

Uploading Skeletal Data Records

This is the procedure for uploading skeletal data records that have been created in an Excel worksheet during barcoding. If you have used the template on the macroalgae.unh.edu website, the field names at the top of each column will match the field names in the portal and make it easier to create an upload profile. Minimally, your file should contain the barcode, Genus and Species for each specimen in the columns headed “catalognumber”, “genus” and “specificEpithet”. Your barcode file should be saved as a .csv file using the Excel File->Save As menu choice. The file should have the original template headings at the top of each column and should not contain any blank rows or any information other than the data itself. You can delete any columns that you have not used.

1. Login to Macroalgae.org
2. Click “Search Collections” and click on your collection
3. Click on the pencil icon in the upper right corner
4. Click on “Import/Update Specimen Records”
5. If you have not uploaded data before, you will need to create an Upload Profile. Do do this, click on the green + (plus sign).
6. From the Upload Type pull-down, select File Upload.
7. Give it a title like “XYZ Default Upload Profile”, where XYZ is you herbarium code. You can actually name this anything you want.
8. Click Create Profile.
9. Click on the button for the profile you just created.
10. Click “Initialize Upload...”
11. Click “Choose File” and navigate to where you saved the .csv file with your skeletal data records. Click on the file and click “Open”.
12. Click “Analyze File”
13. Select the field containing the specimen barcode as the “Source Unique Identifier / Primary Key”
14. A field mapping box will open. You can click the Automap Fields button at the bottom and the program will make its best guess at mapping your fields, but check each one carefully and correct those that are wrong. If you have used the template from macroalgae.unh.edu, it should work pretty well. It is critical the Source Field containing your barcode is mapped to the Target Field “catalognumber”.
15. Click on “Save Mapping” and then “Start Upload”.
16. It will go through some cleaning procedures to look for duplicates, null records and other problems. When it has finished, if the upload number of records looks correct, click on “Transfer to Central Specimen Table”. Confirm it by clicking “OK”.
17. That’s it. Go back to your collection page (Search Collections, select your collection) and the collection statistics should reflect the new records.