Uploading a .csv to the MyCoPortal

- 1. Log onto <u>http://mycoportal.org/portal/index.php</u> with credentials.
- 2. Go to My profile, select Specimen Management, and select collection related to upload.



3. Underneath Administration Control Panel, select Skeletal File Upload

dmiı	histration Control Panel
	Edit Metadata and Contact Information
•	Update Statistics
•	Manage Permissions
	Import/Update Specimen Records
	 Quick File Upload
	Skeletal File Upload
	Processing Toolbox
	Darwin Core Archive Publishing
	Review/Verify General Specimen Edits
-	Data Cleaning Tools
•	Duplicate Clustering
•	Duplicate Clustering
•	Download Backup Data File

4. Within the Data Upload Module, choose the .csv file you wish to upload.



5. Hit Analyze File.

Home	Explore	Crowdsource	Checklist Projects	Other Resources		
Home >> Collection Management Panel >> List of Upload Profiles >> Specimen Loader						
Data Upload Module						
University of Illinois Herbarium Last Upload Date: 08 July 2015 12:00:00						
(Step 1)						
Choose File exsi_test.csv						
Automap fields						
Analyze File						

6. The following table maps the institution's .csv headers (Source Field) with the Symbiota headers (Target Field.)

Fields highlighted in yellow indicate that the Source Fields do not automatically match with the Target Fields. This could be due to misspelling, mislabeling, or institutional preferences in the original .csv.

Data Upload Module

Skeletal File Upload				
Source Field	Target Field			
cordnumber	recordnumber \$			
scordedby	recordedby \$			
Duntry	country \$			
punty	county \$			
ay	day ‡			
enus	genus ÷			
thercatalognumbers	othercatalognumbers +			
atalogid	Select Target Field +			
ionth	month ‡			
pecificepithet	specificepithet +			
ateprovince	stateprovince \$			
ear	year ÷			
Mappings that are not yet saved are displayed in Yellow				
Verify Mapping Automap Fields				
f Match on Catalog Number				
Match on Other Catalog Numbers				
 Incoming skeletal data will be appended only if targeted field is empty If both checkboxes are selected, matches will first be made on catalog numbers and secondarly on others catalog numb 	ers			

Skeletal Files consist of stub data that is easy to capture in bulk during the imaging process. This data is used to seed new records to which images are linked. Skeletal fields typicall similar to recular uploads though differ in several ways. Example of field-mapping errors.

Using the down bar under "Select Target Field," select the corresponding header. Consult http://www.microfungi.org/files/1814/5592/1113/Darwin_Core_fields_Sy mbiota.pdf for aid in determining the correct Symbiota header.

- 7. Hit the "Start Upload" button in the lower left-hand corner of your screen.
- 8. On the next page, the "Final transfer" box will list three numbers. 'Occurrences pending transfer' is the number of records on your .csv. This should match the number of 'New records.' 'Records to be updated' should be zero. If it is not zero, it means that there are records on your .csv with catalog numbers that match records already on the MyCoPortal (you have duplicates). There will be a small, square icon next to the number that, when clicked, will open a table of records. This table will show which records have duplicate catalog numbers. Fix the catalog numbers that are duplicates to make them unique numbers, then save your .csv again and return to Step 4. Once the numbers for 'Occurrence pending transfer' and 'New records' match, and 'Records to be updated' is zero, move to Step 9 and complete the upload.
- 9. Hit "Transfer Records to Central Specimen Table" and then "OK".

Home Explore Crowdsource Checklist Projects Other Resources Acknowledgements								
Home >> Collection Management Panel >> List of Upload Profiles >> Specimen Loader								
Data Upload Module								
University of Illinois Herbarium Last Upload Date: 08 July 2015 12:00:00	The page at mycoportal.org says: Are you sure you want to transfer records from temporary table to central specimen table?							
Upicad Status: Initiating data upload for file: ILL_skeletal_29June2015.csv Olearing staging tables Beginning to load records Data cleaning: Cleaning sountry and state/provinceDone! Cleaning country and state/provinceDone! Cleaning condinatesDone! Record upload complete, ready for final transfer and activation	Cancel							
Final transfer Occurrences pending transfer: 113 Records to be updated: 113 New records: 0								
Click to review specimen records								