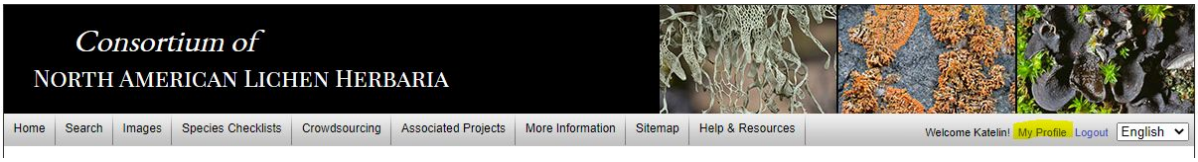
Guide for Entering Skeletal Data

Goal: This document describes how to access and use the skeletal data entry form in a Symbiota portal. This tool can be used to create a record for specimens with no data in the portal or that are missing any of the skeletal fields listed below.

1. Log in to your Symbiota portal (Bryophytes: https://bryophyteportal.org/portal/, Lichens: https://lichenportal.org/cnalh/). If you do not already have an account, click New Account and create a profile. Contact your supervisor at your institution or a portal manager (Bryophytes: CNABH.help@gmail.com, Lichens: CNALH.help@gmail.com) for appropriate editing permissions.

2. Click My Profile in the top right corner of the page (see screenshot below).

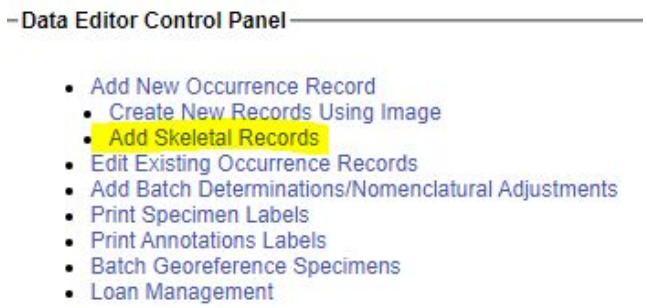


3. Click the Specimen Management (Occurrence Management) tab (see screenshot below).

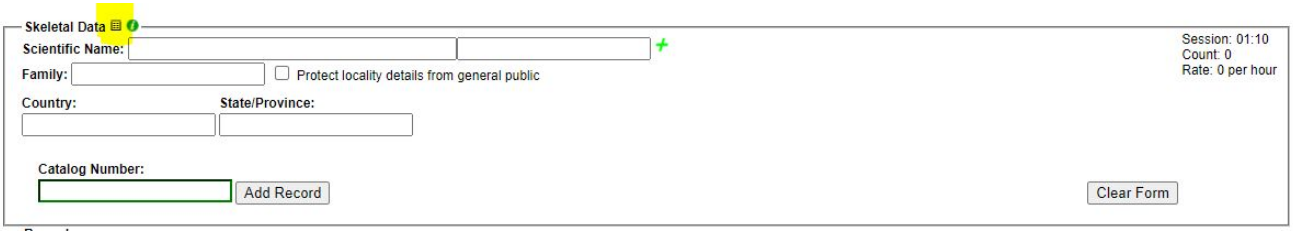


4. In the resulting Collection Management list, click the name of the collection for which you will be entering skeletal data.

5. Click Add Skeletal Records in the resulting Data Editor Control Panel (see screenshot below).

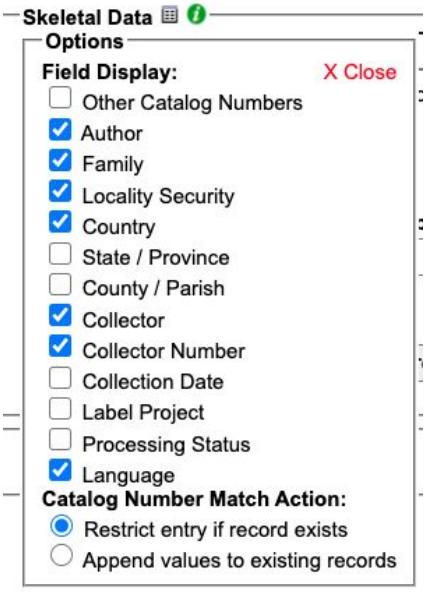


6. On the next page, the following fields should be visible in the Skeletal Data box: Scientific Name, Family, Country, State/Province (optional for skeletal data), and Catalog Number (see screenshot below).



7. Click the Display Options button, highlighted in yellow in the screenshot on the previous page.

8. From the dropdown options (see screenshot on the right), check the following boxes for all the data that wasn't captured as skeletal data during your imaging workflow. Check: Author, Family, Locality Security, Country, Collector, Collection Number (or Collection Date if specimens do not have collection numbers), Language, and Exsiccate (coming soon). Make sure that the Catalog Number Match Action is set to "Restrict entry if record exists." Then click Close.



9. Begin to type the **Scientific Name** of your first specimen from the most recent annotation, if not a type specimen, in the Scientific Name field. When the dropdown list appears, select the correct scientific name from the list. Then press the Tab key or click into the Country field.
    - If the scientific name cannot be found in the dropdown list, carefully transcribe the scientific name (genus and specific epithet only) *exactly* as it appears on the label.
    - The **Locality Security** box will be automatically checked if the species name is on any of the rare species lists.

10. Begin to type the **Country** of your first specimen in the Country field. When the dropdown list appears, select the correct country from the list. Then press Tab.
    - Make sure that the country information that you enter applies to *where the specimen was collected* rather than the herbarium where the specimen is held.
    - If you cannot determine the country where the specimen was collected, leave this field blank.

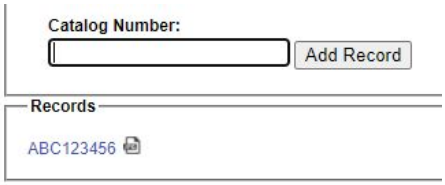
11. Type the **Collector's Name** from the specimen label as completely as possible. When there are two or more collectors listed, put the first name listed on the label in this field. Then press Tab.

12. Type the **Collector Number** given on the specimen label. Then press Tab.
    - If no number is given, please add the Collection Date since this will enable searching for duplicate specimens.

13. Begin to type to the name of the **Language** the label is written in, if it can be determined. When a dropdown list appears, select the correct language from the list.
    - If you cannot determine language, leave this field blank.

14. Click the **Catalog Number** field or press Tab twice to move to this field.

15. Scan the barcode of the specimen and ensure that this value appears in the Catalog Number field or type the barcode number in and press Enter or click Add Record (see screenshot on the right).



    - This record will now be listed in the Records box below the Skeletal Data box. If you see an error in this list, you can click the catalog number of the record and edit the record in the pop-up window.

16. Move to the next specimen in your stack. **Verify that the values in the Skeletal Data box also apply to the next specimen you are entering (i.e., the specimen is the exact same taxon and was collected in the same country, by the same collector).** If any of the fields do not apply, change the value in the appropriate field before scanning the specimen.
    - You may press the Clear Form button to empty all fields when appropriate.

17. Repeat steps 9-16, changing the values in each field of the Skeletal Data box when appropriate.