

DIGIVOL

IS DIGIVOL SUITABLE FOR MY PROJECT?



March 2023

AUSTRALIAN MUSEUM

1 William Street Sydney

NSW 2010 Australia

T 61 2 9320 6000

Web: australian.museum



AUSTRALIAN MUSEUM

Is DigiVol suitable for my project?

Are you an institution with resources waiting to be unlocked and shared with the world? Do you have:

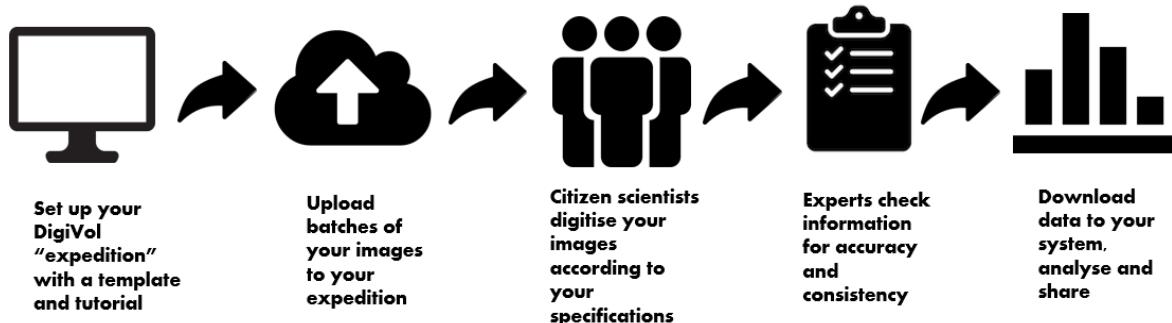
- Specimens in your herbarium or other collections waiting to be digitised?
- Shelves of field notes or historical documents gathering dust?
- Thousands of camera trap images which need processing?

Would you like to increase your educational reach by involving citizen scientists in your project? DigiVol may be able to help you to digitise your collections.

What is DigiVol?

[DigiVol](#) is a crowdsourcing transcription website that assists the Australian Museum and many institutions around the world to digitise and analyse their collections. Our citizen scientists transform your resources into a digital record, that can be shared online and used by researchers and scientists, making it an important task for the future of this data. DigiVol was developed by the Australian Museum in collaboration with the Atlas of Living Australia. The DigiVol website is www.digivol.org.

How does DigiVol work?



Types of DigiVol expeditions

There are many ways of extracting information or data from your images depending on what the end use will be. Your images must clearly show the information you want captured. DigiVol supports the following projects, known as “expeditions”:

Specimen Labels



Your specimen labels from your collections can be transcribed (or “typed out”) according to your own database requirement. You will need to organise images for upload to DigiVol.

Historical Notes



Your historical documents and handwritten field notebooks can be transcribed according to your own requirements. You will need to organise scans of your documents for upload to DigiVol.

Wildlife Spotter



Your camera trap images of wildlife can be tagged (categorised) or animals and their behaviours can be identified. You can then use this ecological data for your own analysis, research and/or on-ground action.

Who are our DigiVol citizen scientists?

Anybody can volunteer with DigiVol but we find that our citizen scientists are unique in that they have extreme patience, an eye for detail and tend to be well-educated (astonishingly, nearly 40% of our active volunteers have a post-graduate degree!). More than 80% of our volunteers reside in Australia but we encourage volunteers from all corners of the world. We strongly encourage you to engage your own networks to work on your expeditions, and you will have access to our 10,000 plus citizen scientists! DigiVol is a great way for your supporters to make a meaningful and tangible contribution to your project.

How much does it cost?

DigiVol is free for institutions to use, providing your expedition utilises an existing DigiVol template (fields may be added or removed). Development of a new functionality within a template will incur a cost that is negotiated between DigiVol and your institution. DigiVol has hosted more than 3000 expeditions so there is a good chance that what you need already exists.

How much of my time will be required?

The initial familiarisation and set up of your expeditions will take some investment of your time. After you have activated your expedition, you will need to moderate questions from volunteers on your expedition forum. The more comprehensive and clear your tutorial and tasks, the less questions you will have on the forum. You will also need to manage the validation of your data and export your data at the end of the project.

Data validation and accuracy

DigiVol has an inbuilt system for auto-validation of Wildlife Spotter expeditions. Where there is ambiguity and for Specimen Label and Historical Notes expeditions, you and/or your colleagues can validate the data or you can select some of your best DigiVol volunteers to assist you.

Data sharing

We encourage you to ensure that citizen science project data and metadata is made publicly available through online platforms such as the [Atlas of Living Australia](#) or [GBIF](#), and where possible results are shared in an accessible way and/or published in open-access format.

Acknowledgement and promotion

We ask that the appropriate acknowledgement is provided in media articles/publications that use DigiVol to capture data. We also request you inform DigiVol of any project outcomes/media articles/research papers as our citizen scientists love to hear how their contributions make a difference.

Next steps

If DigiVol sounds like it could add value to your project please:

1. Register at www.digivol.org. Click on the ‘Log in’ tab at the top. This short [video](#) will help you with registration and login. Familiarise yourself with the DigiVol platform and submit some transcription tasks to confirm that DigiVol is for you.

2. Contact us to discuss your project requirements further:

DigiVol Online Coordinator
Digital Collections and Citizen Science
Australian Museum Research Institute
Australian Museum
1 William Street Sydney NSW 2010 Australia
Email: digivol@australian.museum

DIGIVOL

STEP 1: CREATE YOUR EXPEDITION – SPECIMENS



June 2023

AUSTRALIAN MUSEUM

1 William Street Sydney
NSW 2010 Australia

T 61 2 9320 6000
australianmuseum.net.au



Table of Contents

1	Introduction	4
	Checklist of key actions to create your DigiVol expedition	6
2	Getting started	8
2.1	Admin access	8
2.2	DigiVol test site	8
2.3	DigiVol live site	9
2.4	Admin tool	9
2.5	Expedition page	10
3	Templates	11
3.1	Compile a list of fields for your template	11
4	Manage Institution Page	12
4.1	Edit institution page	12
5	Create New Expedition	14
5.1	Expedition institution	14
5.2	Expedition details	14
6	Edit Expedition via Settings	16
6.1	General Settings	16
6.2	Expedition image	18
6.3	Expedition background image	19
6.4	Picklists	19
6.5	Tasks	20
6.6	Map	20
6.7	Tutorial Info	20
7	Tutorial	21
7.1	Upload your tutorial	21
7.2	Link tutorial to expedition	22
8	Project Task Staging	23
8.1	Task image preparation	23
8.2	Upload Images	23
8.3	Upload datafile (Optional)	25
8.4	Configure columns (Optional)	25
8.5	Create tasks	26

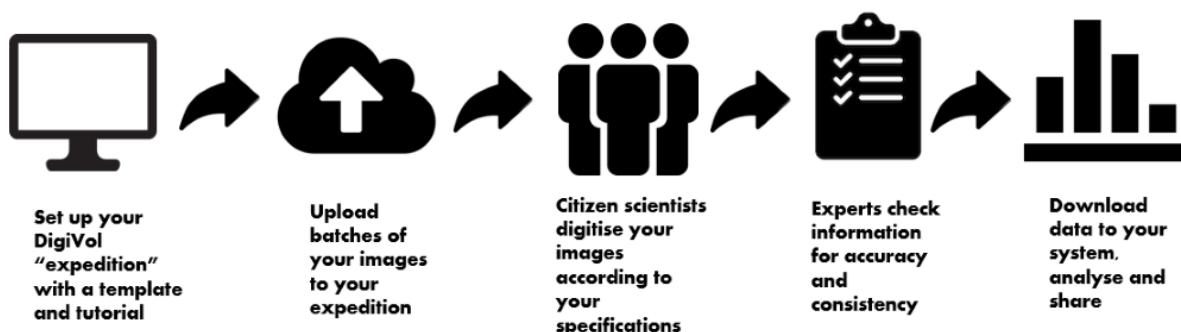


9	Test Your Expedition	27
9.1	Transcribe task	27
9.2	Validate task	27
9.3	Export data	28
10	Activate Your Expedition	29
10.1	Activate an expedition	29
10.2	Delete or deactivate an expedition	29
10.3	Next steps	29
11	Appendix – IrfanView - Resizing and Renaming Images	30
12	Appendix – Darwin Core	32
	Darwin Core terms commonly used with DigiVol	32
13	Appendix - Template Examples	33

1 Introduction

Welcome to DigiVol. We are delighted that you have chosen DigiVol to transcribe your images. You will be joining more than 70 Australian and international institutions who have used DigiVol for transcription and image classification of their collections. To date, DigiVol's 10,000 plus citizen scientists have transcribed and classified over five million items.

[DigiVol](#) citizen scientists participating in Specimens expeditions will help transform your specimen labels into a digital record by transcribing the information they contain. Capturing this data into a digital form will enable you to provide online digital access to your collections for reasons of public engagement, and encouraging, facilitating and conducting research. The data can also be shared through biodiversity data sharing platforms such as [The Atlas of Living Australia](#) (ALA) and the [Global Biodiversity Information Facility](#) (GBIF).



DigiVol Specimens expeditions are also a highly effective way to engage citizen scientists enabling them to understand and appreciate our precious biodiversity, while making a meaningful contribution to biodiversity.

DigiVol has prepared step-by-step instructions to assist you to use the DigiVol platform to transcribe your resources via Specimens expeditions. The first step is to create your DigiVol expedition and upload your images. This guide, *Step 1: Create your expedition*, will help you to do this.

When you have created your expedition in DigiVol there are two further guides to help you manage and finalise your expedition:

- *Step 2: Manage your expedition*
- *Step 3: Finalise your expedition*



DIGIVOL

DigiVol was developed by the Australian Museum in collaboration with the Atlas of Living Australia. The DigiVol website is <https://volunteer.ala.org.au/>

We understand that creating your first expedition in DigiVol may appear daunting at first, but please be reassured that by carefully following the key actions on the next page you will have success. In addition, please do not hesitate to seek extra assistance and support from:

DigiVol Coordinator
Digital Collections and Citizen Science
Australian Museum Research Institute
Australian Museum
1 William Street Sydney NSW 2010 Australia

Email: digivol@australian.museum



Checklist of key actions to create your DigiVol expedition

Please use this list to tick off the steps as you complete them.

Note: **bold** text refers to terms that can be found in this guide via the Table of Contents.

- Step A:** Request **Admin access** from the DigiVol Coordinator
- Step B:** Liaise with the DigiVol Coordinator to develop your **Template** (i.e. the form which will be used by the volunteers to input the data). Please note, if your template requires customisation it may not be available in DigiVol Test.
- Step C:** Create a test expedition in the **DigiVol Test** site at digivol-test.ala.org.au/
 - Manage Institution page.** You will need:
 - Institution logo
 - Description of your institution
 - Contact details
 - Create a New Expedition.** You will need:
 - A name for your expedition
 - A long description of your expedition
 - To select a **Template** for your test expedition such as those in **13. Appendix** if your template is unavailable in DigiVol Test.
 - Upload an **Expedition image** and an **Expedition background image** to represent your project.
 - Upload up to 10 sample images to DigiVol Test, which will be used for the individual tasks in your test expedition (this is called **Project Task Staging**).
 - Transcribe** some sample tasks to ensure that everything is working as it should.
- Step D:** Create a **Tutorial** in PDF format and helpful web links to assist the volunteers with the transcription of your tasks.
- Step E:** Ask the DigiVol Coordinator to review your expedition in DigiVol Test and your tutorial.
- Step F:** Create your expedition in the live DigiVol site at <https://volunteer.ala.org.au/>.
NB: Please do not proceed to this point unless the DigiVol Coordinator has approved your work in DigiVol Test.

- Copy the information from your institution page and test expedition in **DigiVol Test** to the **Edit Institution page** and **Create a New Expedition** in the **DigiVol live site**.
- Select your **Template** – the DigiVol coordinator will specify which template you are to use. Do not select a random template and please do not try to create your own.
- Save your **Tutorial PDF**, with the correct naming convention, to the DigiVol live site.
- Ensure that you have established a **Link to your tutorial** from your expedition.
- Upload your collection of images to be used for individual tasks of your expedition (this is called **Project Task Staging**).



Step G: Test your expedition whilst it is still in an inactive state.

- Transcribe** some sample tasks to ensure that everything is working as it should.
- Validate** your sample data if you are not using auto-validation.
- Export** your sample data to ensure that the data suits your requirements.



Step H: Ask the DigiVol Coordinator to review and approve your expedition.



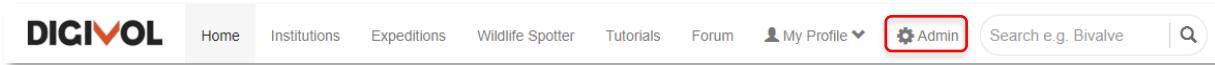
Step I: Activate your expedition!

2 Getting started

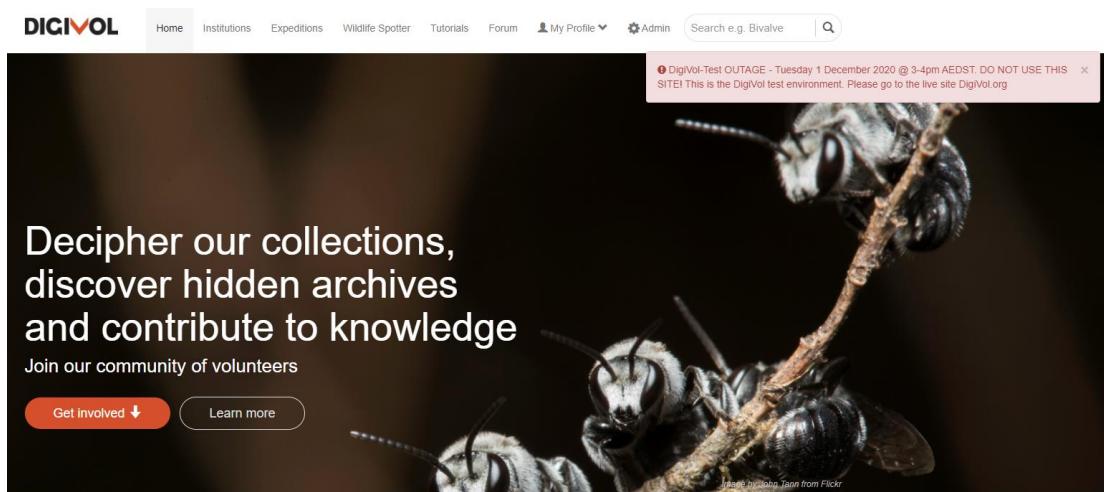
2.1 Admin access

Contact the DigiVol Coordinator (DigiVol@australian.museum) for access.

Once you have been granted Admin access you will be able to see the **Admin** tab when you log in.



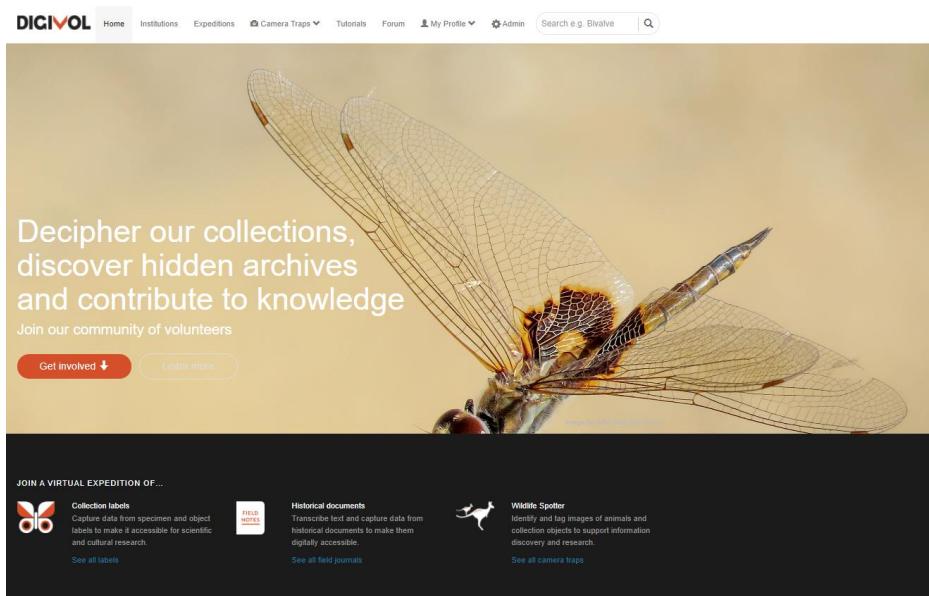
2.2 DigiVol test site



The DigiVol Coordinator will give you Admin access to the DigiVol back-room website, called DigiVol Test at <http://digivol-test.ala.org.au/>. DigiVol Test has the look-and-feel of the live DigiVol site, but it is not accessible to the public. Initially you will use DigiVol Test to improve your skills, build test expeditions, and make mistakes. Use a small sample of images on DigiVol Test as it takes time to load tasks and they are not automatically transferred to the live site.

Note: Expeditions created in DigiVol Test will not be transferred to the live site.

2.3 DigiVol live site



The live DigiVol site is at www.digivol.org or <http://volunteer.ala.org.au/>. As an administrator, you will have access to the Admin pages of this site. After you have experimented in DigiVol Test and your test expedition has been approved by the DigiVol Coordinator you will be able to create your own expedition in the live DigiVol site. Your expeditions will only become publicly accessible after the DigiVol Coordinator has approved your expedition and you have activated it.

2.4 Admin tool



You will be referred to the Admin tool throughout this document when you are creating your expedition.

Go to the Admin tool by clicking the **Admin** tab in the top right of the DigiVol front page. Only users who are logged in as administrators will be able to see this tab. The **Admin** tab will take you to the Admin list of tools.

Tool	Description
Manage Institutions	Manage Institutions
Manage Expeditions	Download expedition images and remove from server, clone and edit expedition.
Create new Expedition	Create a new DigiVol Expedition
Templates	Manage expedition templates and their fields
Bulk manage Picklists	Allows modification to the values held in various picklists
Stats	Various Statistics (Experimental)
Tutorial Files	Manage tutorial files
Manage User Roles	Manage User Roles, such as validators and forum moderators.
Institution Messages	Create and send messages to volunteers of your institutions and expeditions.
Admin reports	Expedition Summary Report

2.5 Expedition page



Your expedition page can be found through the search function in the **Expedition** tab at the top of the DigiVol front page. Alternatively, you can search for your expedition via the **Institution** tab at the top of the DigiVol front page.

You will be referred to your expedition page throughout this document. After you have created your expedition, you can edit it through the expedition page by clicking on the **Settings** button. You can view what your volunteers will see when they transcribe a task by selecting the **Get Started** button. You can view the progress of your transcribed tasks via the **Admin** button.

The **View tutorial** button will open a pop-up menu that contains links to the tutorials you have linked to your expedition. If nothing appears, you will need to check your tutorials are linked properly in Expedition Settings. See the **Tutorials** section for more information.

Validate tasks will only be visible to Institution Admins and Expedition Admins, including volunteers who have been manually given validation permissions by you.

The names of the volunteers who have participated in the expedition will populate the space below-left of the expedition name. The number of tasks transcribed by each volunteer will also be shown and ranked by number.

Any Forum posts relating to the expedition will show up on the bottom-right, as well as a link to create a new Forum topic.

3 Templates

A template is the form or screen-view which will be used by the DigiVol volunteers to capture the information you want to extract from the transcription process. Please discuss your requirements with the DigiVol Coordinator. It is important to spend the time to design a good template for your expedition. A number of different example templates which might be suitable for your Specimens expedition are included in the Appendices. The DigiVol Coordinator will create a template to suit your needs. Please do not try to create a template yourself.

Please note, in some cases you may not be able to view your customised template in DigiVol Test (it will, however, be available in the live DigiVol site). When you are creating your test expedition in DigiVol Test, please use *AM specimen template* if your template is unavailable. This can be changed afterwards.

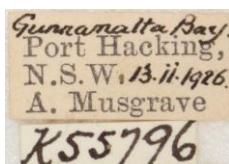
Never edit an existing template. Clone, rename and then edit the new template instead.

The clone button is 

3.1 Compile a list of fields for your template

Begin by compiling a list of fields to capture the data that you want to be transcribed from your specimen labels. Match these fields with a corresponding Darwin Core field. Darwin Core is a standard for managing natural history occurrence data, and is the accepted standard for naming data fields within the DigiVol. Further information about Darwin Core can be found in the Appendices.

The DigiVol templates are based on the Darwin Core fields and they will appear in the CSV file of data that you download after the transcription. For example, the fields that need to be captured in this specimen label below would be as shown in the table below. The mapping tool will also be added to be able to georeference the location on the labels.

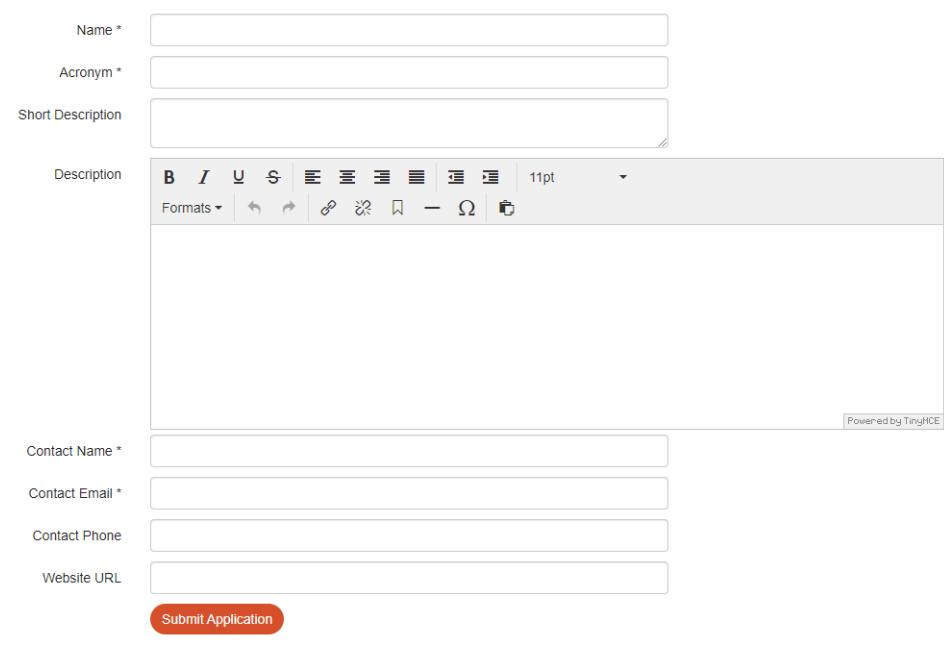


Darwin Core Field	Field
occurrenceRemarks	Transcribe All Text
eventDate	Date
recordedBy	Collector
recordedByID	Hidden field for picklist numbers
verbatimLocality	Locality
verbatimLocalityID	Hidden field for picklist numbers
stateProvince	State
country	Country
decimalLatitude	Latitude
decimalLongitude	Longitude
fieldNumber	Other Numbers
widgetPlaceholder	Mapping Tool

4 Manage Institution Page

The **Manage Institutions** button in the Admin tool lists and provides edit links to all institutions that you are an institution Admin of.

When you first join an Institution to DigiVol, you will see this blank form for you to complete:



A screenshot of a web-based application form for managing an institution. The form includes fields for Name, Acronym, Short Description, and a rich-text editor for Description. Below these are fields for Contact Name, Contact Email, Contact Phone, and Website URL, each with a red asterisk indicating it is required. A 'Submit Application' button is at the bottom. The rich-text editor toolbar includes bold, italic, underline, superscript, subscript, and other formatting options. A watermark 'Powered by TingICE' is visible in the background of the form area.

Name *	<input type="text"/>
Acronym *	<input type="text"/>
Short Description	<input type="text"/>
Description	<div style="border: 1px solid #ccc; padding: 5px;">B I U S Formats 11pt</div>
Contact Name *	<input type="text"/>
Contact Email *	<input type="text"/>
Contact Phone	<input type="text"/>
Website URL	<input type="text"/>

Submit Application

When you **Submit** your application, the DigiVol administrator will be notified and will accept or decline your application.

Any expeditions you add to DigiVol under your institution will be included in your institution page.

Your institution page will also show you the statistics and an honour board relating to the expeditions associated with your institution.

4.1 Edit institution page

Please review your institution page to ensure that it provides an accurate description of your institution. When referring to your institution in social media and e-newsletters, DigiVol will often use a link to this page so it is important that it captures your organisation.



You can edit your institution page by searching for your institution in the **Institutions** tab at the top of the DigiVol site.

Australian Museum Entomology Collection

The Australian Museum entomology collection contains mostly Australian species but there is a strong non-Australian representation of beetles, psocids (booklice), flies, butterflies and moths.

[See our expeditions ↓](#)
[⚙️ Settings](#)


Email	Paul Flemons
Phone	
Website	australianmuseum.net.au/Australian-Museum-Entomology-Collection

97% Validated

100% Transcribed

159945 Tasks

1 Expeditions Underway

148 Expeditions Completed

Select the **Settings** button and edit the form as required.

The Theme colour code (hex) field will let you choose the colour associated with your institution. The colour will appear as your expedition colours and the transcription status bar on your institution page, as well as expeditions associated with your institution. The theme below has the hex field changed to yellow.

The screenshot shows the Cockatoo Wingtags institution page. At the top, there's a navigation bar with links for Home, Institutions, Expeditions, Tutorials, Forum, Contact Us, My Profile, Admin, and a search bar. Below the navigation is a breadcrumb trail: Home > Institutions > Cockatoo Wingtags. The main content area features a large yellow header with the institution's name, "Cockatoo Wingtags". To the right of the name is a small image of a cockatoo's head. Below the header is a brief description of the research project. Further down are two buttons: "See our expeditions ↓" and "⚙️ Settings". To the right of these buttons is a contact information section with fields for Email (John Martin), Phone (9231 8058), and Website (cockatoo.wingtags.com/). At the bottom of the page is a progress bar and statistics: 8% Validated, 89% Transcribed, 8340 Tasks, 1 Expeditions Underway, and 6 Expeditions Completed.

4.1.1 Institution logo

To add a logo to your institution page, select the **Settings** button on your institution page.

The option to upload a logo appears at the bottom of the **General Settings** tab.

For best results, the image should be a centred square image between 200 x 150 pixels for width and height. The logo appears in the list of institutions and also on the institution home page.

If you are having problems deleting and changing any images on your page, you may have to force refresh your browser to make sure it does not cache your old image (Shift + F5).

5 Create New Expedition

**Before you create your first expedition
you must create your Institution Page**

The Create New Expedition Admin tool is used to create a new expedition. See the example below:

Create Expedition

Expedition Details

Fill out the following details for your new Expedition. Once you have created your expedition, you will be able to customise it with extra options, such as:

- Expedition and background images
- Map information
- Picklists
- Tutorial information

* denotes required information.

Expedition institution* [Institution Page](#)

Expedition name*

Short description

Long description

Powered by TinyMCE

Template*

Expedition type*

Create

5.1 Expedition institution

Select the name of your institution from the drop-down list. NB: You need to have created your institution page for your institution to appear in the list.

5.2 Expedition details

Fill in the form with the following expedition details:

Expedition Name - The name of your expedition will be displayed on your Expedition page and in the DigiVol expedition list.



Long description - The long description will appear on your Expedition page. It will also appear on the front page of DigiVol if your expedition is selected as the feature expedition. The name and description need to entice volunteers to your project. You may also include web links that may be of interest and/or assistance to transcribers. Do not copy and paste from a Word document into this field as the formatting is not supported, instead copy and paste from a text file.

Template – If your template is unavailable, choose the template called *AM specimen template* when creating your New Expedition. You can select a different template after you have created your expedition. See Template section for further information.

Expedition type - Choose “Specimens” from the drop-down menu.

Click **Create**.

Congratulations, you have created an expedition!!

Your expedition is currently inactive and is not publicly visible in the DigiVol expedition list. This means that you can add expedition images, tasks, tutorials and perform other fine-tuning behind-the-scenes. As an Admin, you can find your expedition through the search function on the Institution or the **Expedition** tab on the front page of the DigiVol website.

6 Edit Expedition via Settings

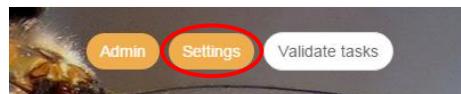
Hint: Find your expedition via the search function on the Expedition tab on the front page of the DigiVol website. Alternatively, all your expeditions are listed on your Institution page.

An expedition may be edited from either the DigiVol expedition list or your Expedition page by clicking on the **Settings** button. You must be logged in as an Administrator to see the **Settings** button. Notice that inactive expeditions are greyed out for easy differentiation.

DigiVol expedition list:



Expedition front page:



6.1 General Settings

- > General Settings
- > Expedition image
- > Expedition background image
- > Picklists
- > Tasks
- > Map
- > Tutorial Info

Australian Museum Lady Beetle Expedition - General Settings

Actions

Expedition institution	Australian Museum Entomology Collection	Institution Page
Expedition name	Australian Museum Lady Beetle Expedition	
Short description	Australian Museum Lady Beetle Expedition	
Long description	<p>The members of the beetle family Coccinellidae are better known as lady beetles, ladybirds, ladybird beetles or ladybugs. Biologically speaking, "ladybug" is a misnomer as these animals are beetles (Coleoptera) not true bugs (Hemiptera). Lady beetle larvae look quite different to their adult form and are often covered in fleshy spikes. Most lady beetles are a boon to your garden as both larvae and adults are voracious predators of pest insects like aphids and thrips, and some species feed on black mould and other fungi. Most species in this expedition do not have the bright, aposematic colours that we notice day-to-day, instead they are more subtle and many are covered in fine, tiny hairs! Take a look and help us transcribe these little beetles.</p>	
Template	AM specimen template (Current)	
Expedition type	Specimens	
Tags	<input type="text"/> Australia Entomology	
<input type="checkbox"/> Enable buttons to share images from this project to social networks <input type="checkbox"/> Data from this expedition should be harvested by the Atlas of Living Australia <input type="checkbox"/> EXIF data from staged images should be included in project exports		
Update		

6.1.1 Expedition name

The name of your expedition will be displayed on your Expedition page and in the DigiVol expedition list.

6.1.2 Long description

The long description will appear on your Expedition page. It will also appear on the front page of DigiVol if your expedition is selected as the feature expedition. The name and description need to entice volunteers to your project. You may also include web links that may be of interest and/or assistance to transcribers. Do not copy and paste from a Word document into this field as the formatting is not supported, instead copy and paste from a text file.

6.1.3 Template

The DigiVol Coordinator will tell you which template to use. If you are unsure, please start with *AM specimen template*. You can select a different template at a later time (but before you activate your expedition). See Template section for further information.

6.1.4 Expedition Type

Choose “Specimens” from the drop-down menu.

6.1.5 Tags

Tags are associated with the transcriber achievement badges. Please add tags for the volunteers to receive badges associated with your expedition. A list will drop down as you type to show matching tags. Choose from the list then add more as required. If it is not in the list, then it will not be added as a tag. If you cannot find a tag that suits your expedition, please contact the DigiVol Coordinator.

6.1.6 Additional checkboxes (ALA data harvest, EXIF data and image sharing)

Enable buttons to share images from this project to social networks - Tick the box to enable buttons to share images to social networks.

Data from this expedition should be harvested by Atlas of Living Australia – Untick this box if you do not want your data to be harvested by ALA.

If you do not want your data to be harvested by the
Atlas of Living Australia, untick the box here.

EXIF data from staged images should be included in project exports – Tick this box if you want the EXIF data from the images to be extracted and inserted into the export CSV file.

Change any field on the General Settings page and click the **Update** button.

6.2 Expedition image

Australian Museum Longhorn Beetles 1 Expedition - Expedition image

For best results and to preserve quality, it is recommended that the expedition image aspect ratio sits anywhere between 3:2 and 4:3 with a minimum of 600px width.

Image Katja Schulz - Flickr

Expedition Image Browse

Image copyright text
Katja Schulz - Flickr

Update

Expedition image - The expedition image appears on the DigiVol expedition list and on DigiVol's front page if the expedition is the feature expedition. Click on **Browse** and select your image.

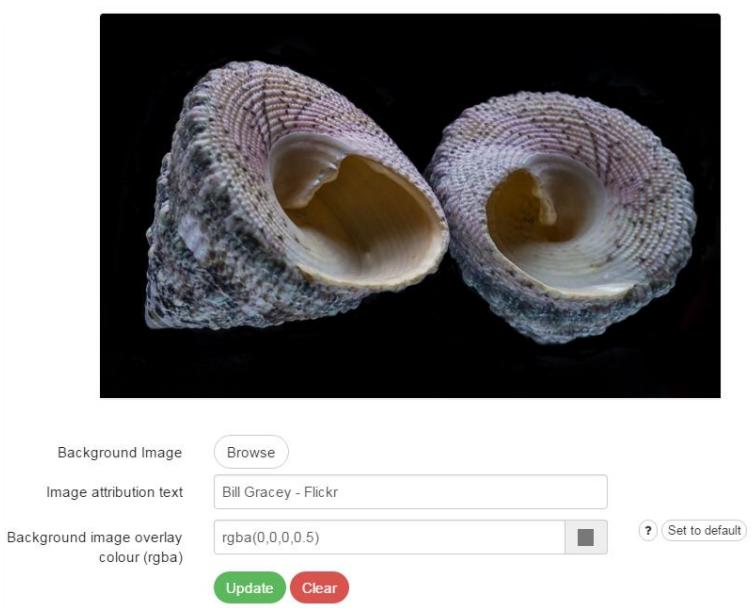
The expedition image needs to be a JPG image file. For best results and to preserve quality, it is recommended that the expedition image aspect ratio sits anywhere between 3:2 and 4:3 with a minimum of 600 pixels in size. Image editing software such as Adobe Photoshop or IrfanView (see Appendix for instructions) can be used for this step.

Image copyright text - The creator or owner of the expedition image, who has exclusive rights to its use and distribution.

Click on **Update** to accept any changes you have made.

Hint: If you are having trouble loading a new image there may be a caching issue. Try refreshing the page or keying Shift + F5.

6.3 Expedition background image



Background image – The expedition background image appears on your Expedition page. Click on **Browse**.

The expedition background image needs to be a JPG image file. For best results and to preserve quality, it is recommended that the background image has a resolution of at least 2 megapixels (eg. 1920 x 1080). The system will not accept images bigger than 512KB.

Image attribution text - The creator or owner of the expedition background image, who has exclusive rights to its use and distribution.

Background image overlay colour (rgba) - The image works best if it is dark so that the expedition description can be seen on the darker background. Click on the **Set to default** button to make your image darker. You can then tweak the settings as necessary.

Images may be removed at any time by clicking the **Clear** button.

Hint: If you are having trouble loading a new image there may be a caching issue. Try refreshing the page or keying Shift + F5.

Click on **Update** to accept any changes you have made.

6.4 Picklists

Picklists are used to give the transcriber a controlled or optional vocabulary by allowing them to choose from a drop-down menu when they complete tasks. For example, a picklist could be a list of countries or scientific names.

Please refer to the guide *Step 1b Create your expedition – Bulk manage picklists (Optional)* to create picklists in your Specimens expedition, or contact the DigiVol Coordinator if you need further assistance.

6.5 Tasks

The Tasks page is used to create and manage expedition tasks. Each task will have an image associated with it. See section on Project Task Staging for further information.

6.6 Map

The map can be used on the front page of your expedition to show transcribers the location of transcribed records in the expedition. The map uses the latitude and longitude fields in the template to map the locations.

If you would like the map to appear on the front page of your expedition select 'yes' next to **Show the map on the expedition front page**.

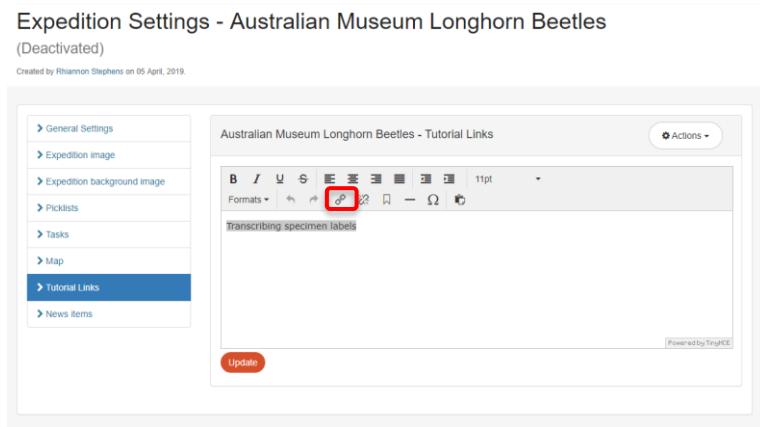
You may centre and zoom the map on a specific location by dragging and positioning the map to show a particular location. The higher the Zoom number, the closer the map will be.

Click **Update** to continue.

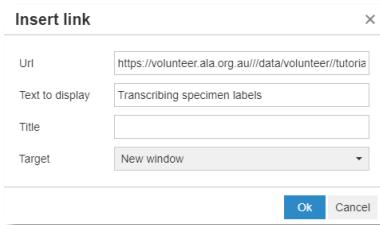
6.7 Tutorial Info

Hint: You will need to upload your tutorial via the Tutorial Files button in Admin tools before you create your tutorial link. See Tutorial section for further information.

To add a link to your tutorial, type the title of your tutorial in the Tutorial Links text box, highlight it and click on the **chain** icon.



Open your tutorial in another webpage via the Tutorials tab on the front page of DigiVol. Copy your tutorial weblink into the 'URL' field.



Choose the Target drop-down list to be 'New Window'.

Click on the **OK** button.

Click on the **Update** button to add the link to your Expedition.

7 Tutorial

Each expedition should be accompanied by a tutorial which clearly explains how you would like tasks to be completed. Well written tutorials which address common problems will result in less questions to the DigiVol forum (and therefore less of your time!) and consistent and high quality data. Please ask the DigiVol Coordinator to review your draft tutorial before you upload it to DigiVol.

All tutorials appear on the Tutorial tab.

7.1 Upload your tutorial

The **Tutorial files** in the Admin tab is used to add a tutorial for your expedition.

Name	Link	Actions
ALA_US Abbreviations.pdf	http://volunteer.ala.org.au/data/volunteer/tutorials/ALA_US Abbreviations.pdf	Rename Delete
NZAC specimen Tutorial-Slides.pdf	http://volunteer.ala.org.au/data/volunteer/tutorials/NZAC specimen Tutorial-Slides.pdf	Rename Delete
ANIC Tutorials_ANIC Bees Supplement.pdf	http://volunteer.ala.org.au/data/volunteer/tutorials/ANIC Tutorials_ANIC Bees Supplement.pdf	Rename Delete
ANIC Tutorials_ANIC Orphans.pdf	http://volunteer.ala.org.au/data/volunteer/tutorials/ANIC Tutorials_ANIC Orphans.pdf	Rename Delete
NZAC specimen Tutorial.pdf	http://volunteer.ala.org.au/data/volunteer/tutorials/NZAC specimen Tutorial.pdf	Rename Delete
DigiVol Administration_Admin Manual June 2015.pdf	http://volunteer.ala.org.au/data/volunteer/tutorials/DigiVol Administration_Admin Manual June 2015.pdf	Rename Delete
Museum Victoria Tutorials_Berney Nature Diaries.pdf	http://volunteer.ala.org.au/data/volunteer/tutorials/Museum Victoria Tutorials_Berney Nature Diaries.pdf	Rename Delete
SANBI SAFARIS_FieldNotesTutorial03.pdf	http://volunteer.ala.org.au/data/volunteer/tutorials/SANBI SAFARIS_FieldNotesTutorial03.pdf	Rename Delete
Museum Victoria Tutorials_Graham Brown master list of place names.pdf	http://volunteer.ala.org.au/data/volunteer/tutorials/Museum Victoria Tutorials_Graham Brown master list of place names.pdf	Rename Delete

To upload a new tutorial, click on the **Browse** button, find the file that you want in your directory, and then click the **Upload** button. You can also delete or rename tutorials that were previously uploaded, by clicking on the **Rename** or **Delete** button next to the tutorial in the list.

Your tutorial file will be available on the publicly accessible Tutorials page, which is reached through the Tutorials tab on the front page of DigiVol.

7.1.1 Tutorial file names

It is important that you use the correct naming convention when uploading your tutorial so that it appears in the correct format on the **Tutorials** tab of the DigiVol website. Please use the following naming convention:

- **Institution Name_Tutorial Name.pdf**

A tutorial with a filename of 'Australian Museum Tutorials_Transcribing Specimen Labels.pdf' will appear as follows:

Australian Museum Tutorials
A Guide to Entomology Collectors
Kershaw Diaries Supplement
Malacology Supplement
Mapping Tool Tutorial
Ship Names
Transcribing Field Notes
Transcribing Specimen Labels
Validating specimen labels May 2015

7.2 Link tutorial to expedition

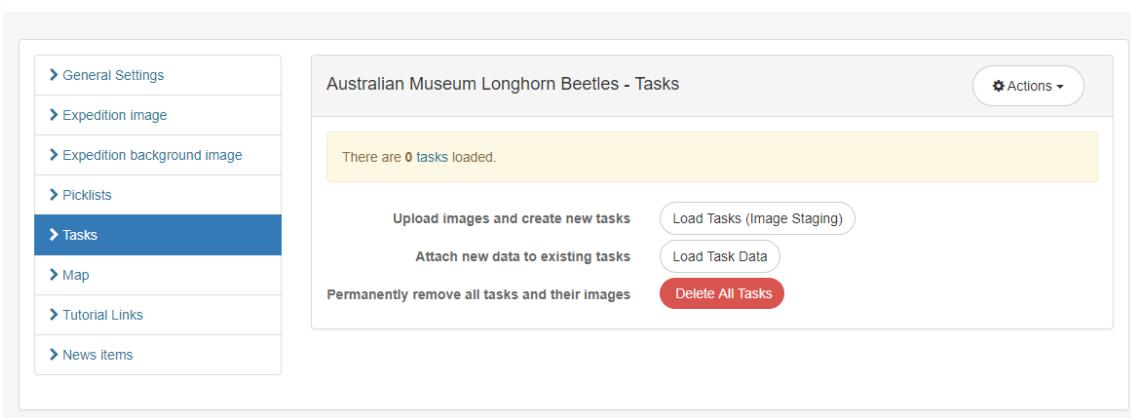
To link your tutorial to your expedition, see section **6.7 Tutorial info** for further information.

8 Project Task Staging

Expedition Settings - Australian Museum Longhorn Beetles

(Deactivated)

Created by Rhiannon Stephens on 05 April, 2019.



Each task in your expedition will have an image associated with it. To upload images, go to the **Settings** button on your Expedition page and select **Tasks**.

8.1 Task image preparation

Images may need to be resized and renamed. Images should be JPGs and should be around 1 to 2 MB (max) in size. It is also good practice to name the images so that it is evident which project to which they belong. Image editing software such as Adobe Photoshop or IrfanView (see Appendix for instructions) can be used to resize and rename a batch of images.

8.2 Upload Images

Uploading of images is done in batches of 200. All files are held in a staging area where images and their associated text files are organised. From this staging area, fields for each task can also be pre-loaded with data, if required. Once all images and associated data are staged, they are ready to be uploaded to create the tasks.

Expeditions can have as many images as you like, although we recommend a maximum of 3000 images to maximise engagement. You should prepare your images so that they are all ready for upload at one time. **Never add images to a completed project.**

If you are uploading a large number of images, we ask that you upload them after business hours (AEST) to reduce the load on the system when large numbers of volunteers may be using the DigiVol platform.

From the Expedition Settings Tasks page select **Load Tasks (Image Staging)**. A four-step process (two optional) will be shown.

Project Task Staging

(1) Upload Images

Upload your images to the staging area
In addition to task image files, you can also upload auxiliary data files that can contain additional data that should be attached to individual tasks (e.g. OCR text) [\(?\)](#)

[Select files](#)

(2) Upload datafile (Optional)

Upload a csv file containing extra data to attach to each task. This can also be used for prepopulating fields within your template.

[Upload data file](#)

(3) Configure columns (Optional)

Add and configure columns in the table below to pre-populate data in your tasks. [\(?\)](#)

[+ Add column](#)

(4) Create tasks

Review the staged images table, and create the tasks.

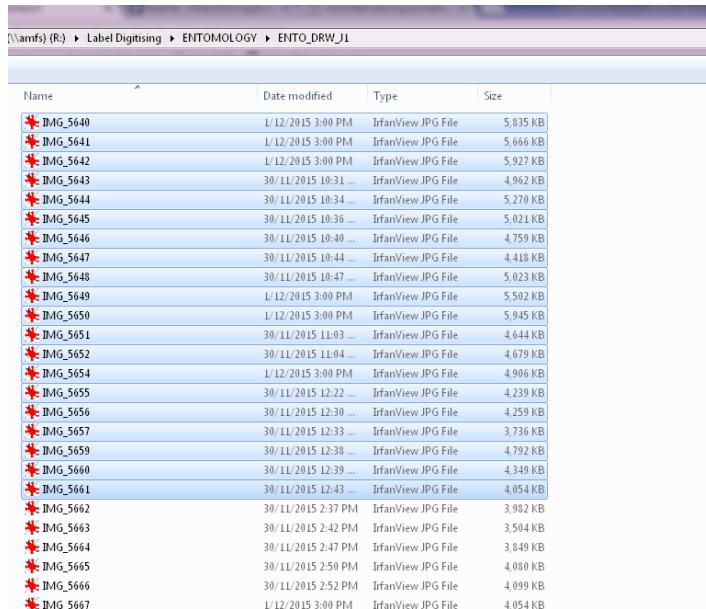
[Create tasks from staged images](#)

Staged images (0)

[Actions ▾](#)

Image file	externalidentifier (NameRegex: ^(.*)\$ - (?))

Click on the **Select files** button.



Highlight the image files and click on **Open**.

Your files will start to load to the staging area.

Project Task Staging

The screenshot shows the 'Project Task Staging' interface with four numbered steps:

- (1) Upload Images**: Upload your images to the staging area. In addition to task image files, you can also upload auxiliary data files that can contain additional data that should be attached to individual tasks (e.g. OCR text). Includes a 'Select files' button.
- (2) Upload datafile (Optional)**: Upload a csv file containing extra data to attach to each task. This can also be used for prepopulating fields within your template. Includes a 'Upload data file' button.
- (3) Configure columns (Optional)**: Add and configure columns in the table below to pre-populate data in your tasks. Includes a '+ Add column' button.
- (4) Create tasks**: Review the staged images table, and create the tasks. Includes a 'Create tasks from staged images' button.

Staged images (188)

Image file	externalIdentifier (NameRegex: ^[A-Z][A-Z0-9]*\$)	Actions
AM_ENTO_DRW_760_4001.jpg	AM_ENTO_DRW_760_4001.jpg	X
AM_ENTO_DRW_760_4002.jpg	AM_ENTO_DRW_760_4002.jpg	X
AM_ENTO_DRW_760_4003.jpg	AM_ENTO_DRW_760_4003.jpg	X
AM_ENTO_DRW_760_4004.jpg	AM_ENTO_DRW_760_4004.jpg	X
AM_ENTO_DRW_760_4005.jpg	AM_ENTO_DRW_760_4005.jpg	X
AM_ENTO_DRW_760_4006.jpg	AM_ENTO_DRW_760_4006.jpg	X
AM_ENTO_DRW_760_4007.jpg	AM_ENTO_DRW_760_4007.jpg	X
AM_ENTO_DRW_760_4008.jpg	AM_ENTO_DRW_760_4008.jpg	X

Your images have been uploaded once they appear on the 'Staged images' list. To add more images click on **Select files**. Repeat until all your files are loaded to the staging area.

8.3 Upload datafile (Optional)

You may have extra data that you would like to associate with each task. For example, images of typed words may have been converted to text using OCR and saved as a text file, or populating the Catalogue Number field with the specimen's registration number. This data may be loaded to the staging area the same way that the image files have been loaded. It must be done *before* you create tasks from staged images.

Further information is available in a guide called *Step 1a Create your expedition - Associating extra data with your tasks (optional)*.

8.4 Configure columns (Optional)

This step will match the names of the columns of your uploaded CSV data file to the field names in your template. It must be done *before* you create tasks from staged images.

Further information is available in a guide called *Step 1a Create your expedition - Associating extra data with your tasks (optional)*.

8.5 Create tasks

Once you have uploaded your images to the staging area and added any text files or optional data, the tasks for your expedition are ready to be created. If you have a large number of tasks (2000 and above) this is the point we recommend waiting until outside business hours as the more tasks that are uploading, the larger the strain on DigiVol's active resources.

Click on **Create tasks from staged images** button.

The Task Loading Progress page will give details on how many tasks are still to upload, the time the tasks started uploading, the estimated completion time and whether there have been any errors. If you experience errors, you could try decreasing the filename length (and re-uploading) or checking all your images are in JPG format. If you continue to experience errors, contact the DigiVol Coordinator.

Staged tasks are loaded in batches of 200 at a time and share a queue with all other projects. If there are other projects loading at the same time you may not see any progress on your project for a while.

Task load progress	
Queued tasks remaining	0
Time started	
Estimated time of completion	All tasks loaded
Tasks being retried	0
Errors	0

[Back to settings](#)

When complete, the time of completion will be replaced with “All tasks loaded”. Return to your expedition settings by clicking “Back to settings”.

Hint: Check that the correct number of tasks are in your expedition. This can be done by checking your Expedition page. Before activating your expedition, it is possible to add more images in multiple staging events.

9 Test Your Expedition

Before finalising your expedition, it is important to fully test the workflow to ensure that the data generated by the DigiVol volunteers will suit your requirements. You should transcribe and validate some tasks and then download the data.

Further information about validating and exporting data can be found in *Step 2: Manage your DigiVol expedition* and *Step 3: Finalise your DigiVol expedition*, however, the information you need for now is included below.

9.1 Transcribe task



Click on the **Get Started** button and submit some tasks as if you were a DigiVol volunteer.

9.2 Validate task

You are responsible for validating your expedition's tasks for accuracy and consistency.

On your Expedition page, click the **Validate tasks** button (please note, this button can only be seen by those with validator status). If you cannot see the **Validate tasks** button you can validate tasks through the **Admin** button.



This will bring up a list of the tasks in your expedition. Click on the **Validate** button next to a task which will bring up the task with the transcriber's work. Check this work for accuracy and consistency and make any corrections in the necessary fields. Then click the **Mark as valid** button.

9.3 Export data

Before activating your expedition, you should fully test how the data will ‘look’ when it is exported from DigiVol.

Your data can be downloaded from DigiVol as a CSV file. To download your data, go to your Expedition page and click on the **Admin** button.

Select Export all, Export transcribed, or Export validated to download those tasks.

The dialogue box gives you a choice of a single CSV file, or a ZIP file of multiple CSV files. If unsure, leave the default “Single de-normalised CSV file” checked, and click on the Export button.

A CSV file (or a ZIP file of multiple CSV files) will be prepared and download to your computer. This CSV file can be opened in Excel, or viewed with a text editor like Notepad. Column headers of your CSV file will have [Darwin Core terms](#) where applicable. Data in the CSV file will include not only the transcribed text for each task, but also the name of the task transcriber and the name of the task validator together with any comments that they may have added. The downloaded CSV file is in Unicode (UTF-8) format, so if you open it directly into Excel, some of the symbols may not appear properly (for example gender symbols appear as â™€ instead of ♀).

After you have downloaded some sample data, ensure that it meets your requirements and determine your workflow for how you will use the data after it has been processed through DigiVol. Will you import the data into one of your existing databases or systems? Does it work for you? Do you need to tweak anything before activating your expedition?

10 Activate Your Expedition

Mark your expedition as active after you have loaded your tasks, fully tested your expedition and are ready for volunteers to start transcribing. Remember that volunteers can only transcribe expeditions loaded into the live DigiVol site.

Please do not activate your expedition until the DigiVol Coordinator has reviewed and approved your expedition.

10.1 Activate an expedition

On the **General Settings** page, select the **Actions** button near the top right of the page.

Australian Museum Gastropod 22 Expedition - General Settings

Expedition institution: Australian Museum Malacology Collection

Expedition name: Australian Museum Gastropod 22 Expedition

Short description: Australian Museum Gastropod 22 Expedition

Long description:

The class Gastropoda includes snails and slugs of all kinds and all sizes from microscopic to large. There are many thousands of species of sea snails and sea slugs, as well as freshwater snails, freshwater limpets, land snails and land slugs. They are a highly diversified class and their anatomy, behaviour, feeding and

Actions

- Activate expedition
- Delete expedition

Select **Activate expedition**. Your expedition will appear on the front page of the DigiVol website and volunteers can now start transcribing your tasks. Congratulations!!

10.2 Delete or deactivate an expedition

Deleting an expedition will remove it completely. Note that a completed expedition can be disabled and does not need to be deleted.

On the **General Settings** page, select the **Actions** button near the top right of the page. Notice that “Activate” has now changed to “Deactivate”. Click on **Deactivate expedition** to disable your expedition or **Delete expedition** to delete your expedition.

An expedition cannot be deleted if it has forum topics attached to it.

10.3 Next steps

Now that you have activated your expedition in DigiVol you are now ready for *Step 2: Manage your project*. Congratulations on making it this far!

11 Appendix – IrfanView - Resizing and Renaming Images

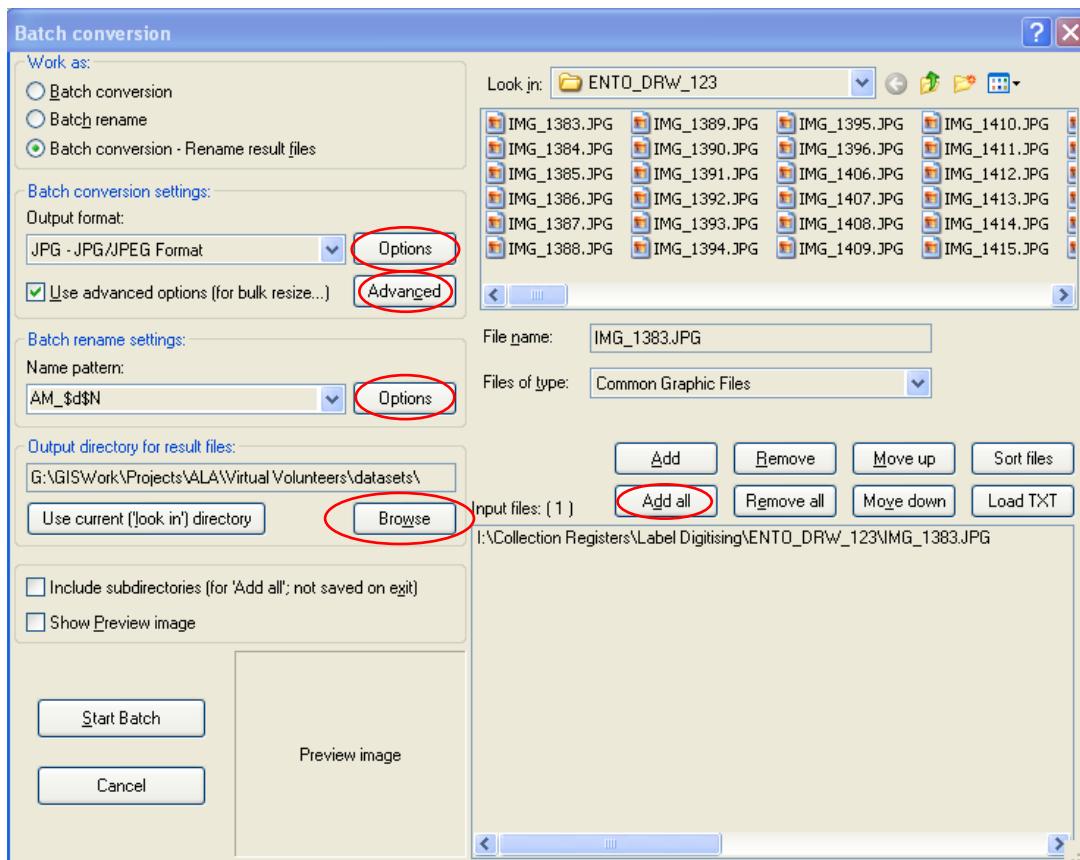
IrfanView is a free image display and manipulation tool for Windows: <http://www.irfanview.com/>

This is an example of using IrfanView batch conversion mode to resize and rename images.

To resize and rename the images start by creating a new folder in the network directory that is clearly distinguished from the original images. This folder is where the converted images will be stored separate to the original image files.

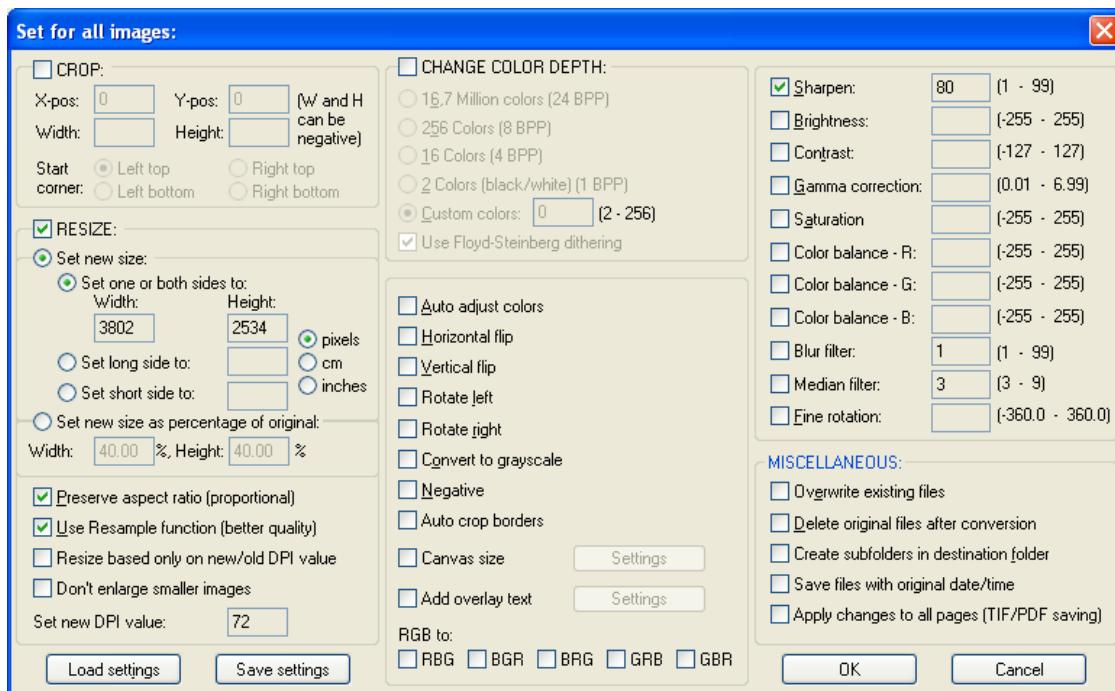
Try and resize the images to between 400 kB and 800 kB making sure the handwriting is clear and easy to read. Test a few images to determine their final size before the full batch.

Click on File → Batch conversion/rename and use the fields below as a guide.



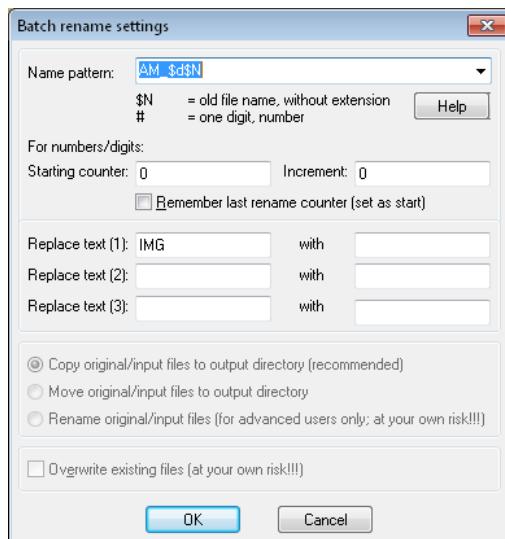
In the 'Batch conversion settings' section use the 'Advanced' option to resize the images to the following specifications:

- Set Width = 3802
- Set Height = 2534
- Preserve aspect ratio
- Use Resample function (better quality)
- DPI value 72
- Sharpen 80



In the 'Batch rename settings' section use the 'Options' - rename images to a format that will help to identify them at a later date:

- For example, AM_ENTO_DRW_127_0288.jpg (in this example the institution name is first, then the collection name, its location within the collection, and its image number). Do not use spaces in filenames, underscores (_) are acceptable.
- The following settings in the rename settings window give the filename format shown above. AM is the institute code, \$d includes the directory name, \$N includes the old file name (without the extension)



Click on Browse to change the 'Output directory for result files' to the folder that you have made previously for the converted files

Select the file(s) to be converted and click on **Add/Add all** to get your files into the 'Input files' field. Click on **Start Batch** to begin the conversion. When the batch conversion is complete click on **Exit batch**, or **Return to Batch** if you want to repeat the process.

12 Appendix – Darwin Core

- [Darwin Core Terms: A quick reference guide](#)
- [Darwin Core Standard](#)

Darwin Core, abbreviated as DwC, is a standard for managing natural history occurrence data, and is the accepted standard for naming data fields within the DigiVol.

Darwin Core was developed by the standards group, TDWG, and documentation is readily available through the TDWG website.

With a common standard, Darwin Core enables your data to be shared widely. For example, a registration number in one institution may be called a 'rego-number', and in another a 'cat-number'. If both data fields comply with the Darwin Core standard, 'catalogNumber', those values can be machine-managed and readily shared.

How Darwin Core standards work with DigiVol

Using the example of registration numbers: the registration numbers of your specimens might be stored as 'rego-number' in your database. When you pass this data to DigiVol as a CSV file, its column header will be 'rego-number'. DigiVol assigns your 'rego-number' to the Darwin Core term, 'catalogNumber', and is then able to manage it consistently. When it appears on your transcription task page, it will be given a human-readable label such as 'Catalogue No.'. After transcription is complete, you will download your transcribed tasks as a CSV file, and the column headers will have Darwin Core field names.

In general, all data fields used by DigiVol will need to comply with the Darwin Core standard.

Darwin Core terms commonly used with DigiVol

There are dozens of Darwin Core terms that cover more than you will generally encounter in a regular transcription project. This is a list of Darwin Core terms commonly used with DigiVol

Darwin Core term
stateProvince
typeStatus
institutionCode
recordedBy
coordinateUncertaintyInMeters
verbatimLocality
measurementUnit
samplingProtocol
measurementMethod
locality

13 Appendix - Template Examples

aerialObservationsTranscribe

This template has two sections. The field/s in the first section refer to text that is associated with the whole page, for example, the date or a species name. The second section has fields which can be repeated to form many rows.

← show previous journal page show next journal page → Rotate ↻

An error occurred getting the meta data for task image null! ×



Date ? Animal

1. Species No. Entries on page Size Conditions - water/weather Behaviour/Interaction
Verbatim Location

Add Row

1. Notes Record any comments here that may assist in validating this task Shrink
Your Notes

Submit for validation Save unfinished record Skip Create Forum Topic



singleSectionTranscribe

This template only has a single section. Any number of fields may be added.



Institution: ALA Project: NZAC specimen Preview (singleSectionTranscribe) Catalog Number: Taxa:

1. Details

NZAC Catalog Number	<input type="text"/>	Country	<input type="text"/>
2 Letter Region code	<input type="text"/>	Location(s)	<input type="text"/>
Date Collected	<input type="text"/>	Collector	<input type="text"/>
Latitude	<input type="text"/>	Longitude	<input type="text"/>
Elevation	<input type="text"/>	Habitat	<input type="text"/>
Collection Method	<input type="text"/>	Primary Identification (most recent)	<input type="text"/>
Determined by/Date	<input type="text"/>	Other identifications	<input type="text"/>
Sex	<input type="text"/>	Other text and numbers	<input type="text"/>

2. Notes Record any comments here that may assist in validating this task Shrink

Your Notes



smithsonianHerbariaSheetTranscribe

This template has 3 sections, 1. Museum details, 2. Collection details and 3. Location details. Fields within these sections can be changed.

An error occurred getting the meta data for task image null!



1. Museum details

Catalogue No.: Taxa: ?

Accepted Name ?
USNH Number ?
Cultivated ?
Sheet of (if noted) ?

2. Collection details

Collector(s) ?
 ?
 ?

Collector number ?
Collection Date
(from) DD MM Year ?
(to) DD MM Year ?

3. Location details

Verbatim Locality ?
State/Province/Territory ?
Country ?
Elevation ?
Verbatim Latitude ?
Verbatim Longitude ?

4. Notes Record any comments here that may assist in validating this task

Your Notes



threeColumnLabelTranscribe

This template has 3 sections, 1. Transcribe All Text, 2. Collection Location and 3. Miscellaneous. Fields within these sections can be changed.

Institution: ALA Project: AM specimen template Preview (threeColumnLabelTranscribe)

1. Transcribe All Text

2. Collection Location

Locality

State/Territory

Country

Latitude from label

D°M'S"
D M S

Longitude from label

D°M'S"
D M S

If the Latitude/Longitude do not appear on the label, find them using the mapping tool below

Find Lat/Long

Mapping tool

Decimal latitude

Decimal longitude

Coordinate uncertainty in metres

3. Miscellaneous

Catalog Number: 500

Taxa:

Collection date (from) DD MM Year
(to) DD MM Year

Collector

Collection Method

Elevation

Depth

Field/Other numbers

4. Notes Record any comments here that may assist in validating this task

Your Notes

Shrink

Submit for validation Save unfinished record Skip Create Forum Topic

Step 1a Create your expedition - Associating extra data with your tasks (optional)

Some image sets will have extra data that needs to be associated with each task. For example, images of typed words may have been converted to text using OCR and saved as a text file. This data may be loaded to the staging area the same way that the original files have been loaded.

1. Correctly name your data files

For your text file to be associated to the original file, the naming of your text files is critical.

Note about file naming of associated text files

Image filenames should be of the form: <filename>.jpg, for example: image01.jpg

Text filenames should match the following pattern:

<imagefilename>__<DwC field name>__<record index>.txt where:

<imagefilename> matches exactly the name of an image file already uploaded, including the file extension

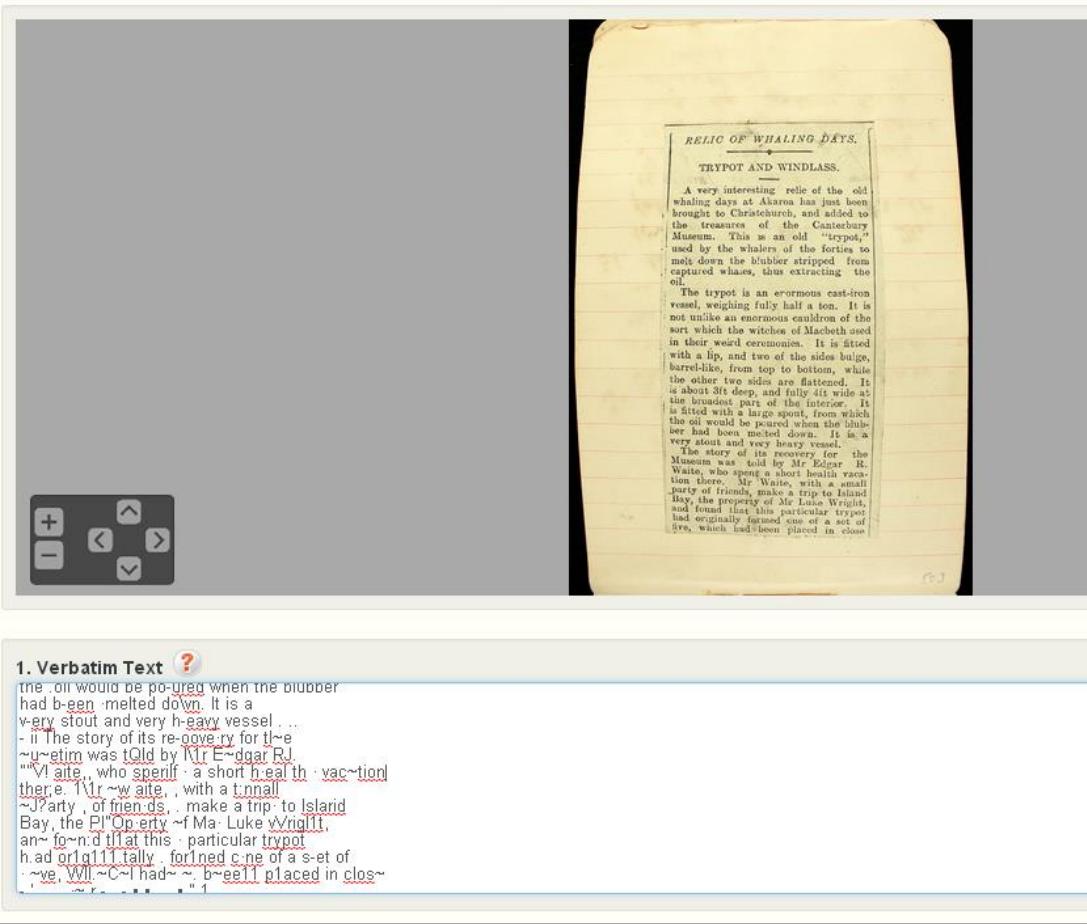
<DwC field name> is the name of the field which you want to be populated with the contents of the file

<record index> is the field index if the same field name can contain multiple values (defaults to 0 if omitted).

Important: '__' in the filename are two underscore characters

For Example, assuming an image file has been staged with the name image01.jpg:

The contents of image01.jpg__occurrenceRemarks__1.txt will populate the occurrenceRemarks field at index 1



In this example, OCR text of the image has been pre-loaded into the text box from an auxiliary text file, ready for a transcriber to correct.

Image filename: AM_Waite_AMS587_54_15661.jpg

Auxiliary text filename: AM_Waite_AMS587_54_15661.jpg_occurrenceRemarks_0.txt

Darwin Core field: occurrenceRemarks

In the template for this expedition, the field name occurrenceRemarks has the label 'Verbatim Text', which is the label given to the text box that a transcriber sees.

2 Upload data file (optional)

Loading a data file to your staged images lets you populate fields within each task with any known metadata. For example, populating the Catalogue Number field with the specimen's registration number.

Project Task Staging

The screenshot shows the 'Project Task Staging' interface. It consists of four numbered steps:

- 1 Upload Images: Upload your images to the staging area. In addition to task image files, you can also upload auxiliary data files that can contain additional data that should be attached to individual tasks (e.g. OCR text). [?](#)
- 2 Upload datafile (Optional): Upload a csv file containing extra data to attach to each task. This can also be used for prepopulating fields within your template. [?](#)
- 3 Configure columns (Optional): Add and configure columns in the table below to pre-populate data in your tasks. [?](#)
- 4 Create tasks: Review the staged images table, and create the tasks.

Below the steps is a table titled 'Staged images (0)'. It has one row with the following columns:

- Image file
- externalIdentifier
(NameRegex: ^(.*)\$ - [?](#))

A red box highlights the 'Upload data file' button in step 2. Other buttons include 'Select files', '+ Add column', 'Create tasks from staged images', and 'Actions'.

After you have staged your tasks, but before you have created the tasks, select the **Upload data file** button.

The screenshot shows the 'Upload a data file' dialog box. It includes the following elements:

- A title bar with the text 'Upload a data file' and a close button.
- An instruction 'Select a data file:' followed by a 'Browse' button.
- A list of CSV data file conventions:
 - First row should contain column headings (comma separated)
 - Column headers should be darwin core field names, except for the first one, which should be **filename**
 - Subsequent rows should contain the image filename in the first column, and optionally values for each field for the rest of the columns.
 - The image filename must match exactly a filename in the table, otherwise values will not be applied
 - Important!** There must be a column defined in the staged images section for each desired column name with a field type of **DataFileColumn**
- Two buttons at the bottom: 'Cancel' and 'Upload Data File' (highlighted with a red box).

Click on **Browse** button and select your CSV file.

Your CSV data file will need to have the following:

- The first row should contain column headings (comma separated)
- Column headers should be the field names of your data; the first column name should be 'filename'.
- Subsequent rows should contain the image filename in the first column, and optionally, values for each field for the rest of the columns of your data file.

The image filename must match exactly a filename in the staged images list, otherwise values will not be applied

Example of a CSV file:

File	Edit	Format	View	Help
Filename,catalogNumber,scientificName				
AM_ENTO_DRW_763_5088.jpg	K.45201	Lepidoptera		
AM_ENTO_DRW_763_5089.jpg	K.45202	Lepidoptera		
AM_ENTO_DRW_763_5090.jpg	K.45203	Lepidoptera		
AM_ENTO_DRW_763_5091.jpg	K.45204	Coleoptera		
AM_ENTO_DRW_763_5092.jpg	K.45205	Lepidoptera		
AM_ENTO_DRW_763_5093.jpg	K.45206	Diptera		
AM_ENTO_DRW_763_5094.jpg	K.45207	Coleoptera		
AM_ENTO_DRW_763_5095.jpg	K.45208	Lepidoptera		
AM_ENTO_DRW_763_5096.jpg	K.45209	Lepidoptera		
AM_ENTO_DRW_763_5097.jpg	K.45210	Lepidoptera		
AM_ENTO_DRW_763_5098.jpg	K.45211	Hymenoptera		
AM_ENTO_DRW_763_5100.jpg	K.45212	Hymenoptera		

In this example, the first line holds the column headers 'filename', 'catalogNumber' and 'scientificName'. Each subsequent line holds an image filename and its registration number and scientific name separated by a comma.

Click on **Upload Data File**

In the staging area a **Clear data file** button has appeared. This allows you to remove the uploaded data file, and reload if required. The image file name will be automatically added to the 'externalIdentifier' column as 'NameRegex'. This does not need to be edited.

Now that your data file has been loaded you need to configure the column names.

3 Configure columns (Optional) – Must be done after Step 2

This step will match the names of the columns of your uploaded CSV data file to the field names in your template. This is done one column at a time, with the matched column being shown in the staged images list. Adding a column will pre-load data for that field into your task.

Select the **+ Add column** button.

Add field definition

Field type	DataFileColumn	?
Column (leave blank to use field name)	catalogNumber	
Field name	catalogNumber	
Index (optional)		
	Cancel	Save

Field type - DataFileColumn if you have uploaded a datafile. This will load in the column names in your datafile into the **Column** drop down list below.

If your data needs to be in a particular order (for example diary or field note pages or you need the filmstrip in the camera trap template to work) choose field type sequenceNumber from this list and change the Field name, see below.

Column - A drop-down list will contain the column headings in the CSV data file that you uploaded in the previous step. Choose one of the column headings from the drop-down list. (If you chose sequenceNumber above, then **Column** will not be available).

Field name - This drop-down list contains all the Darwin Core fields that are in your template. If your uploaded CSV file has Darwin Core field names, then the Field name will be automatically filled in for you. Otherwise choose a Darwin Core field that corresponds to the column selected above from your CSV data file.

If you chose field type sequenceNumber , then select the Darwin Core field from your template that will contain the sequence number (eg sequenceNumber).

Index - Only fill in this box if you have more than one field with the same Darwin Core field name. Use an integer and start with 0. If you are unsure, leave this box blank.

Click on **Save**. Repeat for as many columns as you wish to configure.

Project Task Staging

The screenshot shows the 'Project Task Staging' interface with four numbered steps:

- 1 Upload Images**: Upload your images to the staging area. In addition to task image files, you can also upload auxiliary data files that can contain additional data that should be attached to individual tasks (e.g. OCR text). Buttons: Select files, Clear data file, View data file.
- 2 Upload datafile (Optional)**: Upload a csv file containing extra data to attach to each task. This can also be used for prepopulating fields within your template. Buttons: + Add column, Create tasks from staged images.
- 3 Configure columns (Optional)**: Add and configure columns in the table below to pre-populate data in your tasks. Buttons: Actions ▾.
- 4 Create tasks**: Review the staged images table, and create the tasks.

Staged images (975)

Image file	externalIdentifier (NameRegex: ^(.*)\$ - <input checked="" type="button"/> <input)<="" th="" type="button" value="X"/> <th>catalogNumber (DataFileColumn: catalogNumber - <input checked="" type="button"/> <input)<="" th="" type="button" value="X"/><th>scientificName (DataFileColumn: scientificName - <input checked="" type="button"/> <input)<="" th="" type="button" value="X"/></th></th>	catalogNumber (DataFileColumn: catalogNumber - <input checked="" type="button"/> <input)<="" th="" type="button" value="X"/> <th>scientificName (DataFileColumn: scientificName - <input checked="" type="button"/> <input)<="" th="" type="button" value="X"/></th>	scientificName (DataFileColumn: scientificName - <input checked="" type="button"/> <input)<="" th="" type="button" value="X"/>
AM_ENTO_DRW_760_4001.jpg	AM_ENTO_DRW_760_4001.jpg	K473593	Coleoptera <input type="button" value="X"/>
AM_ENTO_DRW_760_4002.jpg	AM_ENTO_DRW_760_4002.jpg	K473594	Coleoptera <input type="button" value="X"/>
AM_ENTO_DRW_760_4003.jpg	AM_ENTO_DRW_760_4003.jpg	K473595	Hymenoptera <input type="button" value="X"/>
AM_ENTO_DRW_760_4004.jpg	AM_ENTO_DRW_760_4004.jpg	K473596	Diptera <input type="button" value="X"/>
AM_ENTO_DRW_760_4005.jpg	AM_ENTO_DRW_760_4005.jpg	K473597	Hemiptera <input type="button" value="X"/>
AM_ENTO_DRW_760_4006.jpg	AM_ENTO_DRW_760_4006.jpg	K473598	Lepidoptera <input type="button" value="X"/>
AM_ENTO_DRW_760_4007.jpg	AM_ENTO_DRW_760_4007.jpg	K473599	Coleoptera <input type="button" value="X"/>
AM_ENTO_DRW_760_4008.jpg	AM_ENTO_DRW_760_4008.jpg	K473600	Coleoptera <input type="button" value="X"/>

The column/s that you just added will now show up in your staged images list.

catalogNumber
(DataFileColumn: catalogNumber -  )

The columns in your stored images list can be edited or deleted. Click on the pencil symbol to edit, and the X button to delete the column.

Add as many columns as you need to your staged images list.

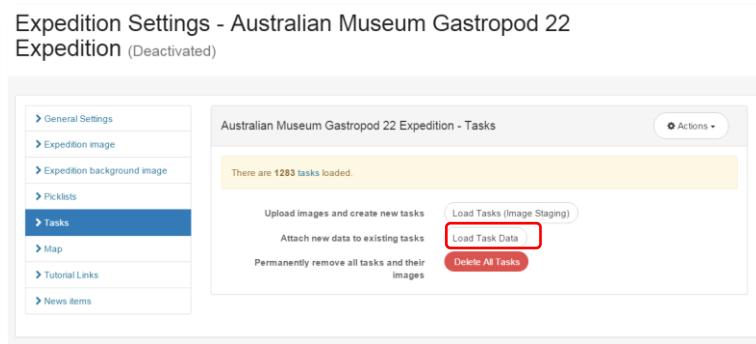


In the above example, data from your newly added columns will now populate the corresponding fields of each individual task.

In this example, a transcriber sees the 'Catalog Number' is K.482375. The number K.482375 was listed in the CSV file associated with its image filename. In the CSV file this number was in a column with a header called 'Registration number', and DigiVol referred to it using the Darwin Core field name of 'catalogNumber'.

4 Attach new data to existing tasks

You can add further data to your existing expedition tasks. This data needs to be ordered in a single CSV file before uploading.



Click on **Load Task Data** within the expedition settings to add, reload or delete the data associated with your expedition tasks.

Load Task Data

Upload a csv data file for field values

A data file has been uploaded for this project: [Clear data file](#) [View data file](#)

Task Data to load preview

[Load Task Data](#)

Task Id	External Id	catalogNumber	scientificName
11175785	AM_MALA_DRW_1468_24590.jpg	C.278486	Chrysallida marthinae
11175789	AM_MALA_DRW_1468_24592.jpg	C.34007	Chrysallida mundula
11175793	AM_MALA_DRW_1468_24593.jpg	C.278487	Chrysallida mundula
11175797	AM_MALA_DRW_1468_24594.jpg	C.278488	Chrysallida mundula

Before you can load more data for your tasks, you need to remove the old data file. It is a good idea to make a copy of the existing data; click on **View data file** to download it as a CSV file.

Click on **Clear data file** to delete the existing data file.

Once you have cleared the existing data file you may load your new CSV with the **Load Task Data** button.

Step 1b Create your expedition - Bulk manage picklists (optional)

Picklists are used within DigiVol in several areas of the transcription template. They can be used to give the transcriber a controlled or optional vocabulary. For example, a picklist could be a list of countries or scientific names.

The steps below describe how to prepare a picklist CSV file, and to upload that file into DigiVol.

Step 1. Prepare a picklist CSV file

Create a spreadsheet in Excel with two columns (either a new one, or download existing information from your database). For example: location and ref-number (ref-number is your database reference number). Column headings will be removed before uploading, but are useful while working with your data.

- Sort order can be important as this is how your picklist will appear
- Format should be 'value', ref-number (single quotation marks are required)
- To add single quote marks to an existing column of data that doesn't have single quotes:
 - Insert two blank columns between the existing column A and column B to create two new blank columns, column B and column C
 - In column B, use this formula:
=CONCATENATE("""",A2,""") repeat for the entire column
(Those 5 quote marks translate to "double-quote single-quote double-quote")
 - Copy column B and paste-as-values into column C
 - Check the results, then delete columns A and B
- Remove the column headings
- Save as a CSV comma delimited file

CSV file of 'location' , ref-number pairs, for a picklist

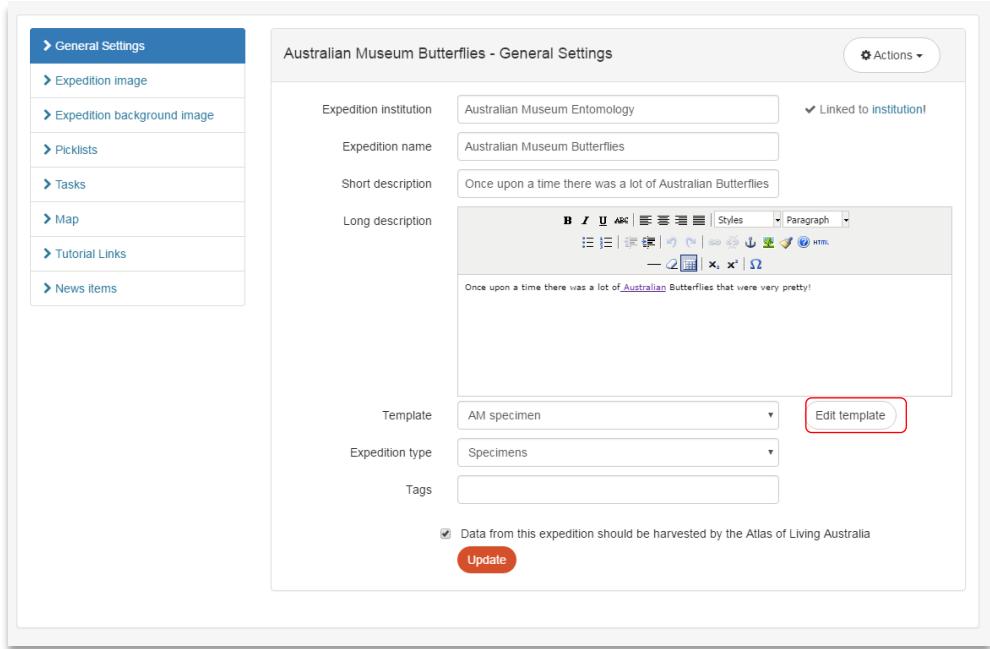
```
'16 km east of Yellowdine',10003140
'10 km south of Mount Carbine',10003250
'"Washpool National Park, North West Fire Trail",10006540
'Dunmore State Forest',10015210
'Mount Inkerman',10028110
'Separation',10028480
'35 km east of Parkes',10031050
'Mount Allyn Forest Park',10031060
'"Broken Bucket, Big Desert",10031070
'"Goat Hills, Berriedale",10031080
'16 km NNW of Rainbow',10031090
'"Mount Hopeful, 13 km SW of Bajool",10031650
'3 km south of Waterfall',10031660
'"Woods Lake, 17 km WNW of Steppes",10031670
'6 km SW of Bajool',10033340
'"Hilton Hill, Claremont",10033430
'Scamander',10033440
'"Preston Beach, 55 km north of Bunbury",10044100
'"105 Nnts Wilderness, 10 km south of Walpole",10044110
'10 km south of Ravensthorpe',10044120
```

Open file in Notepad or other text editor – not MSWord. You will use the contents of this file in Step 4 below.

Step 2. Find the Picklist Collection Code and Field Name

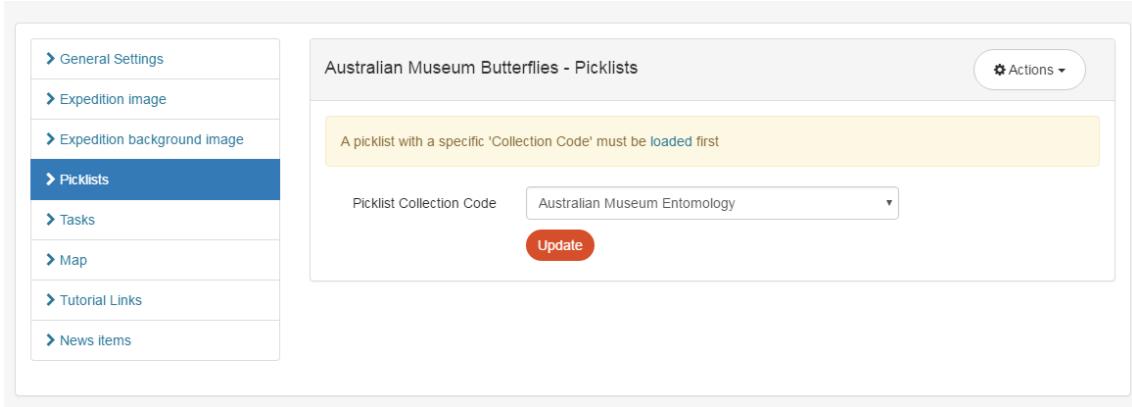
To upload a picklist you will need to know the picklist collection code and the field name that you want the picklist to appear in. These can be found in your expedition front page by clicking on the **Settings** button.

Expedition settings



The screenshot shows the 'Australian Museum Butterflies - General Settings' page. On the left is a sidebar with navigation links: General Settings, Expedition image, Expedition background image, Picklists (which is highlighted in blue), Tasks, Map, Tutorial Links, and News items. The main area contains fields for Expedition institution (Australian Museum Entomology), Expedition name (Australian Museum Butterflies), Short description (Once upon a time there was a lot of Australian Butterflies), Long description (with a rich text editor showing placeholder text about Australian butterflies), Template (AM specimen), Expedition type (Specimens), Tags, and a checkbox for harvesting data to the Atlas of Living Australia. A red box highlights the 'Edit template' link next to the Template dropdown. At the bottom is a red 'Update' button.

Go to the General Settings, Edit template and Edit fields to view the DwC Field that you will need to use to load your picklist. Make a note of the DwC Field.



The screenshot shows the 'Australian Museum Butterflies - Picklists' page. On the left is a sidebar with navigation links: General Settings, Expedition image, Expedition background image, Picklists (which is highlighted in blue), Tasks, Map, Tutorial Links, and News items. The main area displays a message: 'A picklist with a specific 'Collection Code' must be loaded first'. Below this is a 'Picklist Collection Code' dropdown set to 'Australian Museum Entomology' and a red 'Update' button.

Then click on Picklists in the Expedition Settings and make a note of **the Picklist Collection Code** for Step 4 below.

If your collection is not listed, or you need another collection code, say for another collection within your institution, then you will need to create a new Picklist Collection Code in Step 4.

Step 3. View and replace an existing checklist

Go to the **Admin** tab on the front page of DigiVol.

Administration

Version 3.1.7-SNAPSHOT (built Jun 6, 2016 PRODUCTION sha: 7a86d3c3b77f18d9e3e7776f7a90c224cd4adf47)

Tool	Description
Create New Expedition	Create a new DigiVol Expedition
Templates	Manage expedition templates and their fields
Bulk manage picklists	Allows modification to the values held in various picklists
Validation Rules	Manage transcription validation rules
Configure front page	Configure the appearance of the front page
Configure Honour Board	Configure the appearance of the Honour Board
Stats	Various Statistics (Experimental!)
Tutorial files	Manage tutorial files
Tools	Tools
Manage Institutions	Manage Institutions
Manage Badges	Manage Achievements
Manage Tags	Manage Project Tags
Advanced Settings	Advanced Settings

Admin reports Global mailing List User report Current users Expedition Summary Report

Click on the **Bulk manage picklists** button.

Manage Picklists

Picklist: verbatimLocality Create new picklist Show all picklists

Collection Code: Australian Museum Entomology Add collection code Download Items as CSV Load items into text area

CSV List

Paste csv list here. Each line should take the format '<value>[<optional key>]

Upload Upload CSV File

On the Manage Picklists page you can view or replace an existing picklist, and add a new Picklist Collection Code, or upload a new picklist.

Picklist: To modify an existing picklist choose a Darwin Core field name for your picklist from the drop-down list, e.g. verbatimLocality. The drop down list contains the names of all the fields in your template that currently have a picklist associated with them. If you want to create a picklist with a field name that is not in the drop-down list (i.e. add a new picklist to a field in your template that currently does not have a picklist), use **Create new picklist**. See **Step 3a** for more details.

Collection Code: Use an existing Picklist Collection Code, eg 'Australian Museum Entomology'. It is not recommended to leave this text box blank. If your collection is not listed, or you need another collection code, say for another collection within your institution, then you will need to create a new Picklist Collection Code.

+ *Add collection code:* To create a new Picklist Collection Code, a text box will open. Enter a name for your new Picklist Collection Code into this text box, e.g. 'NYBG Herbarium'; that name will then be available for future picklists.

Download items as CSV: Selecting this will download an existing picklist to your computer as a CSV file.

Load items into text area: The contents of an existing list will be loaded into the text box, where you can review and edit.

Step 3a. Create a picklist for an unlisted field name

Manage Picklists

Manage Picklists

Picklist: verbatimLocality

Create new picklist Show all picklists

Collection Code:

Add collection code Download items as CSV Load items into text area

CSV List:

The drop-down list of picklists shows the Darwin Core field names of all picklists that are in use. To create a picklist with a field name that isn't listed, click on **Create new picklist**

Create Picklist

Name: acceptedNameUsage

Classifier:

Create

Name: Select a Darwin Core field name for your picklist from the drop-down list, e.g. eventDate.

Classifier: This field is used if you have used a Darwin Core field name more than once in your template.

Click on **Create** button.

Show Picklist - order

Id	Key	Value	Institution Code		Search by Value
			<	>	

In this example, a picklist has been created with a field name of order. This picklist is empty; you will load items into it below.

Click on **Manage Picklist Items** to return to the Manage Picklists page.

Step 4. Updating the contents of a picklist

Manage Picklists

Manage Picklists

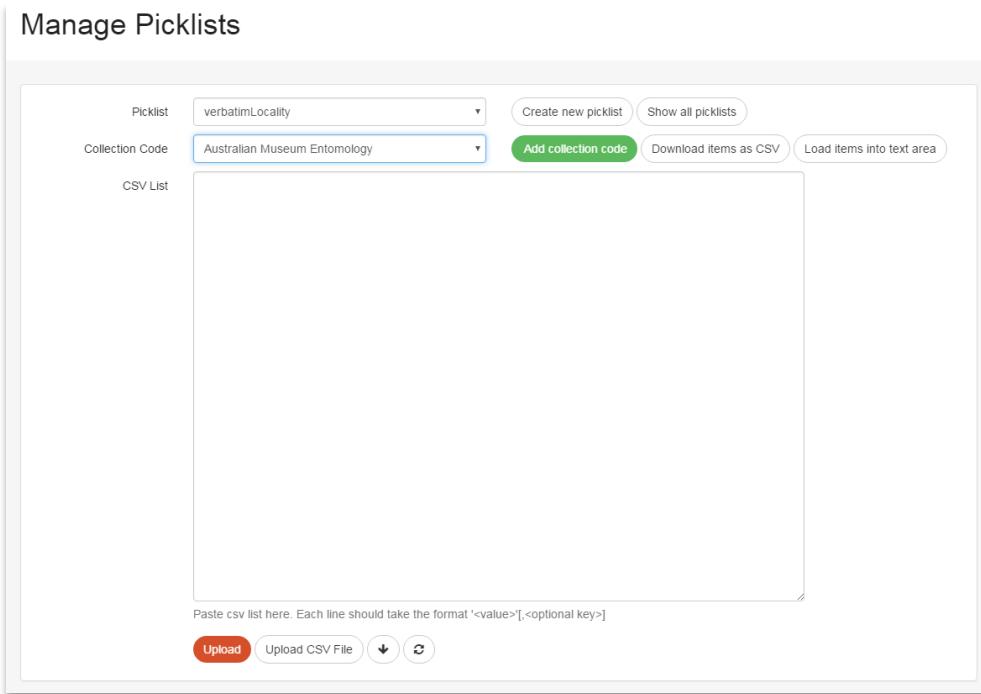
Picklist: verbatimLocality | Create new picklist | Show all picklists

Collection Code: Australian Museum Entomology | Add collection code | Download items as CSV | Load items into text area

CSV List

Paste csv list here. Each line should take the format '<value>[,<optional key>]

Upload | Upload CSV File | ↴ | ↵



You will need:

- A CSV file with the content for your new picklist. Format should be '<value>[,<optional key>]'. See Step 1 above, in **Step 1. Prepare a picklist CSV file**
- Collection Code. The Picklist Collection Code is defined in the settings for your expedition. This can be found through the Picklists Menu of Expedition Settings page for your project. See
- Step 2. Find the Picklist Collection Code
- Picklist field name. This is defined in the template for your expedition. For example, 'verbatimLocality'. You can find this information through the Expedition Settings page for your project. See **Step 2**.

To add content to a new picklist, or replace the contents of an existing picklist

1. Choose from the Picklist drop-down box the field name of the picklist you would like to update. In the above example 'verbatimLocality' .
2. Choose the Collection Code for your expedition from the drop-down box.
3. Paste the contents of your CSV file into the text box.

Manage Picklists with the contents of a CSV file pasted in

Manage Picklists

Picklist: verbatimLocality | Create new picklist | Show all picklists

Collection Code: Australian Museum Entomology | Add collection code | Download items as CSV | Load items into text area

CSV List:

```
16 km east of Yellowdine,10003140
10 km south of Mount Carbine,10003250
Dunmore State Forest,10015210
Mount Inkerman,10028110
Separation,10028480
35 km east of Parkes,10031050
Mount Allyn Forest Park,10031060
"Broken Bucket, Big Desert",10031070
"Goat Hills, Berriendale",10031080
16 km NW of Rainbow,10031090
3 km south of Waterfall,10031660
"Woods Lake, 17 km WNW of Steppes",10031670
6 km SW of Bajool,10033340
"Hilton Hill, Claremont!",10033430
Scamander,10033440
```

Paste csv list here. Each line should take the format '<value>[,<optional key>]

Upload | Upload CSV File | ↻ | ⌂

Click on the **Upload** button. Your picklist will now be available for transcribing tasks.

To remove the contents of an existing picklist, select a picklist field name and a Collection code. Delete any content in the text box. Click on **Upload** button.

Caution: After uploading the contents of a picklist, the Picklist drop-down field will, by default, revert back to 'country'.

You can also upload a CSV file directly. Click on the Upload CSV file button a textbox will open - Upload picklist file

Upload picklist file

Picklist: verbatimLocality | Collection Code: Australian Museum Entomology | Picklist file: Browse

Close | Submit

Click on the Browse button and select your picklist CSV file created earlier.

Click on the **Submit** button. Your picklist will now be loaded to the verbatimLocality field.

Step 5. Confirm changes

On your expedition front page, click on the **Get Started** button

In the relevant text box (eg locality) start typing a word from your picklist. Your picklist should appear.



STEP 2: MANAGE YOUR DIGIVOL EXPEDITION



May 2023

AUSTRALIAN MUSEUM

1 William Street Sydney

NSW 2010 Australia

T 61 2 9320 6000

Web: australian.museum



Table of contents

1	Introduction	2
	Checklist of key actions to manage your DigiVol expedition.....	2
2	Volunteer engagement and promotion	3
2.1	Promote through your networks	3
2.2	Media release.....	3
2.3	Social media	3
2.4	DigiVol e-newsletter.....	4
3	Manage your volunteers.....	5
3.1	Managing personnel	5
3.2	Volunteer not following the tutorial guidelines	6
3.3	Post a message to your expedition forum	6
3.4	Send an email to volunteers	6
3.4.1	Send an email to all volunteers in an expedition.....	7
3.4.2	Send an email to an individual volunteer	8
3.4.3	Send an email to all volunteers in your institution.....	8
3.5	Moderate your expedition forum	9
3.5.1	Receive forum notifications	9
4	Validate tasks.....	11
4.1	Add a validator.....	11
4.2	Validate your task	11
4.2.1	Validate Wildlife Spotter expeditions	12
4.3	Reset transcribed/validated status.....	12
5	Are you stuck?.....	13

1 Introduction

You have come a long way! You have completed *Step 1: Create your expedition*. You have selected a template, tweaked your expedition background image so that it is perfect, staged and loaded your tasks, prepared your tutorial, tested your expedition and you have had the satisfaction of pressing the activate button. Hooray. Now what? We have prepared this guide *Step 2: Manage your expedition* to help you manage your expedition after it has gone live.



Checklist of key actions to manage your DigiVol expedition

- Promote your expedition to your networks and social media.
- Email your social media handles to DigiVol@australian.museum so that we can promote your work on our social media channels.
- Set up notifications so that you receive an email when somebody posts to your expedition forum.
- Moderate your expedition forum.
- Check that your volunteers are providing responses which meet your expectations.
- Start validating your tasks.

2 Volunteer engagement and promotion

We strongly encourage you to engage your own networks to work on your expeditions, and you will have access to DigiVol's 10,000+ citizen scientists! DigiVol is a great way for your supporters to make a meaningful and tangible contribution to your project.

2.1 Promote through your networks

Promote your DigiVol expedition and encourage your supporters to be involved. Think about promoting your expedition through:

- Any relevant email lists including your colleagues, stakeholders, volunteers, supporters, corporate partners, friends and family.
- Newsletters, both internal and external to your institution.
- Your institution or project webpage.

2.2 Media release

We encourage you to put out a media release to promote your DigiVol expedition and to encourage participation. Please remember that any media articles about your DigiVol expedition should include the following acknowledgement:

DigiVol is a collaboration between the Australian Museum and the Atlas of Living Australia.

2.3 Social media

Social media is a great way to promote your expedition. Please include the direct weblink to your expedition page and an enticing photograph to accompany your post.

When you are promoting your DigiVol expeditions on social media, please use our social media handles:

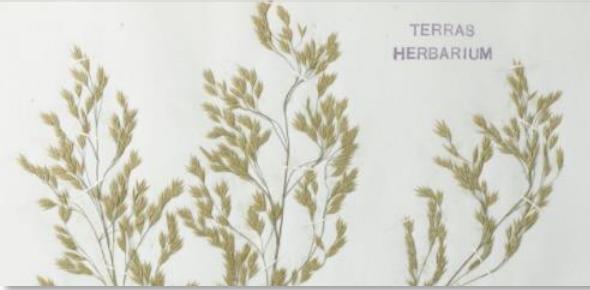
[Facebook](#) @AMDigiVol, [Twitter](#) @AMDigiVol and use #digivol as we like to share and retweet opportunities from institutions using DigiVol.

We also like to make our own posts to promote your expeditions, especially when they first launch, so please let us know your preferred social media handle so that we can tag your institution.

Some example posts to promote new expeditions on DigiVol are below:

DigiVol
September 30 ·

@RBGE_Herbarium have just launched a series of specimen label expeditions on #DigiVol focusing on the British and Irish Flora. Come and join us!
<https://volunteer.ala.org.au/project/index/142057091>
#RBGE_Science



DigiVol
October 23 at 4:00 PM ·

Plastic pollution is one of the most pressing issues facing marine wildlife around the world. Galapagos Conservation Trust have created a unique #DigiVol project where your detective skills can help research where plastic found washing up on beaches is coming from. 😊🔍🐠
<http://ow.ly/OEKz50BZkmb>



From time-to-time we may also promote your DigiVol expeditions as part of campaigns and events, such as WeDigBio:

DigiVol
October 16 at 4:30 PM ·

Do you love 80's Rocks?! 😍 The [Australian Museum](#) research team are on board with #WeDigBio this year and need your help to #digitise rock registers from the 1980's and 1990's on #DigiVol. These tasks aren't for the faint hearted... 🤪✍️💻



DigiVol
October 15 at 12:30 PM ·

Cockroaches are not the most loveable, or most loved, insects in the world. But you can help during #WeDigBio to build knowledge of Australian cockroaches with the CSIRO Australian National Insect Collection on #DigiVol 😊roach Start transcribing now! <http://ow.ly/Jm9S50BRTdd>



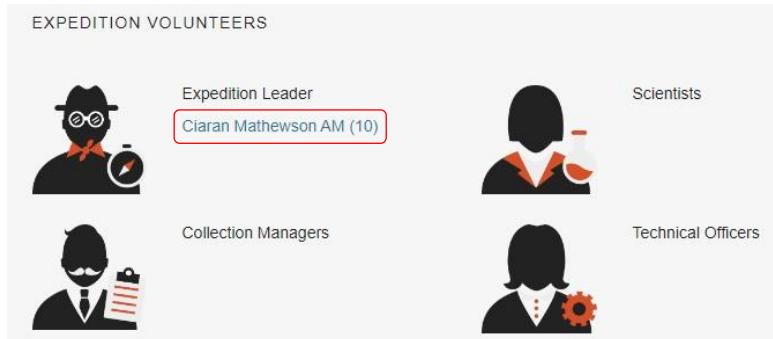
2.4 DigiVol e-newsletter

We put out a regular monthly e-newsletter to our DigiVol volunteers and we welcome your contributions. We endeavour to announce new expeditions through our e-newsletter.

3 Manage your volunteers

After activating your expedition, it is a good idea to check the completed tasks to see if volunteers are completing tasks according to your expectations. It is highly recommended to do this ASAP so that you can identify any issues or concerns early which will save a lot of time and grief later.

3.1 Managing personnel



On the front page of your expedition is a list of all the volunteers contributing. When volunteers participate in your expedition, they will show up under the different headings. This is a gamification element that helps draw volunteers back to the same expedition:

- **Expedition Leader:** The volunteer who currently has the most transcriptions
- **Scientists:** Completed 50+ transcriptions
- **Collection Managers:** Completed 10+ transcriptions
- **Technical Officers:** Completed less than 10 transcriptions

If you click on a volunteer's name, their volunteer profile will pop up showing all their tasks transcribed, saved and validated *specifically for this expedition*. These details and ranks can often be a good way to identify Validators (see **4. Validate Tasks** for more information).

The screenshot shows a 'VOLUNTEER PROFILE' for Ciaran Mathewson AM. It includes:

- Profile Picture:** A blue circular logo with a white stylized 'C' shape.
- Name:** Ciaran Mathewson AM
- Expedition:** Camera Trap Filmstrip Test3
- Total Contribution:** 86
- Transcribed:** 10
- Validated:** 20

A separate box on the right titled 'CONTRIBUTION TO RESEARCH' shows Ciaran has added 1 species to the ALA: *Eurymelessa mortuana*. Below this, a large blue circle contains the species name. Text at the bottom of this box states: 'Ciaran has contributed to 1 new field observations. Ciaran has participated in 14 expeditions. Ciaran has transcribed 0.01% of the total transcriptions on DigiVol.' A note at the bottom says 'First contributed in Sep 2022'. At the bottom of the main profile area, there are tabs for 'Achievements', 'Transcribed Tasks', 'Saved Tasks', 'Validated Tasks', and 'Forum Activities'. A search bar is also present.

3.2 Volunteer not following the tutorial guidelines

If your volunteers are not following the tutorial guidelines there are a number of options:

1. Consider putting a note on your expedition description upfront to remind people how important it is to read the tutorial.
2. Review your tutorial to make sure it is clear what you are asking volunteers to do. You could include common mistakes transcribers make.
3. You can try posting a general update to your expedition forum to provide feedback, including common mistakes. Keep it positive and supportive and thank transcribers for their work. Please do not single out individual transcribers who are making mistakes.
4. You can send an email to all the transcribers who have been involved in your expeditions (see **3.5.1** section below).
5. You can send an email to individual transcribers who are not following the tutorial guidelines and provide them with feedback (see **3.5.2**). Again, please keep it positive and supportive.

If you continue to have difficulties please speak directly to the DigiVol Coordinator, and we can work together towards the best possible outcome.

3.3 Post a message to your expedition forum

You can post general announcements to your expedition forum. Keep it positive and supportive and thank transcribers for their work. Please do not single out individual transcribers who are making mistakes.

Go to your Expedition page and then click on the link to **Visit project forum** under the **Get started** button.

3.4 Send an email to volunteers

If you have a very important message for your volunteers, such as providing feedback or addressing a major issue, you can send an email to them. Since emails are hidden on DigiVol to uphold our privacy standards, DigiVol has the functionality to email particular groups of people or individuals without revealing their email addresses. In most cases, it will be preferable to just post a message to your expedition forum.

On your Expedition page, go to **Admin**. From the **Tools** drop down menu select “Send a message to Volunteers”:

The screenshot shows the 'Expedition administration - Camera Trap Filmstrip Test3' interface. At the top left, there is a yellow 'Inactive' button. Below it, a message says 'Created by Ciaran Mathewson AM on 12 October, 2022.' A 'Tools' dropdown menu is open, showing several options: 'Edit project', 'Send a message to Volunteers' (which is highlighted with a red box), 'Manage picklists', 'Reindex tasks', 'View my stats for this project', and 'View Institution page'. To the right of the dropdown, there is a table with three columns: 'Transcribed', 'Validated', and 'Tasks Left'. The values are 10, 10, and 0 respectively.

This will open the Institution Messages page, which can also be accessed from the DigiVol homepage, through the **Admin** tab → **Institution Messages**. Through this page, you can send emails to all volunteers who have participated in an expedition, to an individual volunteer, or to all volunteers who have transcribed a task in any of your institution's expeditions. Note that this means if a volunteer has been cleared from an expedition due to "Reset transcribed/validated status" (see **4.3** below) they will not be able to be messaged.

The screenshot shows the 'New Institution Message' interface. At the top, there's a breadcrumb navigation: Home > Administration > Institution Messages > New Institution Message. The main title is 'New Institution Message'. Below it, there are several input fields:

- Institution:** Institution of Claran
- Recipient Type:** Users in an Expedition
- Recipient:** A dropdown menu showing 'Users in an Expedition' (selected), 'Single User', 'Users in this Institution', and 'Users in this Expedition'.
- Subject:** Thanks for all your help!

Below these fields is a section titled 'Include Institution Contact' with a checkbox. To the right of the checkbox is a note: 'Add's the Institution contact email as the message's sender'. Underneath is a 'Message Body' area with a rich text editor toolbar. The note at the bottom of the form reads: 'Note: Creating this message does not send immediately to volunteers: Messages must be approved by DigiVol Administrators before messages are sent.' At the very bottom is a red 'Create' button.

3.4.1 Send an email to all volunteers in an expedition

If the message is specific to an expedition - for example it's about to be removed whilst it is still active, there has been a major change in the method of transcribing or a new tutorial has been added - you can email all volunteers in that particular expedition.

In *Recipient Type*, select "Users in an Expedition".

In *Recipient*, select the name of the expedition from the drop-down. DigiVol then invisibly generates a mailing list of the email addresses of all volunteers in the expedition to send the message to.

The *Subject* and *Message Body* are as a normal email, and you can add any formatting and links as you like.

Tick the "Include Institution Contact" box if you want the reply-to email to be the email address associated with your Institution in your Institution Settings (not necessarily the email your currently logged-in account uses). If unticked, the reply-to email will be DigiVol. In this case we suggest providing an email in the Message Body that volunteers can reply to. See the screenshot below for an example.

Once you are done, click **Create**.

Here is an annotated example of what the final, emailed version of an Institution Message looks like when the “Include Institution Contact” box has been ticked:

The image shows an email from DigiVol. At the top is the DigiVol logo. Below it, the subject line "A message from Australian Museum Entomology Collection." is underlined. To the right of the subject line is the text "The Institution name". The body text says "Body text. Hyperlinks can be added but we don't recommend using pasted images. You are unable to add attachments." Below this is a blue link "The account name the message was sent from, and the Institution name". Underneath the link is the text "This communication has been sent by Ciaran Mathewson, representative of Australian Museum Entomology Collection, the views and opinions of whom do not represent those of the Australian Museum or the Atlas of Living Australia." A green bracket highlights the link and the explanatory text below it. Below this is another blue link "You can reply to this email to contact Paul Flemons, Australian Museum Entomology Collection." A green bracket highlights this link. Below it is the text "If you do not want to receive these communications, please opt out using the link below." A green bracket highlights this text. At the bottom left is a black button with white text "Visit DigiVol". To the right of the button is the text "The Institution contact name in Institution Settings, and the Institution name" with a green bracket highlighting it.

If the “Include Institution Contact” box has *not* been ticked, the “You can reply to …” is replaced with “This email was sent by the DigiVol System. Please do not reply to this email.”

The email does not send immediately. All Institution Messages need to be approved by a DigiVol System Admin, and the Admins will be alerted that there is a new message. They will then approve (or decline) it and it will be sent. It is rare for a message to be declined by the Admins, this is just a precaution to prevent flooding volunteers with messages.

3.4.2 Send an email to an individual volunteer

You can send an email to a specific individual, for example if they are the only volunteer who is incorrectly transcribing, or they are being rude or insulting on the Forum.

In *Recipient Type*, select “Single User”.

In *Recipient*, select the name of the volunteer from the drop-down list. The list will only be populated by volunteers who have participated in expeditions created by your institution. Note that there is the chance of having multiple volunteers with the same name – in this case, contact the DigiVol Coordinator and they can identify the correct volunteer.

Complete as above.

3.4.3 Send an email to all volunteers in your institution

You can send an email to every single volunteer who has participated in any expedition created by your institution, for example if you are leaving DigiVol or preparing to stop releasing expeditions for an extended period of time and want to send a thank you to all

volunteers for their help. This is the least used option, and it is often also just as effective to put a Forum message out.

In *Recipient Type*, select “Users in this Institution”.

Recipient will be greyed out.

Complete as above.

3.5 Moderate your expedition forum

You are responsible for answering questions posted to your expedition forum. We encourage you to provide a prompt response where possible. Please also keep your responses positive: thank the volunteers for their great work and then offer hints which will improve their transcriptions. Please do not single out individual transcribers who are making mistakes.

The DigiVol Coordinator also moderates your posts to the forum and will answer any questions which are not particular to your expedition and relate to the DigiVol platform as a whole.

3.5.1 Receive forum notifications

To ensure that you do not miss a forum message from one of your volunteers, set up your role as a forum moderator so that you will receive a notification whenever a volunteer posts to the forum. You can also give others the forum moderator status which means they will also receive email notifications when a post is made to your expedition forum or any forum post relating to your institution.

To do this, go to the **Admin** tab on the DigiVol homepage, then go to **Manage User Roles**:

The screenshot shows the 'Administration' section of the DigiVol platform. At the top, it says 'Administration' and 'Version 6.1.4 (built Oct 27, 2022 PRODUCTION sha: c0ea0dced618aefc7308648816f5af9b6c1a634f)'. Below this is a table with 'Tool' and 'Description' columns. The 'Manage User Roles' button is highlighted with a red box. Other tools listed include 'Manage Institutions', 'Manage Expeditions', 'Create new Expedition', 'Templates', 'Bulk manage Picklists', 'Stats', 'Tutorial Files', 'Institution Messages', 'Admin reports', and 'Expedition Summary Report'.

Tool	Description
Manage Institutions	Manage Institutions
Manage Expeditions	Download expedition images and remove from server, clone and edit expedition.
Create new Expedition	Create a new DigiVol Expedition
Templates	Manage expedition templates and their fields
Bulk manage Picklists	Allows modification to the values held in various picklists
Stats	Various Statistics (Experimental!)
Tutorial Files	Manage tutorial files
Manage User Roles	Manage User Roles, such as validators and forum moderators.
Institution Messages	Create and send messages to volunteers of your institutions and expeditions.
Admin reports	Expedition Summary Report

In the resulting User Role page, at the top you can add a role to an existing user. In “Role Type”, select “forum_moderator”. Select your institution if you want the user to receive notifications for all of your institution’s expeditions, or set a particular expedition. Enter the user’s name, then click **Save**.

NB: If you know the user’s email, then start typing that in. It will avoid misidentifying people when they have the same first and last name.

User Role

Add new User Role

This tool is to maintain users and specific roles within your institutions or expeditions as validators or forum moderators.
This section is for adding new users to roles. [Click here for instructions.](#)

Role Type	Role Level	Institution/Expedition	User's Name
- Select a Role -	<input checked="" type="radio"/> Institution <input type="radio"/> Expedition	Australian Museum Entomology Collection	Enter user's name
Save			

Maintain User Roles

This section allows Institution Administrators to manage the existing user roles within their institutions and expeditions. You can filter the roles by institution, expedition and/or by user.
[Click here for more information.](#)

Australian Museum Entomology Collection	Filter by Expedition...	Filter by User...	Apply	Reset
---	-------------------------	-------------------	-------	-------

6 User roles found.

Name	Role	Role Level	Institution/Expedition	Added By	Date Added	Action
Ciaran Mathewson (273268716)	Forum Moderator	Institution	Australian Museum Entomology Collection	Ciaran Mathewson	2023-03-06 14:04	

4 Validate tasks

You are responsible for validating your tasks for accuracy and consistency.

DigiVol has an inbuilt system for auto-validation of Wildlife Spotter expeditions and you would have set these rules for fields in your template when you set up your expedition. Where there is ambiguity and for Specimen Label and Historical Notes expeditions, you and/or your colleagues will need to validate the data.

If you cannot keep on top of validating your tasks, another option you could consider is asking some of your best transcribers to assist you. Many institutions do this and it is an honour for volunteers to be asked as it is an indication that you obviously like their work and trust them to take on such an important task. The DigiVol Coordinator may be able to advise on experienced volunteers who may be suitable validators, if necessary.

We encourage you to start validating your tasks before the expedition has been finished so that you can identify any issues or concerns early which will save a lot of time and grief later.

4.1 Add a validator

Go to the **Admin** tab → **Manage User Roles** as before, however this time select “validator”.

Add new User Role

This tool is to maintain users and specific roles within your institutions or expeditions as validators or forum moderators. This section is for adding new users to roles. [Click here for instructions.](#)

Role Type	Role Level	Institution/Expedition	User's Name
<input type="button" value="validator"/>	<input type="radio"/> Institution <input checked="" type="radio"/> Expedition	- Select an Expedition -	Enter user's name
<input type="button" value="- Select a Role -"/>			
<input style="background-color: #0070C0; color: white; font-weight: bold; text-decoration: none; padding: 2px 10px; border-radius: 5px; border: none;" type="button" value="validator"/>			
<input type="button" value="forum_moderator"/>			

You can choose a particular expedition that you would like the user to have validator permissions, or tick Institution so they can validate every one of your expeditions.

4.2 Validate your task

On your Expedition page, click the **Validate tasks** button. You can also validate tasks through the **Admin** button. These options will only be visible with validator permissions.



This will bring up a list of the tasks in your expedition. Click on the button next to a task which will bring up the task with the transcriber's work. Check this work for accuracy and consistency and make any corrections in the necessary fields. Then click the **Submit validation** button.

You may wish to develop a cheat sheet for your validators to ensure that common mistakes are fixed in a consistent way. Depending on the nature of your expedition and the validations required, you may also find it easier to make corrections *after* you have exported your data. For example, if a transcriber has consistently misspelt a name, this could be more easily corrected with the find/replace function in the exported spreadsheet.

4.2.1 Validate Wildlife Spotter expeditions

If you have set the rules for systems validation in your Wildlife Spotter expedition, the majority of your tasks should be automatically validated. These rules are “Number of Transcriptions” and “Threshold of Matching Transcriptions (Auto Validation)”, and are explained in *Step 1: Create your Expedition – Wildlife Spotter*.

To find those tasks which need to be manually validated, click on **Status** or **Fully Validated By** to order your tasks.

4.3 Reset transcribed/validated status

In Expedition **Admin**, you can see the metadata and the fields in which all the data has been entered by clicking the icon to the left of a task.

Search tasks...						
ID	Catalog Number	Scientific Name	Fully Transcribed By	Fully Validated By	Status	Action
MELUD129173a.jpeg					New	
image1.jpg					New	

The resulting page has two yellow buttons beneath the task image.

Reset transcribed status **Reset validated status**

These buttons will re-open the task to be transcribed or validated by a new volunteer, and remove the name of the previous volunteer who transcribed/validated it. The reset buttons do not clear the transcription itself, so anything that was entered in the fields will remain as it was and needs to be manually deleted. The buttons were implemented as a last-resort method for if volunteers were opening and submitting blank or incomplete transcriptions with the sole purpose of reaching a high contribution number.

Due to this implementation, the reset buttons have other knock-on effects. The reset task(s) will no longer show up in the previous volunteer's Notebook, thus not adding to their contributions. If all the volunteer's transcriptions have been reset, their name will also be removed from the "Expedition Volunteers" gamification section on the expedition home page (see **3.1 Managing Personnel**), as if they haven't participated in the expedition at all.

Since Institution Messages can only be sent to volunteers who have participated in an expedition within your institution, this means the volunteer who has had all their tasks reset will no longer be able to be sent an Institution Message.

Make sure to send an Institution Message to volunteers in question *before* resetting their transcription/validation status, otherwise they may not be selectable and won't remain within the "Users in this expedition/institution" messaging group.

5 Are you stuck?

If you are having problems, don't worry. Help is not far away:

DigiVol Online Coordinator
Digital Collections and Citizen Science
Centre for Citizen Science
Australian Museum Research Institute
Australian Museum
1 William Street Sydney NSW 2010 Australia

Email: digivol@australian.museum



STEP 3: FINALISE YOUR DIGIVOL EXPEDITION



March 2023

AUSTRALIAN MUSEUM

1 William Street Sydney

NSW 2010 Australia

T 61 2 9320 6000

Web: australian.museum



Table of Contents

1	Introduction.....	3
	Checklist of key actions to finalise your DigiVol expedition	3
2	Finalising task validation	4
2.1	Validate Wildlife Spotter expeditions	4
3	Export data	5
4	Archive your expedition	7
5	Thank volunteers and provide feedback.....	8
6	Promote the progress and outcomes of your expeditions through DigiVol.....	9
6.1	DigiVol newsletter contributions	9
6.2	Social media	9
6.3	Scientific papers	9
6.4	Media articles	9
7	Are you stuck?.....	10

1 Introduction

Your expedition is almost complete. You have completed *Step 1: Create your expedition* and *Step 2: Manage your expedition*. Your DigiVol volunteers have been busy transcribing the tasks in your expedition, you have been moderating your expedition forum and answering any questions posed by your volunteers, you have started validating your tasks. Now what? We have prepared this guide *Step 3: Finalise your expedition* to help you finalise your expedition and extract that all important data for your use and dissemination.



Checklist of key actions to finalise your DigiVol expedition

- Finalise the validation of your tasks
- Download your data
- Archive your expedition
- Thank your volunteers and provide feedback
- Share publications and media articles with DigiVol

2 Finalising task validation

You are responsible for validating your tasks for accuracy and consistency. Hopefully you have started validating your tasks before your expedition has been fully transcribed so any issues or concerns have been addressed earlier. All the information you need to validate a task can be found in a separate guide called *Step 2: Manage your expedition*.

We encourage you to finalise the validation of your tasks as soon as possible after your transcriptions have been completed, while everything is fresh in the minds of you and your validators. Your validators might be your colleagues, DigiVol volunteers who you have nominated to help with validations, maybe you are validating alone or if you have a Wildlife Spotter expedition your tasks may be system-validated. You may want to follow up with your validators if there are validations outstanding.

There is a good chance that there will be a small number of tasks remaining which may need your expert attention, or which may require you to seek further clarification. In most cases we recommend that this is done before you download your data from DigiVol as the image and transcription will be ideally displayed for you to correct and validate. However, depending on the nature of your expedition and the validations required, you may find it easier to make final corrections *after* you have exported your data. For example, if a transcriber has consistently misspelt a name, this could be more easily corrected with the find/replace function in the exported spreadsheet.

2.1 Validate Wildlife Spotter expeditions

If you have set the rules for systems validation in your Wildlife Spotter expedition, the majority of your tasks will be automatically validated. These tasks can be identified with “system” as the validator. These rules are “Number of Transcriptions” and “Threshold of Matching Transcriptions (Auto Validation)”, and are explained in *Step 1: Create your Expedition – Wildlife Spotter*.

Fully Transcribed By	Matching	Fully Validated By	Status	Action
	4	system	Validated	

The eye symbol allows you to review the validation.

To find those tasks which need to be manually validated, click on “Status” or “Fully Validated By” to order your tasks ascending or descending by New → In Progress → Transcribed → Validated.

3 Export data

Your data can be downloaded from DigiVol as a CSV file. To download your data, go to your Expedition page and click on the **Admin** button.

Australian Museum Robber Fly Expedition - 1

Archived Inactive

The Robber Flies belong to the Asilidae family, they are also known as assassin flies. The name "robber flies" reflects their notoriously aggressive predatory habits. They feed mainly or exclusively on other insects and as a rule they wait in ambush and catch their prey in flight. They are powerfully built, bristly flies with a short, stout proboscis enclosing the sharp, sucking hypopharynx.

Expedition complete ✓

See similar expeditions



Admin Settings Validate tasks

Visit Project Forum »

In the **Tools** drop-down, select Export all, Export transcribed, or Export validated tasks to download those tasks. All of these will open a dialog box.

Home > Expeditions > Australian Museum Robber Fly Expedition - 1 > Expedition administration - Australian Museum Robber Fly Expedition - 1

Expedition administration - Australian Museum Robber Fly Expedition - 1

Archived Inactive

Tools ▾

Edit project

Send a message to Volunteers

Manage picklists

Update empty recordedByID values from picklist match

Reindex tasks

View my stats for this project

View Institution page

Export all tasks

Export transcribed tasks

Export validated tasks

Validated Tasks Left Total Disk Usage

Export all tasks

Select an export format

Single de-normalised CSV file
Repeating fields will get a column each with a record index suffix (e.g. recordedBy_0, recordedBy_1). This is probably the most appropriate choice for specimen label transcriptions.

ZIP file
A compressed archive of multiple flat CSV files, one for each one-to-many relationship. Files are linked by a task id. Suitable for field diaries and notebooks with large numbers of repeating fields.

Cancel

Export

The dialog box gives you a choice of a single CSV file, or a ZIP file of multiple CSV files. If unsure, leave the default **Single de-normalised CSV file** checked, and click on the Export button.

A CSV file (or a ZIP file of multiple CSV files) will be prepared and downloaded to your computer. This CSV file can be opened in Excel, or viewed with a text editor like Notepad. Column headers of your CSV file will have [Darwin Core terms](#) where applicable.

Data in the CSV file will include not only the transcribed text for each task, but also the name of the task transcriber and the name of the task validator together with any comments that they may have added. The downloaded CSV file is in Unicode (UTF-8) format, so if you open it directly into Excel, some of the symbols may not appear properly (for example gender symbols appear as â™€ instead of ♀).

To avoid symbols changing form, you can import the CSV instead of opening it directly:

- Open a blank Excel document
- Go to the Data tab
- In “Get & Transform Data”, click “From Text/CSV”
- Find the CSV and click “Import”
- In the popup, set the File Origin to “Unicode (UTF-8)”
- Click “Load”

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	
1	taskID	taskURL	validation	transcriberID	validatorID	externalID	exportCon	dateTranscribed	dateValidated	catalogNumber	coordinateUncertainty	country	decimalLatitude	decimalLongitude	eve
2	3903791	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	19/05/2014 23:07	31/05/2014 16:21	K.342114			Australia		18,		
3	3900673	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	16/05/2014 10:49	19/05/2014 14:27	K.327139	10000	Australia		-33.03	146.18	23,	
4	3902744	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	19/05/2014 10:01	27/05/2014 09:35	K.327337		Australia			29,		
5	3899627	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	20/05/2014 22:48	21/05/2014 17:40	K.341771	5000	Australia		-31.89	149.12	24,	
6	3903090	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	19/05/2014 11:26	29/05/2014 8:56	K.327403		Australia			21,		
7	3902749	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	19/05/2014 10:02	27/05/2014 9:37	K.327338		Australia			29,		
8	3899632	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	20/05/2014 22:50	21/05/2014 17:42	K.341772	5000	Australia		-31.9	149.12	19,	
9	3903095	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	19/05/2014 11:32	29/05/2014 8:57	K.327404		Australia			21,		
10	3902754	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	19/05/2014 10:02	27/05/2014 9:38	K.327339		Australia			29,		
11	3899637	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	20/05/2014 22:52	21/05/2014 17:41	K.341773	5000	Australia		-31.9	149.12	19,	
12	3902414	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 21:52	24/05/2014 10:15	K.327271					26,		
13	3904463	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	20/05/2014 8:53	4/06/2014 10:33	K.342247		Australia			5,		
14	3901016	https://volur/Validated	Reiner Richter	Megan Edey	AM_ENTO Validated	16/05/2014 18:44	19/05/2014 18:23	K.327197	100000	Australia		-25.1	148.2	194,	
15	3900343	https://volur/Validated	Geoffrey Berry	Megan Edey	AM_ENTO Validated	15/05/2014 21:01	18/05/2014 17:57	K.341597		Australia			10,		
16	3903796	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	19/05/2014 23:07	31/05/2014 16:22	K.342115		Australia			18,		
17	3900006	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	15/05/2014 11:02	18/05/2014 15:04	K.341837		Australia			6,		
18	3904468	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	20/05/2014 8:54	4/06/2014 10:34	K.342248		Australia			5,		
19	3902419	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 21:52	24/05/2014 10:17	K.327272					26,		
20	3902424	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 21:53	24/05/2014 10:18	K.327273					26,		
21	3902429	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 21:54	24/05/2014 10:19	K.327274					25,		
22	3902434	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 21:56	24/05/2014 10:21	K.327275					28,		
23	3902439	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 21:58	24/05/2014 10:23	K.327276					28,		
24	3902444	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 21:58	24/05/2014 10:24	K.327277					28,		
25	3902449	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 21:59	24/05/2014 10:27	K.327278					28,		
26	3904473	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	20/05/2014 8:55	4/06/2014 10:35	K.342249		Australia			10,		
27	3902454	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 22:00	24/05/2014 10:28	K.327279					28,		
28	3904478	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	20/05/2014 8:55	4/06/2014 10:37	K.342250		Australia			10,		
29	3902459	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 22:00	24/05/2014 10:28	K.327280					28,		
30	3904483	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	20/05/2014 8:56	4/06/2014 10:49	K.342251		Australia			12,		
31	3902464	https://volur/Validated	Grahame Parsons	Megan Edey	AM_ENTO Validated	18/05/2014 22:01	24/05/2014 10:29	K.327281					28,		
32	3904488	https://volur/Validated	Baz Walter	Megan Edey	AM_ENTO Validated	20/05/2014 9:00	4/06/2014 11:56	K.342252		Australia			29,		

Your CSV file will have columns corresponding to the Darwin Core fields transcribed in your expedition tasks, as above.

Note: The CSV will only have the Darwin Core field names, not the headings that you have applied to the fields in your Template.

It is recommended to keep track of which Darwin Core field corresponds to each template field.

4 Archive your expedition

If an expedition is 100% transcribed and 100% validated, and you have downloaded your exports (see section **3. Export Data**), now is the time to archive the expedition. As our DigiVol server space is limited, we require that you archive your expedition as soon as possible after you have validated your data. Please note, you may be prevented from uploading further expeditions to DigiVol if you have a large number of validated expeditions which have not been archived.

To archive your expedition, go to the **Admin** tab at the top of the DigiVol site and select **Manage Expeditions**.

Australian Museum Entomology Collection		- Filter by Status -	butterflies	🔍		
ID	Expedition	Status	Completion %	Date Created	Size	Actions
306952491	Australian Museum Butterflies - Expedition 9	✓	100 / 32.715	22-Feb-2023	319 MB	
203500850	Australian Museum Butterflies - Expedition 5	✗	100 / 100	19-Nov-2021	340 MB	
205688859	Australian Museum Butterflies - Expedition 6	✗	100 / 100	07-Dec-2021	556 MB	
238421036	Australian Museum Butterflies - Expedition 7	✗	100 / 100	06-Apr-2022	442 MB	
238421130	Australian Museum Butterflies - Expedition 8	✗	100 / 100	06-Apr-2022	550 MB	
243705989	Australian Museum Butterflies - Expedition 7.1	✗	100 / 100	13-May-2022	222 MB	
3474982	Australian Museum Butterflies From Around the World - 1	✗ ✗	100 / 100	23-Jun-2016	0 bytes	
4316395	Australian Museum Butterflies From Around the World - 2	✗ ✗	100 / 100	23-Jun-2016	0 bytes	
4713563	Australian Museum Butterflies From Around the World - 3	✗ ✗	100 / 100	23-Jun-2016	0 bytes	
5047316	Australian Museum Butterflies From Around the World - 4	✗ ✗	100 / 100	23-Jun-2016	0 bytes	

You can check on your expeditions' completion level and the size they take up here too. There are two steps to archiving. The first is optional, but strongly recommended.

1. *Optional* Download the images from your expedition. This can be done using the button, and it will download a ZIP file with all your images in it. You will not be able to do this step after you have archived your expedition, so if you want this additional record of your images, make sure to do this first.
2. Click the button to archive your expedition. This will open a confirmation popup so you can't do this by accident. An archived expedition will remove all the images from your expedition, but will retain the transcriptions, validations and metadata of the expedition. You can still export data from an archived expedition, but not images.

In the **Status** column, no symbol means the expedition is active, a crossed-out eye means it is inactive, and a cross symbol means it is archived. Notice that for archived expeditions, all options except "Clone Expedition" are greyed out and unavailable.

5 Thank volunteers and provide feedback

Our volunteers want to know what happens to their transcribed data and how their work is being used. At the end of your expedition, please post an update on the expedition forum and/or an Institution Message to all volunteers who participated in the expedition to congratulate and thank them. The update could include information such as:

- How many volunteers participated;
- An acknowledgement of those volunteers who made exceptional contributions (you can see your top contributors at the bottom of your expedition page);
- Interesting finds;
- Common mistakes;
- How the data will be used in the future; and/or
- A big vote of thanks etc.

Volunteers contribute thousands of unpaid hours of time and the least we can do is thank them for their time and provide them with some information.

Example of an update to expedition contributors:

Superb Parrot in the ACT update

By Michael Mulvaney, ACT Parks and Conservation Service, December 2019.

Thanks to the magnificent 49 volunteers who identified the images in the last three projects I have processed. I am continually impressed by how good you helpers are at making correct identifications. In the last 10,000 or so images you correctly identified the 12 images of Noisy miners, the 18 Red-rump parrots and the 10 Striated pardalote. The projects involved three separate hollows in which Superb parrots had bred in 2015. In this year of study, 2016, Superb parrots bred in two of the hollows and Crimson rosellas in the third. Despite this Starlings (3115 images), Crimson rosellas (2763 images) and Brushtail possum (1438 images) were more numerous than the 1338 images of Superb parrots.

I bet prior to helping the Superb Parrot in the ACT project, most of you thought of Brushtail possums as cute vegetarians, particularly those that came across the image of mother and bub captured in one recent project? Sorry if you found the 1300 or so images of the Brushtail possum delving into a tree hollow and pulling out a nesting Crimson rosella and eating it head-first a bit gruesome. Given that it was a hollow in which Superb parrots had previously nested, possums are a real threat to nesting Superb parrots. This is of particular interest as the trees in which these parrots are breeding will shortly be within a predator proof fence behind which cats and foxes will be eradicated – good for wildlife- but this may lead to an increase in the Brushtail possum population, so we need to consider what we can do to manage this. On Kangaroo Island where the Brushtail possum was found to be eating the chicks and eggs of Glossy black cockatoos they placed possum barriers around the base of trees. Another theoretical possibility is to place “lids” over hollows with holes that allow Superb parrots to pass through but exclude possums. What your DigiVol work tells us is that we need to take the issue seriously.

6 Promote the progress and outcomes of your expeditions through DigiVol

Our volunteers have told us when they hear details about how their DigiVol work contributes to scientific output, it motivates them to volunteer more! We love to share your project outcomes and research with our DigiVol community.

6.1 DigiVol newsletter contributions

We send a regular monthly e-newsletter to all DigiVol members and we welcome your contributions. Our newsletters typically include:

- DigiVol updates;
- Information about new expeditions;
- Project updates, especially when projects are complete;
- Links to scientific studies and papers that DigiVol transcriptions contribute to;
- Links to media articles;
- Latest campaigns, events and initiatives;
- Member profiles; and/or
- Acknowledgement of members who make a significant contribution.

6.2 Social media

If you promote the progress or outcomes of your DigiVol expeditions on social media, please use our social media handles: [Facebook](#) @AMDigiVol [Twitter](#) @AMDigiVol and use #digivol. We like to share and retweet DigiVol related posts from our institutions.

6.3 Scientific papers

If you publish any scientific papers which utilise data processed through DigiVol, please let us know so that we can share this information with our volunteers via e-newsletters and social media. Many of our volunteers are well-educated and retired with a thirst for and time to peruse such information. We understand that papers may be published sometime after the transcription work was completed on DigiVol and that is OK.

Please remember that any publications which mention DigiVol should include the following acknowledgement:

DigiVol is a collaboration between the Australian Museum and the Atlas of Living Australia.

6.4 Media articles

Similarly, if any media articles are published about your work which mentions DigiVol or DigiVol volunteers, please send them through to us for sharing. Please remember that any media articles about your DigiVol expedition or outcomes should include the same acknowledgement.

7 Are you stuck?

If you are having problems, don't worry, help is not far away:

DigiVol Coordinator
Digital Collections and Citizen Science
Australian Museum Research Institute
Australian Museum
1 William Street Sydney NSW 2010 Australia

Email: digivol@australian.museum

FREQUENTLY ASKED QUESTIONS

I have registered but I am confused how to start

After you have logged in to DigiVol, scroll down on the front page past the black banner and you will see all the expeditions there is to choose from. Alternatively, go straight to the Expeditions tab at the top of the page and select an expedition that you would like to work on. On the front page of your selected expedition click on the 'View tutorial' button to learn how to complete the task. It is a good idea to keep the tutorial open in a separate browser tab so that you can keep referring to it. Once you have read the tutorial you can click the 'Get started' button to start transcribing.

I have forgotten my password.

Click on the Login tab on the front page of DigiVol. Type in your email address and then click on the Forgot password? link.

Which browser is best for DigiVol?

DigiVol is optimised for Google Chrome. Although it will work well on most internet browsers, it will work best on Chrome.

I am not sure if I am doing this properly?

If you see that a task is too tricky for you to complete, you are best not to even start transcribing and instead use the 'Skip' button and go on to the next task. If a task is really hard to transcribe but you can do most of it, complete as much information as you can but always refer to the expedition tutorial as it will tell you what you need to do if a word is unreadable. You can also leave a note in the 'Your Notes' field for the validator (i.e., the person who checks your work). Or you can ask questions on the DigiVol Forum. If you are finding all the tasks in an expedition too hard to decipher, you might like to try a different expedition. Once your tasks have been validated you may be contacted by the project lead if you are continuously making the same mistakes.

How can I see the work I have submitted/How can I edit my mistakes?

You need to be logged in to DigiVol to see the tasks you have completed. You can see the work you have submitted in the My Profile tab at the top of the home page, clicking on the



arrow and then selecting Notebook. Your transcribed tasks will appear at the bottom of your Notebook page. We do not generally encourage you to fix your own errors as it can be difficult to search your tasks, especially those that were completed some time ago. In addition, our validators (people who check your work) have tricks up their sleeves to enable them to efficiently find and fix multiple errors. However, if you do need to edit a recent record you can find it in your notebook page and click on the 'View' button on the right-hand side of the task. Please note, once a task has been validated, it cannot be edited further.

How can I become a validator?

If you have been doing exceptionally well in your transcriptions, a project leader may email you and invite you to become a validator. They will then give you access to validate their projects.

I can't see any Australian Museum projects.

Volunteers on DigiVol are very fast and our onsite volunteers who photograph the Australian Museum's collections cannot keep up! New projects are being posted all the time so keep an eye out or work on an alternative project.

Who can I contact if I need to ask a question?

The DigiVol Forum is a great place to ask questions. Your questions will be answered by expert volunteers, project leaders and/or DigiVol staff. You can post a forum question directly from your task by clicking on the 'Create Forum Topic' button in the top right of the page. Alternatively, you can email DigiVol@australian.museum.

Is there a limit to how much I volunteer?

No, you can volunteer for as long (or as little) as you like! We value everybody's contributions no matter how big or small.

I do not live in Australia. Can I still volunteer for DigiVol?

Yes, so long as you have a PC and internet access you can volunteer from anywhere in the world! In fact, 17% of DigiVol volunteers are not based in Australia. Many of our international volunteers are recruited through other institutions who use our platform such as the Royal Botanic Gardens Kew and the Natural History Museum of Utah.



I have photos and I would like them to be digitised on DigiVol!

Please see “Is DigiVol suitable for my project?” for further information.

How do I get achievements on DigiVol?

You can see a list of badges that you can earn here:

<https://digivol.ala.org.au/leaderBoard/describeBadges>

You can also compete to have your name appear on our Leader Board:

<https://digivol.ala.org.au/leaderBoard/topList?category=daily&institutionId=>

<https://digivol.ala.org.au/leaderBoard/topList?category=weekly&institutionId=>

<https://digivol.ala.org.au/leaderBoard/topList?category=monthly&institutionId=>

<https://digivol.ala.org.au/leaderBoard/topList?category=alltime&institutionId=>

Can I use my DigiVol volunteering for Centrelink mutual obligations?

We are currently at capacity for our Centrelink mutual obligations volunteering program. If you would like to go onto our waitlist, please email digivol@australian.museum.

Can I complete my Duke of Edinburgh volunteering with DigiVol?

This program is currently under review, and we won't be taking any new volunteers in 2022. Please check back in early 2023 for further details.

Can I use DigiVol volunteering for credit with my university or other volunteering programs?

DigiVol does not record time spent transcribing, which makes it difficult to verify number of hours spent for these programs. Therefore, we cannot verify whether or not you have completed your hours as per the requirements of your volunteering program.

How do I get better at transcribing old handwriting?

Individual authors have their personal characteristics, so the best guide is to compare with earlier transcriptions. In the same expedition, click on another transcriber's name, find a task from the same expedition, click the blue number at the beginning of the task row or 'view' at the end of the task row (they show the same transcribing but in different formats.) Getting a piece of scrap paper and trying to copy the letters can also help.



For further resources, try:

<https://www.youtube.com/watch?v=utZN0E4h0sw>

https://files.nc.gov/dnrcr-archives/documents/files/State_Archives_TranscribeNC_Handwriting_Guide_0.pdf

<https://www.nationalarchives.gov.uk/palaeography/>

I made a great suggestion to improve the functionality of the DigiVol platform, but nothing happened.

DigiVol is an application of the Atlas of Living Australia (ALA). ALA do a fantastic job of overseeing all the technical aspects of DigiVol. If an issue or change is presented to us, we add it to our list and think about the ramifications of making such a change and assess the level of priority against other works. The ALA programmers group their work in batches and that is when changes are implemented from our 'list'. So, unless the issue effects a critical part of the functionality of the DigiVol platform the change may take some time to take effect, if at all. This can be frustrating for our volunteers, but please do keep letting us know of your suggestions for improvement. They are valuable and we do take them onboard even if we can't act on them immediately.