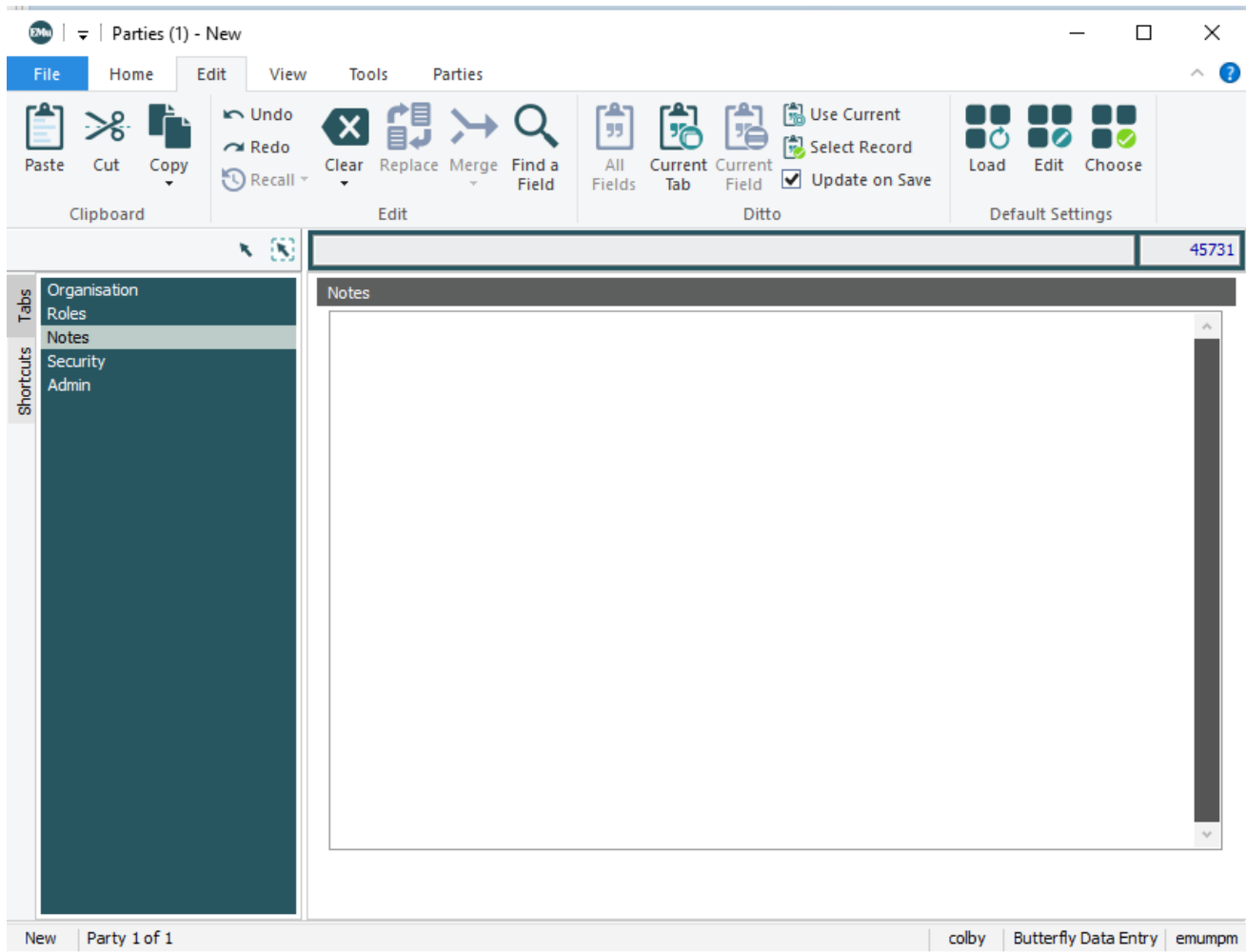
The screenshot displays the Butterfly Data Entry software interface. The title bar indicates 'Parties (1) - New'. The menu bar includes File, Home, Edit, View, Tools, and Parties. The ribbon contains several groups of icons: Clipboard (Paste, Cut, Copy), Edit (Undo, Redo, Recall, Clear, Replace, Merge, Find a Field), Ditto (All Fields, Current Tab, Current Field), and Default Settings (Load, Edit, Choose). A status bar at the top right shows the number '45731'. On the left, a sidebar lists 'Organisation', 'Roles', 'Notes', 'Security', and 'Admin'. The main area is titled 'Roles' and contains a single text input field with an asterisk (*) in the top left corner. The bottom status bar shows 'New', 'Party 1 of 1', 'colby', 'Butterfly Data Entry', and 'emumpm'.

A. Roles

Enter the role for the collector or determiner. You will enter “Scientific Collector” for a collector and “Scientific Determiner” for a determiner.

This is a lookup list field.

XXIV. Parties module, Notes tab



A. Notes

Enter any notes about the person or organization. If you have a data entry note about the party then enter the information like this example:

“NOTE: the collector name was hard to read on the label.” J. Colby 12/9/2016

If you make a note about data entry always sign your name (first initial and full last name) and enter the date the note was made.

This is a free-text field.

Appendix A. Metadata for Attributed Notes

Module	Attributed Note Type	Situation	Metadata Yes/ No	Maps to Darwin Core Field
Objects	Provenience	Collection was acquired from someone other than donor (e.g. Moeck collection)	Yes	Occurrence Remarks
Objects	Host Plant	Data about host plant or nectar plant	No	Associated Taxa
Collection events	Verbatim Event Time	Non-numerical time (e.g. ‘dawn” or “afternoon”	Yes	Event Remarks
Collection Events	Verbatim Collection Method	The accepted look up list term in Collection Method and the verbatim label data differ (e.g. Light vs blacklight	Yes	Event Remarks
Collection Events	Verbatim Event Date	Non-numerical date (e.g. “winter”). Dates given as just months or month day are entered in Verbatim Event date as well.	No	Verbatim Event Date
Collection Events	Verbatim Collector	Collector is listed but not named (e.g. Native collector, tribesman, boy)	Yes	Event Remarks
Sites	Location Remarks	A location is ambiguous (e.g. county road O or county road D; or a name listed on the label doesn’t match GNIS or TGN, e.g., Label reads Jordan’s River,. Jordan’s Creek exists, but Jordan’s River does not)	Yes	Location Remarks
Sites	Mapping remarks	remarks about (clarifications, verbatim notes, etc.) for the mapping.	Yes	Location Remarks
Sites	Verbatim Elevation	Typically used for circa or elevations where there is some ambiguity (hard to read, etc)	Yes	Location Remarks