Uploading a .csv to the MyCoPortal


2. Go to My profile, select Specimen Management, and select collection related to upload.

3. Underneath Administration Control Panel, select Skeletal File Upload

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

Example of field-mapping errors.

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.”