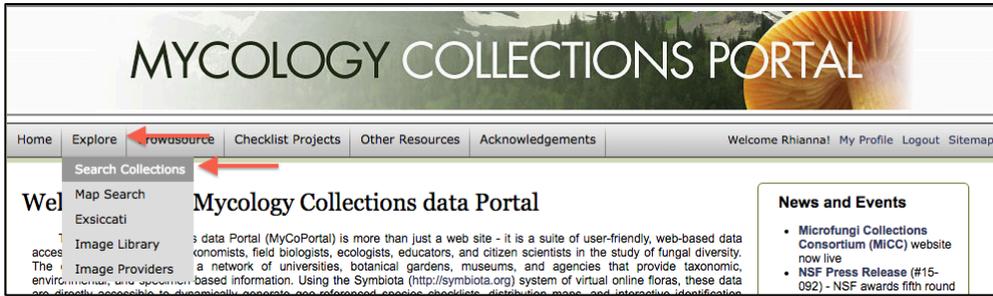


# Checklists: What they are, what they are for, and how to make them

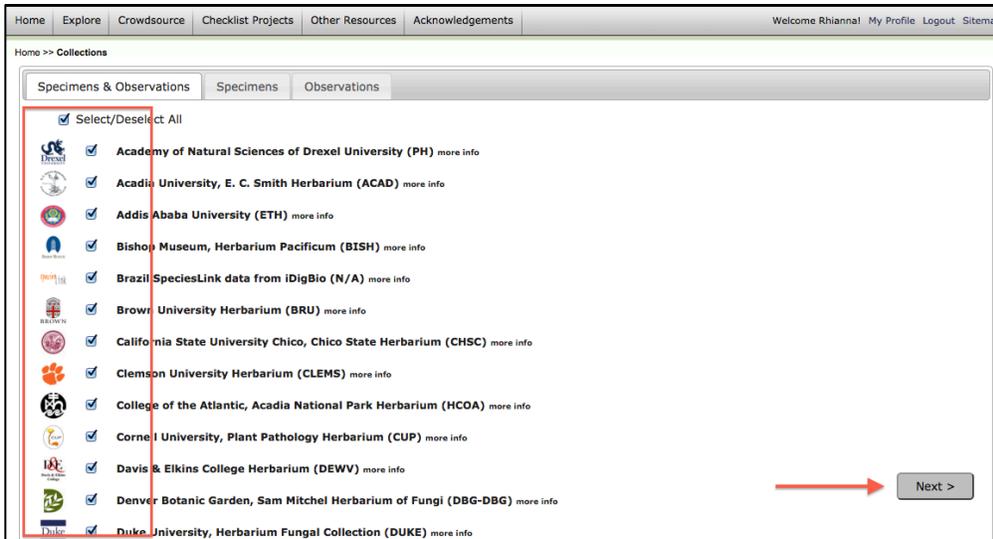
## Dynamic Checklist:

This checklist will be the most up to date. It is created when you search for a specific institution, location, collector, time period, etc. The list will contain all vouchered specimens within the search parameters.

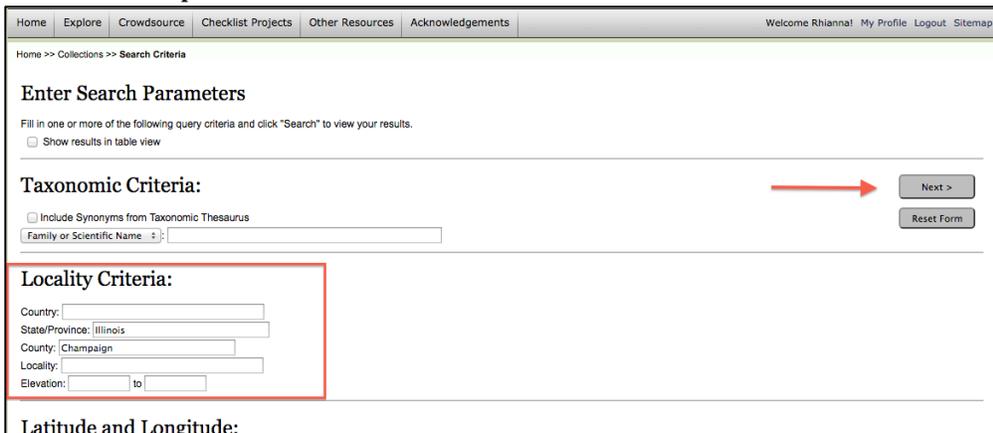
1. "Explore" → "Search Collections"



2. Select desired institution(s) → "Next"



3. Enter search parameters → "Next"



- The resulting list will contain all current vouchered specimens that are within the given search parameters. You can view a list of the species or occurrence records, as well as a map that will show data points for all specimens that have geocoordinates associated with their records.

Home >> Collections >> Search Criteria >> Specimen Records

Species List Occurrence Records Maps

**Dataset:** All Collections  
**Search Criteria:** Illinois; Champaign

See Results in Table View Copy URL to These Results

1 2 3 4 5 6 7 8 9 10 >> Last Page 1, records 1-100 of 6520

**Academy of Natural Sciences of Drexel University**

	<i>Albugo candida</i> (Pers. ex J.F. Gmel.) Kuntze PH00300517 A. B. Seymour 45b 29 May 1880 USA, Illinois, Champaign, Urbana <b>Full Record Details</b>	
	<i>Melampsora medusae</i> Thüm. PH00317832 M. B. Waite s.n. 20 September 1889 USA, Illinois, Champaign, Champaign <b>Full Record Details</b>	
	<i>Microsphaera ravenelii</i> Berk. PH00302582 A. B. Seymour 955 22 September 1879	

- Selecting the “Species List” tab will bring up the list of species – the Taxonomic Filter allows you to choose how the data will be displayed, the first yellow box will pull up the checklist, the second yellow box brings you to a taxonomic key, and the third yellow box allows you to export the data.

Home Explore Crowdsourcing Checklist Projects Other Resources Acknowledgements Welcome Rhianna! My Profile Logout Sitemap

Home >> Collections >> Search Criteria >> Specimen Records

Species List ← Occurrence Records Maps

**Taxonomic Filter**  Raw Data  Index Fungorum  MycoBank

**Taxa Count: 2061**

**AGARICACEAE**

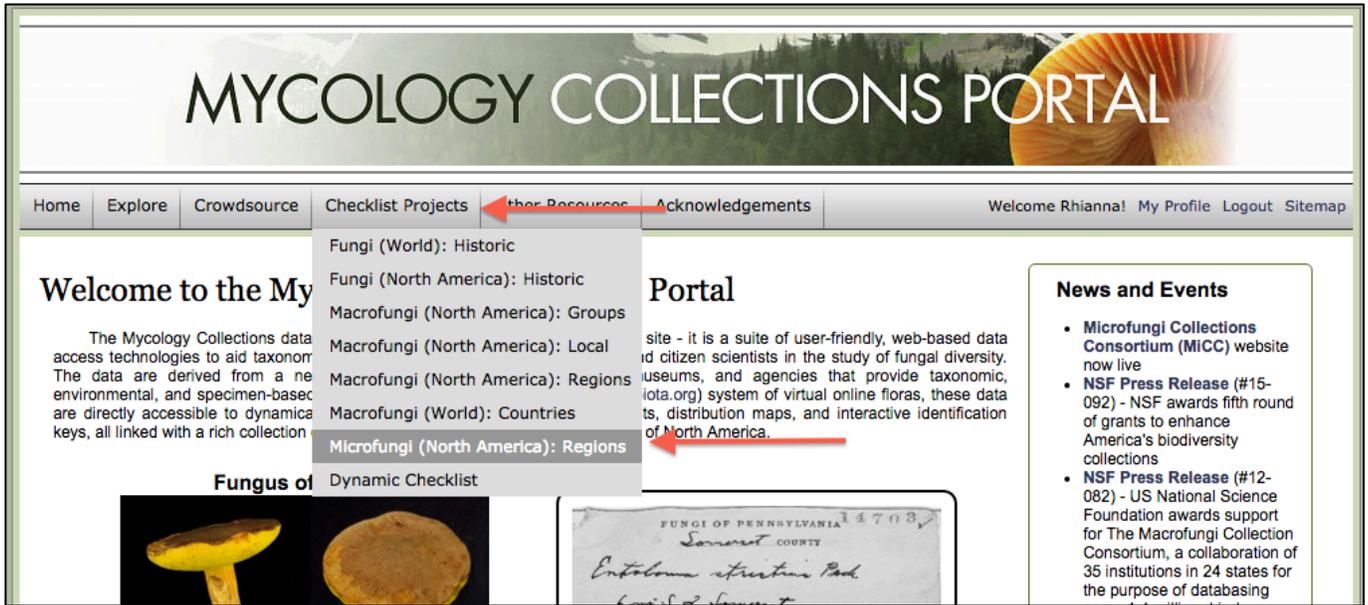
- Agaricus (psaliota?)*
- Agaricus arvensis*
- Agaricus campester*
- Agaricus campestris*
- Agaricus haemorrhoidarius*
- Agaricus placomyces*
- Agaricus rodmani*
- Agaricus siloicola*
- Agaricus subbrupescens*
- Agaricus sylvaticus*
- Arachnion album*
- Bovista pila*
- Bovista plumbea*
- Calvatia bovista*

**Static Checklist:**

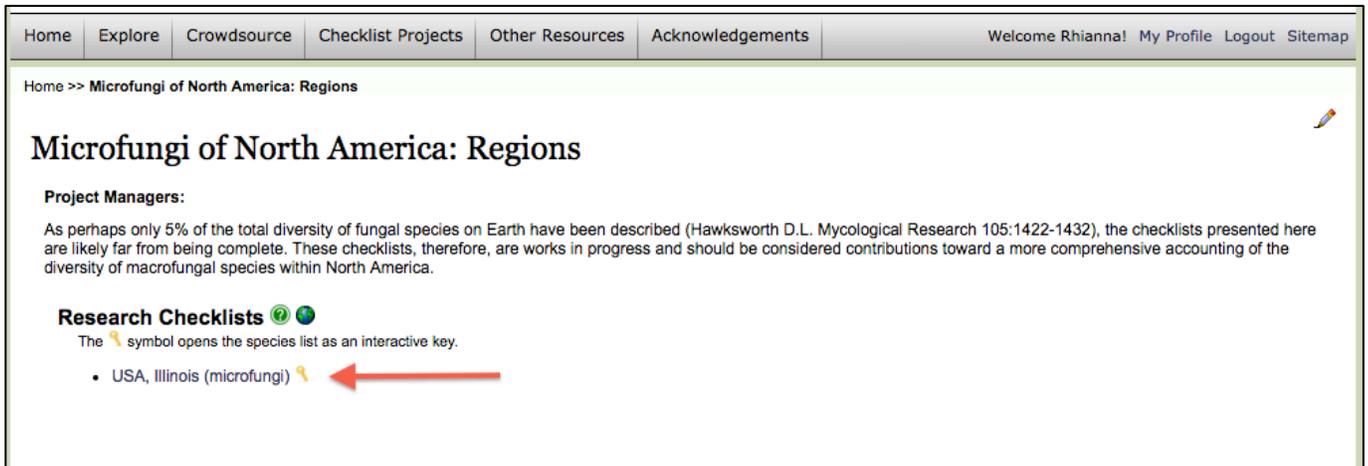
Static checklists, on the other hand, are created manually and may or may not be backed up by current vouchered specimens on the portal. It can be a useful tool if you want to always have a list readily available at all times (and with a specific URL), if you want species notes that are always available, etc.

How to view Public Checklists:

1. From the Home page, hover over “Checklist Projects,” then select the category most closely related to the checklist you are interested in viewing.



2. Select the checklist.



## 3. View the checklist.

- a. In the Options box on the right side, you can search the list as well as choose how to view the list:
  - i. Selecting “Notes and Vouchers” will allow you to distinguish which species have been associated with vouchered specimens on MyCoPortal
  - ii. The search feature allows you to narrow your list down (letting you search by taxon, for example)
  - iii. “Filter” allows you to choose the taxonomic filter
  - iv. Select “Display as images” and then “Rebuild list” to display the images associated with each species.
- b. By selecting the key icon, you can view the interactive key associated with the specimens in that checklist.

Home > Microfungi of North America: Regions > USA, Illinois (microfungi)

**USA, Illinois (microfungi)**

Authors:  
More Details

Families: 31  
Genera: 87  
Species: 357 (species rank)  
Total Taxa: 351 (including subsp. and var.)

**Family Incertae Sedis**  
*Cacumisporium capitulatum*  
*Rhynchosporium secalis*

**AMPHISPHERACEAE**  
*Cryptostictis inaequalis*  
*Cryptostictis paeoniiae*  
*Cryptostictis violae*  
*Discosia artocreas*  
*Discosia magna*  
*Discosia potentillae*  
*Discosia rugulosa*  
*Lepteutypa fockelii*  
*Monochaetia desmazieri*  
*Monochaetia hysterialiformis*  
*Monochaetia mali*  
*Monochaetia uncinata*  
*Pestalotia adusta*  
*Pestalotia foedans*  
*Pestalotia heucheriae*

**Options**

Search:

Common Names  
 Synonyms

Filter:  
Original Checklist ▾

Common Names  
 Display as Images  
 Notes & Vouchers  
 Taxon Authors  
 Show Taxa Alphabetically

Rebuild List

How to create a Static Checklist:

1. Log on, “My Profile” → press the green cross by “Checklists assigned to your account”

Home Explore Crowdsourcing Checklist Projects Other Resources Acknowledgements Welcome Rhianna! My Profile

Species Checklists Specimen Management User Profile

**Checklists assigned to your account**

- Fungi of Brazil
- Fungi of Wichita County, Texas
- Multiclavula specimen
- Taxa Collected by Lawrence William Nuttall
- Taxa Collected by Lawrence William Nuttall in Nuttallburg, WV

**Inventory Project Administration**  
There are no Projects for which you have administrative permissions

2. Input as much information as you have about the checklist you are creating.
- Checklists for specific localities should be named uniformly from least specific (country) to most specific (in this case, Champaign County). It is important to add this extra, broad information about the checklists to give other people an idea of where the location is. For example, if my checklist is “Meadowbrook Park,” only I would know what park that refers to. However, the name “USA, Illinois, Champaign County, Urbana, Meadowbrook Park” is much more explicit.

The screenshot shows the 'Create a New Checklist' form. The 'Checklist Name' field is highlighted with a red box and contains the text 'USA, Illinois, Champaign County'. Other fields include 'Author', 'Checklist Type' (set to 'General Checklist'), 'Locality', 'Citation', 'Abstract', 'Notes', 'Latitude Centroid', 'Longitude Centroid', 'Point Radius (meters)', 'Polygon Footprint', 'Parent Checklist' (set to 'None Selected'), and 'Access' (set to 'Private'). A 'Create Checklist' button is at the bottom.

- Most of this information can be edited after the checklist is done – one important exception is “Parent Checklist.” This dropdown list allows you to associate your checklist with existing checklists. In this case, it may be helpful to associate my new Champaign County list with an older list including the whole state of Illinois.

The screenshot shows the 'Parent Checklist' dropdown menu. The menu is open, displaying a list of existing checklists. The 'USA, Illinois (macrofungi)' option is highlighted in blue. Other options include 'Gastrom & other earthstar species', 'Lycopodium & other puffball species', 'Morchella - morels mushrooms', 'Tulostoma & other stalked puffball species', 'Amanitoid mushrooms (deathcap, grisette, etc.)', 'Boletoid mushrooms (Boletes)', 'Canadai, Quebec (macrofungi)', 'Coprinoid mushrooms (inky caps)', 'Frick Park', 'Fungi of Argentina: gasteroid and seotoid taxa', 'Fungi of Bolivia', 'Fungi of Brazil', 'Fungi of Ecuador: the Galapagos Islands', 'Fungi of Wichita County, Texas', 'Hyphoporioid mushrooms (weary caps)', 'Lactarioid mushrooms (milk caps)', 'Macrofungi of New York City', 'Macrofungi of Santa Cruz County', 'Macrofungi of Woolly Hollow State Park', 'Michigan Mushroom Hunters Club', 'Multiclavus specimen', 'Mycenoid mushrooms (fairy helmets)', 'Mycophora of Lassen Volcanic National Park', 'NAMA Foray Vouchers - Comprehensive Checklist', 'NE Texas Checklist', 'North America (macrofungi)', 'Parasitic Fungi of Montana', 'Phalloid mushrooms (scallops, etc.)', 'Rocky Mountain National Park', 'Taxa collected by Charles Leonard Smith in Nicaragua', 'Taxa Collected by Lawrence William Nuttall', 'Taxa Collected by Lawrence William Nuttall in Nuttallburg, WV', 'Taxa described by Alexander Haschek Smith', 'Taxa described by Charles Horton Peck', 'Taxa described by Harry Delbert Thiers', 'Taxa in Murrill's North American Flora', 'Tricholomatoid mushrooms (Trichs, matsutake, etc.)', 'USA, Arizona (macrofungi)', 'USA, California (macrofungi)', 'USA, Colorado (macrofungi)', 'USA, Colorado: Aspen (macrofungi)', 'USA, Colorado: Rocky Mountain National Park (macrofungi)', 'USA, Hawaiian Islands (macrofungi)', 'USA, Illinois (macrofungi)', 'USA, Indiana, La Porte Co.: Red Mill County Park (macrofungi)', 'USA, Indiana, St. Joseph Co.: Ellet Park, Goshute Park and Recreation (macrofungi)', 'USA, Maine (macrofungi)', 'USA, Minnesota (macrofungi)', 'USA, New Jersey: Pine Barrens (macrofungi)', 'USA, New Mexico (macrofungi)', 'USA, New York: Adirondack Mountains (macrofungi)', 'USA, New York: Long Island (macrofungi)', 'USA, Northeast (macrofungi)', 'USA, Ohio (macrofungi)', 'USA, Oregon (macrofungi)', 'USA, Utah (macrofungi)', 'USA, Washington (macrofungi)', 'USA, West Virginia (macrofungi)', and 'WPMC - Salamander Park, Pittsburgh, PA'.

- c. "Access" can be set to Private or Public. It's advisable to keep it Private until completed, and then set it to Public if desired

Species Checklists | Specimen Management | User Profile

Checklists assigned to your account +

Create a New Checklist

Checklist Name  
USA, Illinois, Champaign County

Authors

Checklist Type  
General Checklist

Locality

Citation

Abstract

Path: p

Notes

Latitude Centroid Longitude Centroid Point Radius (meters) Polygon Footprint  
Create footprint polygon.

Parent Checklist: None Selected

Access  Private  Public

Create Checklist

- d. Press "Create Checklist." Now, whenever you are editing the checklist, you can press the pencil icon with the "A" beside it (upper right hand corner) to edit the checklist description.

Home | Explore | Crowdsourcing | Checklist Projects | Other Resources | Acknowledgements

Welcome Rhianna! My Profile Logout SiteMap

Home >> USA, Illinois, Champaign County

**USA, Illinois, Champaign County**

Authors:

Families: 0  
Genera: 0  
Species: 0 (species rank)  
Total Taxa: 0 (including subsp. and var.)

No Taxa Found

Options

Search:

Common Names  
 Synonyms

Filter:

Original Checklist  
 Common Names  
 Display as Images  
 Notes & Vouchers  
 Taxon Authors  
 Show Taxa Alphabetically

Rebuild List

Add New Species to Checklist

Taxon:  
Acanthostigma occidentale  
Acanthostigma occidentale

Habitat:

Abundance:

Notes:

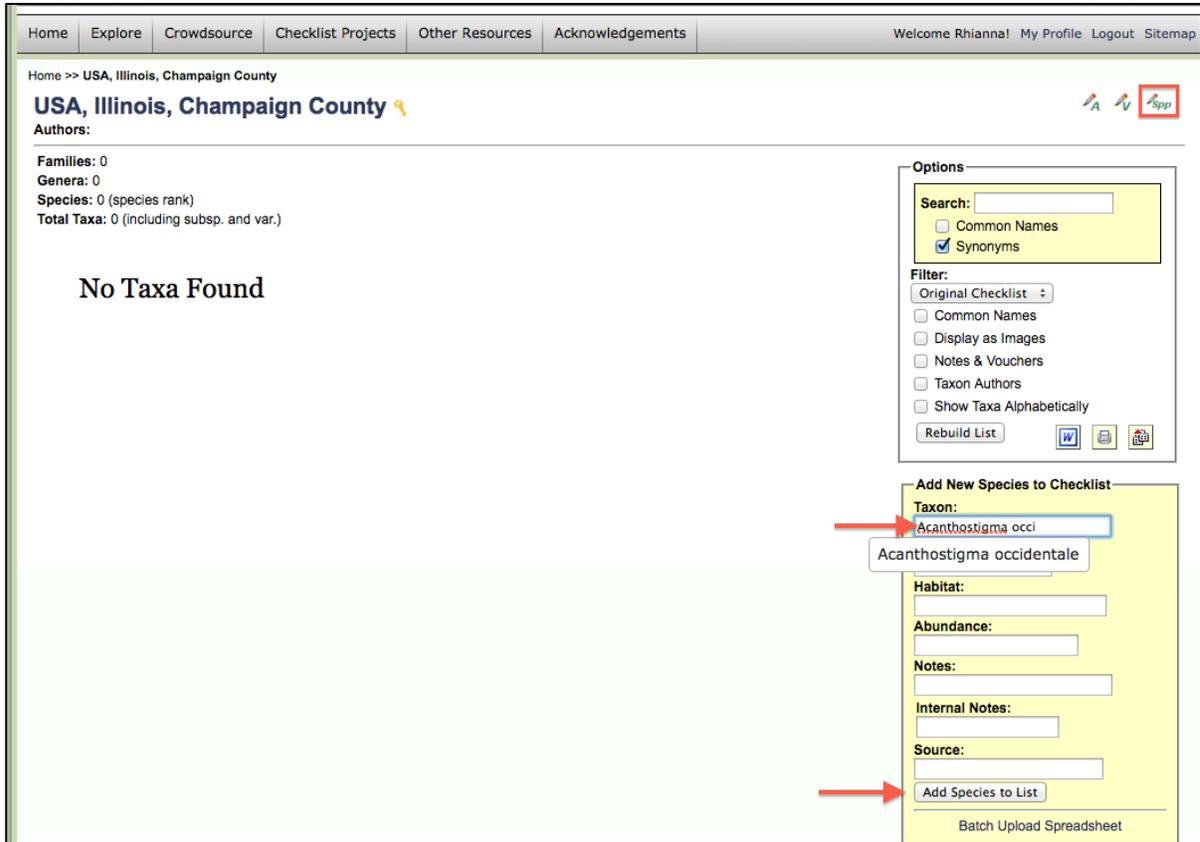
Internal Notes:

Source:

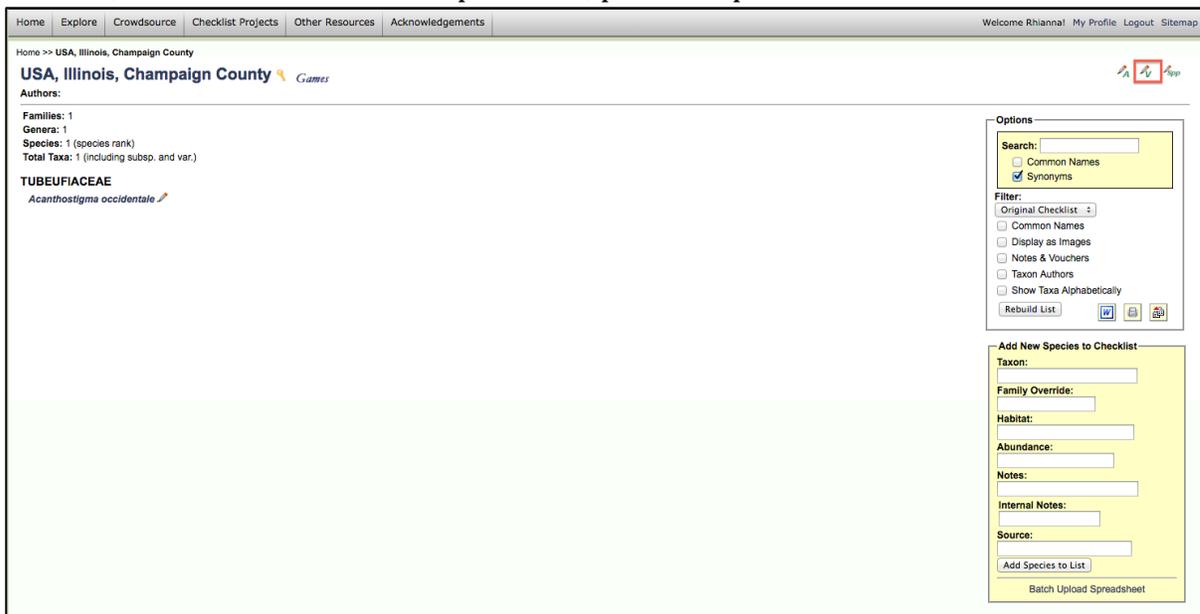
Add Species to List

Batch Upload Spreadsheet

3. Add species to your checklist. This can be done in a couple of different ways. If you want to individually add a specific list of specimen to your checklist:
  - a. Press the pencil icon with "spp" beside it. This will bring up the box that says "Add New Species to Checklist"- input the desired taxon/other information and select "Add Species to List."



- b. Now, to check for vouchered specimens, press the pencil with the "V"



- c. From here, type your search parameters (in this case, Illinois and Champaign County) and press “Save Search Terms.” This will pull up a list of vouchered specimens of the species in your checklist that match the search criteria. Check the box next to each name and select “Add Vouchers.”

Home >> Return to Checklist >> Checklist Administration

### USA, Illinois, Champaign County

**Edit Search Statement**

To use the voucher administration functions, it is first necessary to define a search terms that will be used to limit occurrence records to those collected within the vicinity of the research area.

Country:       Lat North:

State:       Lat South:

County:       Long East:

Locality:       Long West:

Taxon:

Collection:

Collector:

Include Lat/Long and locality as an "OR" condition

Only include occurrences with coordinates

Exclude cultivated species

Home   Explore   Crowdsourcing   Checklist Projects   Other Resources   Acknowledgements   Welcome Rhianna!   My Profile   Logout   Sitemap

Home >> Return to Checklist >> Checklist Administration

### USA, Illinois, Champaign County

state: Illinois; county: Champaign

New Vouchers   Missing Taxa   Voucher Conflicts   Reports

**Taxa without Vouchers: 1**      Display Mode: Occurrences for non-vouchered taxa

Listed below are occurrences that can be batch linked to species within the checklist.

<input type="checkbox"/>	Checklist ID	Collector	Locality
<input type="checkbox"/>	Acanthostigma occidentale	A.B. Seymour 6607 1895-11-03 [no catalog number]	United States; Illinois; Champaign County; Urbana.

Add name using current taxonomy

- d. Now you are back at your checklist. Under “Options” → “Filter,” press “Notes & Vouchers” then “Rebuild List,” and the checklist will list the specimens and vouchers associated with those specimens.

Home   Explore   Crowdsourcing   Checklist Projects   Other Resources   Acknowledgements   Welcome Rhianna!   My Profile   Logout   Sitemap

Home >> USA, Illinois, Champaign County

### USA, Illinois, Champaign County

Authors:

Families: 1  
Genera: 1  
Species: 1 (species rank)  
Total Taxa: 1 (including subsp. and var.)

**TUBEUFACEAE**  
*Acanthostigma occidentale*  
A.B. Seymour 6607 ILL1

**Options**

Search:

Common Names  
 Synonyms

Filter:

Original Checklist:

Common Names  
 Display as Images  
 Notes & Vouchers  
 Taxon Authors  
 Show Taxa Alphabetically

Simple Map  
Advanced Map

If you want to batch upload a list of species names:

- a. create a .csv file with the columns “sciname,” “family,” “habitat,” “abundance,” and “notes” (sciname is required, the other columns are optional)

	A	B	C	D	E
1	sciname	habitat	notes		
2	Amanita citrina	Mixed hardwood forest	2017 Annual Local Foray		
3	Armillaria mellea	Mixed hardwood forest	2017 Annual Local Foray		
4	Armillaria tabescens	Mixed hardwood forest	2017 Annual Local Foray		
5	Bisporella citrina	Mixed hardwood forest	2017 Annual Local Foray		
6	Chlorociboria aeruginascens	Mixed hardwood forest	2017 Annual Local Foray		
7	Clavaria zollingeri	Mixed hardwood forest	2017 Annual Local Foray		

- b. In the “Add New Species to Checklist” box, select “Batch Upload Spreadsheet”

- c. From here, select “Choose File,” then “Upload Checklist.”

**USA, Illinois, Champaign County**

**Authors:**

Checklist Upload Form

**Checklist File:**  No file chosen

First line contains header

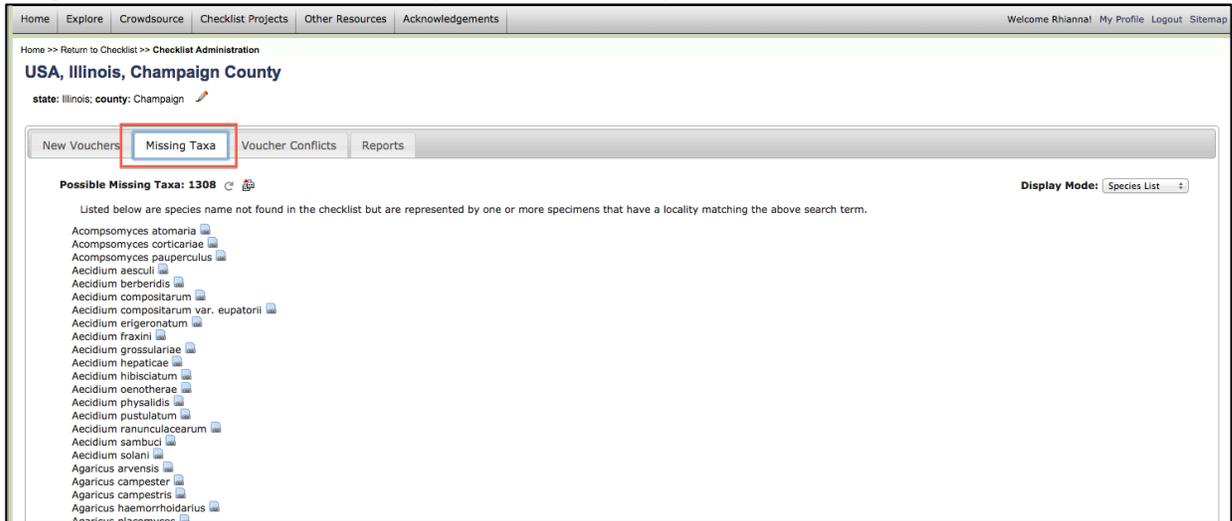
Taxonomic Resolution:

Must be a CSV text file that follows one of the following criteria. Note that Excel spreadsheets can be saved as a CSV file.

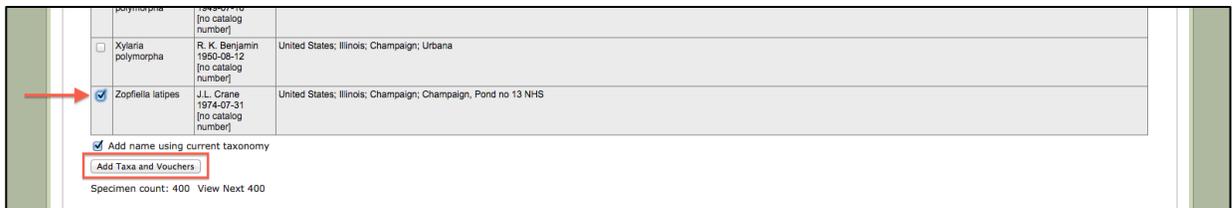
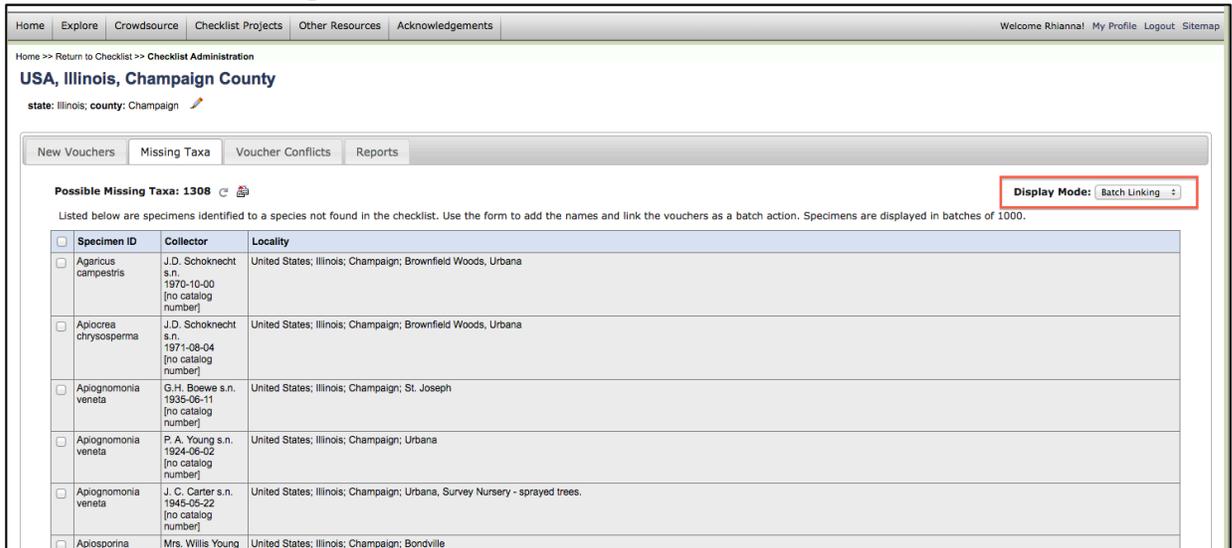
- First column consisting of the scientific name, with or without authors
- First row contains following column names (in any order):
  - sciname (required)
  - family (optional)
  - habitat (optional)
  - abundance (optional)
  - notes (optional)

If, on the other hand, you are populating your checklist based on certain criteria:

- a. Press the pencil with the “V” and add the search parameters, but now go to the “Missing Taxa” tab. This will show you all of the vouchered specimens that match those search parameters (similar to the Dynamic Checklist).



- b. Changing the “Display Mode” from “Species List” to “Batch Linking” will allow you to easily add as many or as few of these vouchered specimens to your checklist. Check the box next to the record, then press “Add Taxa and Vouchers” at the bottom.



- Once you have added species to the checklist, you can also add notes to those species. By selecting the pencil icon with "SPP," more pencil icons will pop up next to each species name. Press those to bring up a dialogue box in which you can type in notes that will appear next to the vouchered specimen.

Home >> USA, Illinois, Champaign County

**USA, Illinois, Champaign County** *Games*

Authors:

Families: 2  
 Genera: 2  
 Species: 2 (species rank)  
 Total Taxa: 2 (including subsp. and var.)

**LASIOSPHAERIACEAE**  
*Zopfiella latipes* ✎ ←

**TUBEUFIAEAE**  
*Acanthostigma occidentale* ✎ ←

**Options**

Search:

Common Names  
 Synonyms

**Filter:**  
 Original Checklist ▾  
 Common Names  
 Display as Images  
 Notes & Vouchers  
 Taxon Authors  
 Show Taxa Alphabetically

Rebuild List   

**Add New Species to Checklist**  
 Taxon:

## *Zopfiella latipes* of USA, Illinois, Champaign County

General Editing | Voucher Admin

**Edit Checklist Information**

Habitat:

Abundance:

Notes:

Editor Notes:

Source:

Family:

Override:

---

**Rename Taxon / Transfer Vouchers**

New Taxon Name:

\* Note that vouchers & notes will transfer to new taxon

---

**Delete**

- Repeat as many times until your checklist is complete! Once you are confident in the list, you can request for the MyCoPortal team to add it to one of the Checklist Projects so that it is easily accessible. Without being added to a specific project, you (and other editors of the list) will have access and can share a URL for the list, but other users will not be able to find the checklist by browsing the portal. [Note: you will continue to be able to edit the list as necessary even after it is added to a Checklist Project].

The screenshot shows the MyCoPortal interface for a checklist project. At the top, there are navigation tabs: Home, Explore, Crowdsourcing, Checklist Projects, Other Resources, and Acknowledgements. The user is logged in as 'Welcome Rhianna! My Profile Logout Sitemap'.

The main content area is titled 'Home >> USA, Illinois, Champaign County'. Below this, it says 'USA, Illinois, Champaign County' with a location pin icon and the word 'Games'. Underneath, it lists 'Authors:' followed by a list of families and species:

- Families:** 2
- Genera:** 2
- Species:** 2 (species rank)
- Total Taxa:** 2 (including subsp. and var.)

Two families are listed:

- LASIOSPHAERIACEAE**
  - Zopfiella latipes* (J.L. Crane 1974-07-31 [ILLS])
- TUBEUFIAEAE**
  - Acanthostigma occidentale* (A.B. Seymour 6607 [ILL])

On the right side, there is an 'Options' panel with a search bar and several checkboxes:

- Common Names
- Synonyms

Below the search bar is a 'Filter' section with a dropdown menu set to 'Original Checklist' and several checkboxes:

- Common Names
- Display as Images
- Notes & Vouchers
- Taxon Authors
- Show Taxa Alphabetically

At the bottom of the Options panel is a 'Rebuild List' button and three icons for social media or sharing.

At the bottom right, there is a map of Champaign, Illinois, showing the University of Illinois Urbana-Champaign and surrounding areas. The map is titled 'Simple Map' and 'Advanced Map'.