Adding images to the World Auchenorrhyncha Database

1. General documentation on Editing data in TaxonWorks is available here: https://docs.taxonworks.org/guide/

2. This guide will focus specifically on Adding images to Taxa. All changes should be immediately visible in publica pages: https://hoppers.speciesfile.org

3. Two versions of the database will be available for you:
   a. Practice database: https://sandstorm.taxonworks.org/ (you can do anything you want in the database, create delete, modify any record in the database, this is similar to production database, but keep in mind that all changes are not permanent and could be deleted any time, this version is specifically designed to practice any interfaces)
   b. Production database: https://sfg.taxonworks.org/ (that is the primary database for the work)

4. The first time you enter any of the database, you will need to request a password recovery using your current email address. After creating your own password, you should be able to log in to the database. Please select the database for editing "World Auchenorrhyncha database"

5. Before adding the images, one preliminary step is needed, in the search box search for "Observation matrix hub"
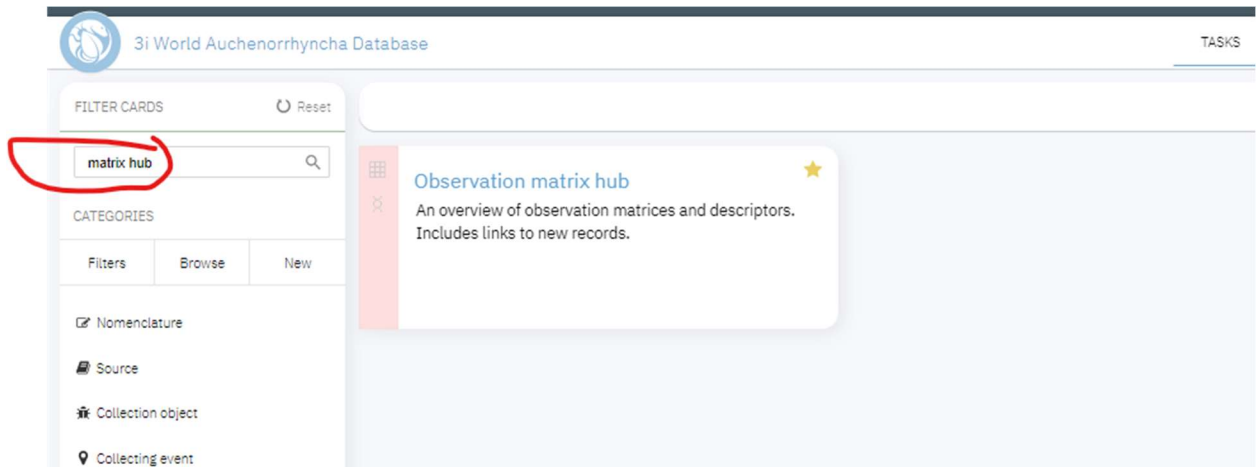


6. Open the task and scroll down to the matrix named "Illustrations". Click to the pin button next to it. It should turn to red, like on the illustration. There are many matrices in the database, but all pictures and photos for the taxa go to this matrix. We pin it, so that the system will know your preference and will be readily available in future steps.

| | | | | | | |
|---|---|---|---|---|---|---|
| Typhlocybinae | 123 | 186 | View | Edit | Interactive key | |
| Tribe Scaphoideini Oman, 1943 | 130 | 209 | View | Edit | Interactive key | |
| Illustrations | 12082 | 28 | View | Edit | Image matrix | |
| Matrix of Athysanini | 146 | 210 | View | Edit | Interactive key | |
| Scaphytopius | 261 | 58 | View | Edit | Interactive key | |
| | | | | | Interactive | |

7. Click on the database name at the top left, this will return you to the HUB, or primary interface of the database where you can select another task.
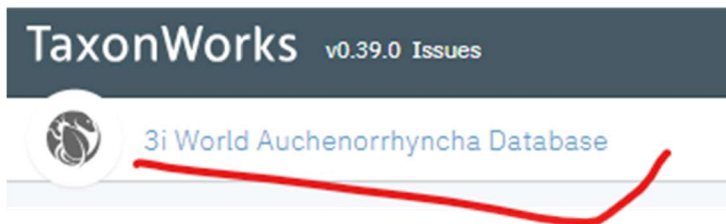


8. Our main working interface will be another task called "Browse nomenclature and classification". If you do not see it on the screen, just use a search box. You can star the task, and it will be added to the list of your Favorite task, which could be a faster way to find it in the future.
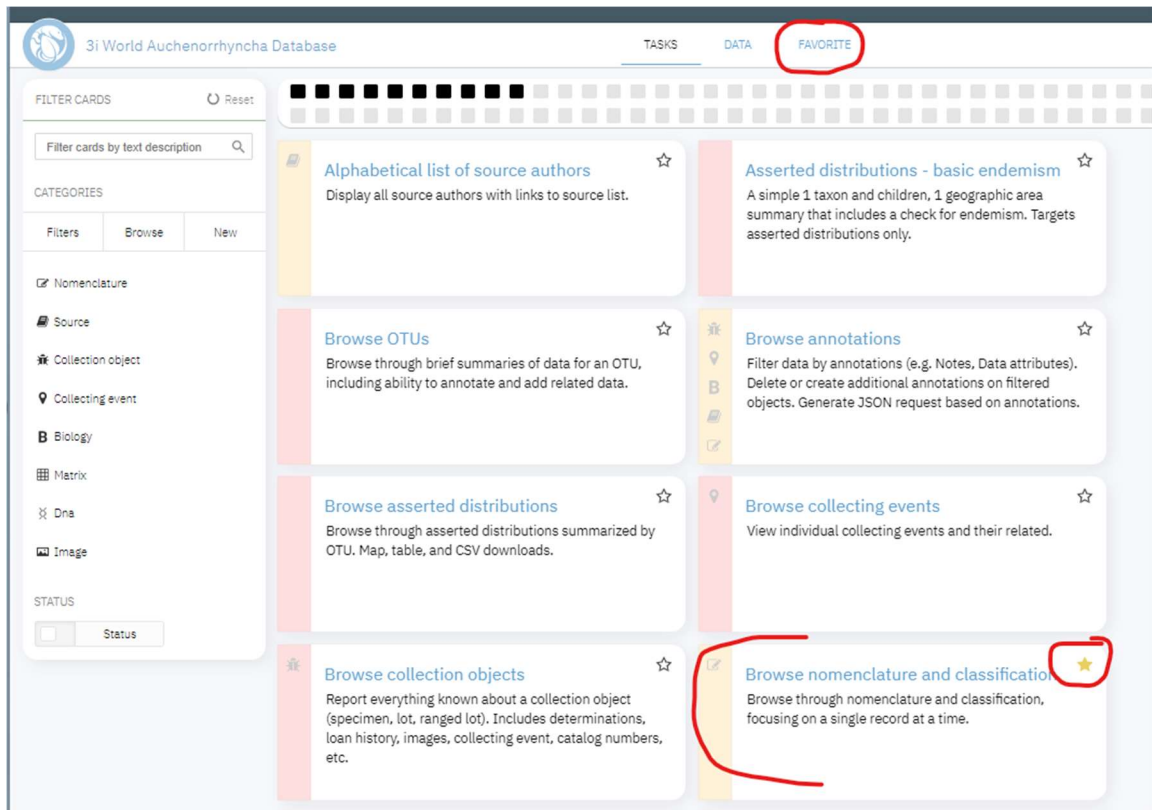
9. Browse nomenclature one of two interfaces to see the history of the name, another one is called "Browse OTU" which besides the history will show additional information on a taxon (distribution, images, biological associations, etc.)

10. In the Browse nomenclature, you can search any name. You can use partial search as well.

**Browse nomenclature and classification**

11. When you make a search you will see that some names are marked with a green checkmark, those are valid names; red cross is for invalid name, and [c] is for a subsequent combination. Regardless of what you select, the system will redirect you to a valid name for this taxon. You can confirm this by the title of the page, when the name is loaded to the browser.
12. Switching to "Browse OTU". Use the first button at the top right, you will see images and biological information. Clicking the same button again will return you to the Browse Nomenclature mode. I would suggest to do most of the work in Browse Nomenclature mode.

13. To add photos or illustrations, the second button will be used, it is called OTU quick forms, and it will open a menu for selection.

14. Once you opened Observation matrices menu, click on the blue Pin button next to the search box, It will add this particular taxon to the Illustration matrix, which we selected as a default at step 6. Do not click on any other matrix name, because it will add this taxon to other matrices, where it is not supposed to be. By default, you will add the valid name into the matrix, if you need to add images for a synonym, you can find a synonym name in the Browse nomenclature, in the list of synonyms for a particular name, click on the name of the synonym, see that the title of the page change, so when you add Taxon to the Observation matrix, the synonym name will be added instead of the valid name.

15. When taxon added to the matrix, you will have a new browser tab open with a table for numerous morphological characters where we put standard images of the insects, if you work with photos, probably the first four characters could be useful: Habitus, dorsal view; Habitus, lateral view, Head, Live specimen, but you are welcome to use any characters which are appropriate for your research.

16. To add the photo to the table, just drag and drop the image from you computer folder to the appropriate cell in the table. You can bring more than one picture to the same cell, and you can move images from cell to cell.

17. The caption of the image will always come from the character of this cell, but if you want to add some additional information, click on the image in the cell, and you will be able to add caption, for example sex or type status. Click the Save button. To close the popup image, click Esc button.

Label

acoustically proven specimen

18. I would also recommend adding attribution to the photo. To do this use the first button under the image, which is Radial annotator button.
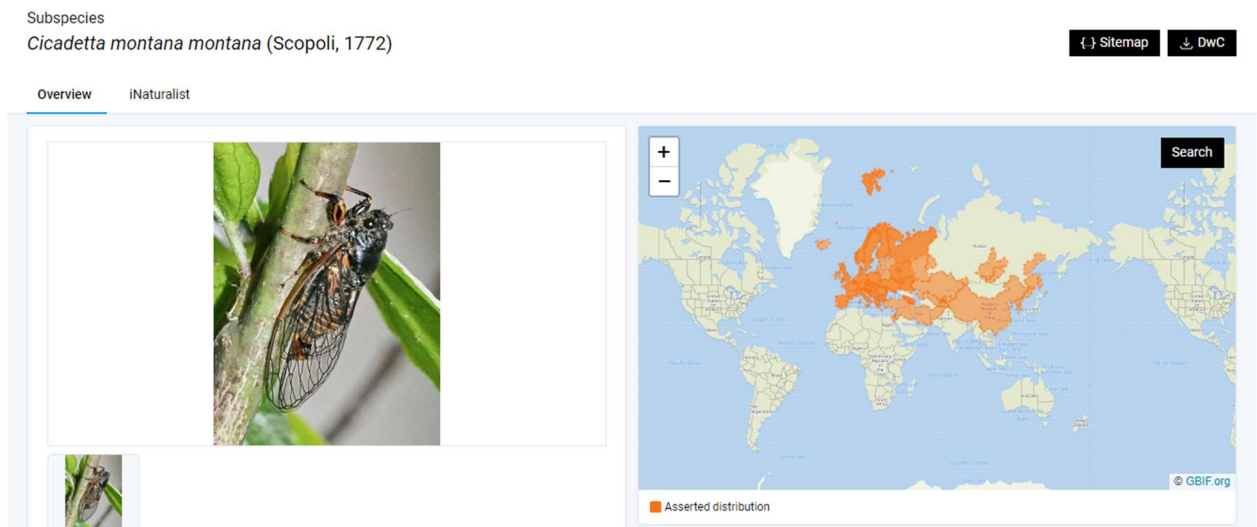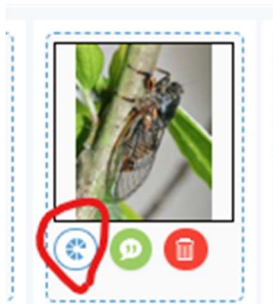
19. Select the Attribution sector of the menu. Put the license, I would recommend CC-BY or CC-0 license. Year when the photo was taken, after that you can select a creator and/or copyright holder. Most of the people publishing on Auchenorrhyncha should be already in the DB, just search in the format "Last Name, First name" or "Last name, Inicials". If the system does not find the name, you should be able just to click the button to create a new one. Once attribution is entered, click the save button, and Esc to close the Radial annotator menu.
20. If the image comes from the publication, I usually add the citation. In the same radial annotator, I select a different sector, Citations. I can search for the publication, add the page number, and select "Is original", this is to indicate that the image was originally published in this particular publication. Click save button and Esc. To close the menu.
21. The image could be preview either in Browse OTU interface or on https://hoppers.speciesfile.org



22. To add images to another taxon, follow the steps 10-21.