

Editing Existing Occurrence Records

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- My Profile → Specimen Management → the collection being edited

To edit individual occurrence records:

- Under the **Data Editor Control Panel**, select **Edit Existing Occurrence Records**
- Search for the Catalog Number and edit any part of the occurrence record needed.
- Click Save Edits at the bottom of the occurrence record to save your changes.

To batch edit fields with identical information in a given set of records:


- This tool allows you to batch update fields in a given set of records. For example, if you notice a collector's name is misspelled, you can search for the misspelling and replace with the correct spelling for those records.
- Under the **Data Editor Control Panel**, select **Edit Existing Occurrence Records**
- Search for the data you wish to change, then select **Display Table**.
- Select the pencil icon to the right of the collection name.

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Home >> Collection Management >> Occurrence Record Table View | 1-1000 of 31545 records >>

Symbiota ID	Catalog Number	Other Catalog #	Family	Scientific Name	Author	Collector	Number	Associated Collectors	Event Date
2648854	NEB0040004	25998	Leguminosae	Acacia albicoma	Kellogg	Thurman	100	Max Quesada	1978

- Select the appropriate **Field name**, type in the **Current Value** that you wish to change, and the **New Value**, then select **Batch Update Field**. You can match on the whole field or any part of the field. For example, to correct a Collector's name from "Smitg" to "Smith", select "Match Any Part of Field".

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Batch Update

Field name:

Current Value:

New Value:

Match Whole Field
 Match Any Part of Field

To batch edit unpopulated fields:

- This tool uses a CSV upload to add data to fields that are currently empty. If the field is already populated, the information will not be changed. For this reason, the CSV can have as few columns as the Catalog number and the field being added. This tool is a helpful method to minimize the chance of unintentionally overwriting data.





- Under Administration Control Panel, select **Skeletal File Upload**.
- **Choose File** (select desired CSV) → **Analyze File**
- Verify that all column headings match desired fields, then **Start Upload**.

To batch edit populated fields

- This method is identical to adding new occurrence records using a CSV (See Workflow Guide titled “Uploading a CSV”). The consequence is that it does not merely edit the record; it completely replaces it. This means that if the CSV does not contain ALL of the data currently in the record, that extra data will be lost. In order to lessen the chances of losing data, ensure that you have the most up-to-date records by downloading the specific occurrence records being edited.
 - **Explore** → **Search Collections** → Select specific collection → **Next**
 - Enter search parameters to narrow down the selection, and then **Search**.
 - Select the **Download Specimen Data** icon.

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

Species List Occurrence Records Maps

Dataset: NEB  

See Results in Table View

1 2 3 4 5 6 7 8 9 10 >> Last Page 1, records 1-100 of 31545

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- Select **Download Data**.
- Edit this CSV and re-upload in order to minimize the chances of losing information.