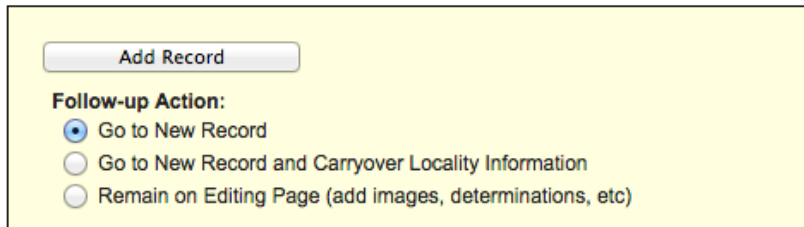


# Creating Occurrence Records

## Directly on the MyCoPortal

1. Log in to MyCoPortal
  - a. Go to “My Profile” → “Specimen Management” → Choose the collection you wish to add a record to → “Add New Occurrence Record.”
2. Populate as many fields as possible using the specimen label information, but the MINIMUM are the Scientific Name (Genus and species) and Catalog Number (Barcode) fields.
3. Change “Processing Status” to “Stage 1” or “Stage 2,” depending on level of transcription.
4. Click “Add Record” (make sure “Follow-Up Action:” is set to “Go to New Record”).



The screenshot shows a yellow rectangular box containing a button labeled "Add Record" and a section titled "Follow-up Action:". Below the title are three radio button options: "Go to New Record" (which is selected), "Go to New Record and Carryover Locality Information", and "Remain on Editing Page (add images, determinations, etc)".

## Creating .csv for Upload to the MyCoPortal

1. Open Excel
2. Use the top row of your blank spreadsheet for DarwinCore headers that correspond to the correct fields on the Occurrence Record ([http://www.microfungi.org/files/3514/7914/2616/Darwin\\_Core\\_fields\\_Symbiota.pdf](http://www.microfungi.org/files/3514/7914/2616/Darwin_Core_fields_Symbiota.pdf))
3. Enter the first two catalog numbers for your working batch of specimens, then highlight those two and drag down the spreadsheet. Excel will continue counting up for you.
4. There may be other fields you can fill in and drag down as well to save time. Some fields I fill in before I get started transcribing are:

country = USA

processingStatus = “Stage 2” → may occasionally change this to “Expert Required” for labels in non-English languages

basisOfRecord = “PreservedSpecimen” → at end of transcribing and before uploading, sort spreadsheet to put exsiccati together and change this to “Exsiccati”

5. Once .csv is complete, save and back up your file, then upload it to the MyCoPortal (See “Uploading a csv” guide on [www.microfungi.org](http://www.microfungi.org)).