# 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"
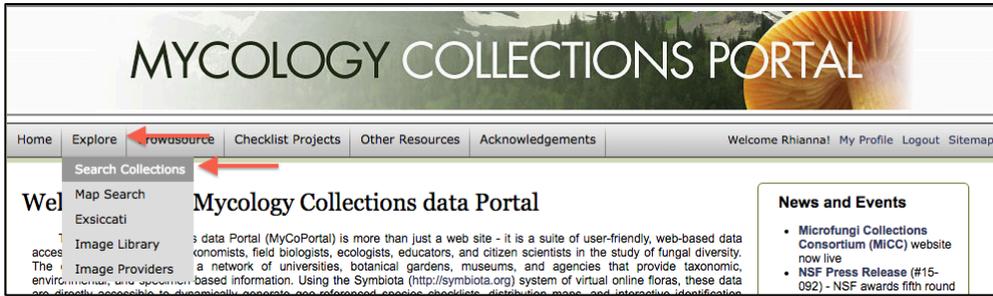
2. Select desired institution(s) → "Next"
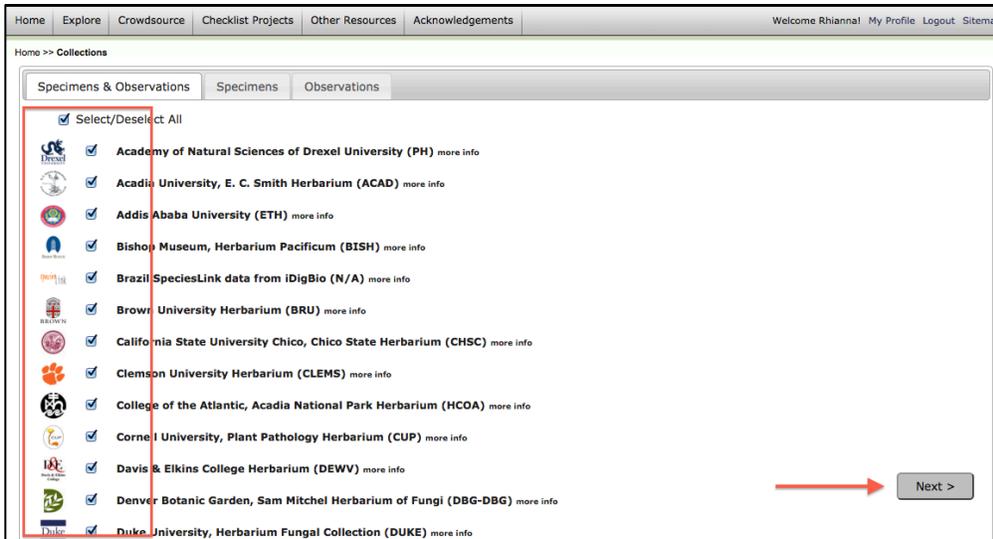
3. Enter search parameters → "Next"
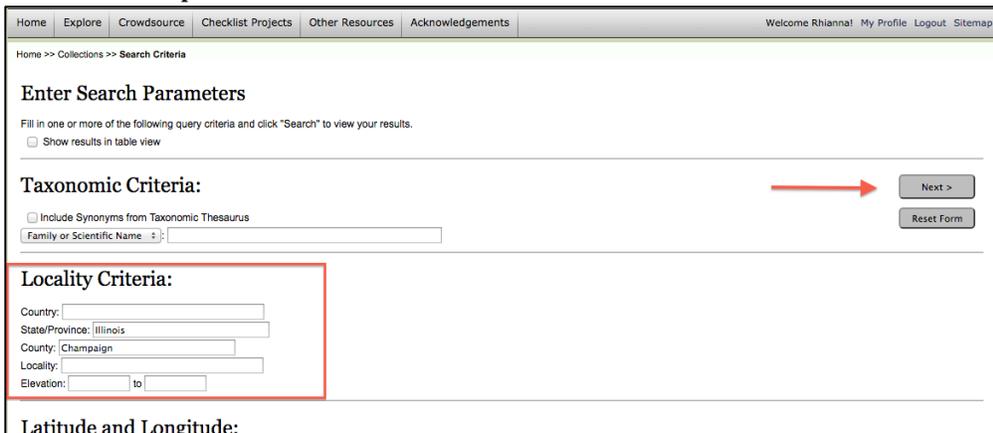
4. The resulting list will contain all current vouchered specimens that are within the given search parameters. You can view a list of the species or occurrence records, as well as a map that will show data points for all specimens that have geocoordinates associated with their records.

5. 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.

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.
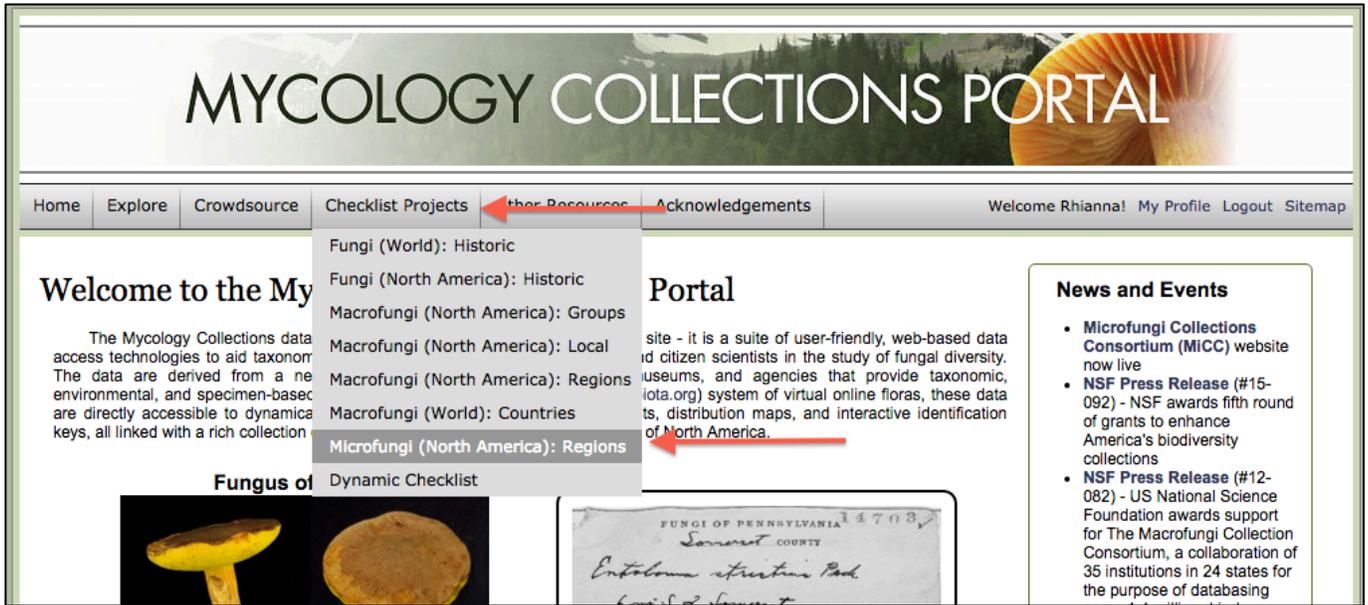
2. Select the checklist.
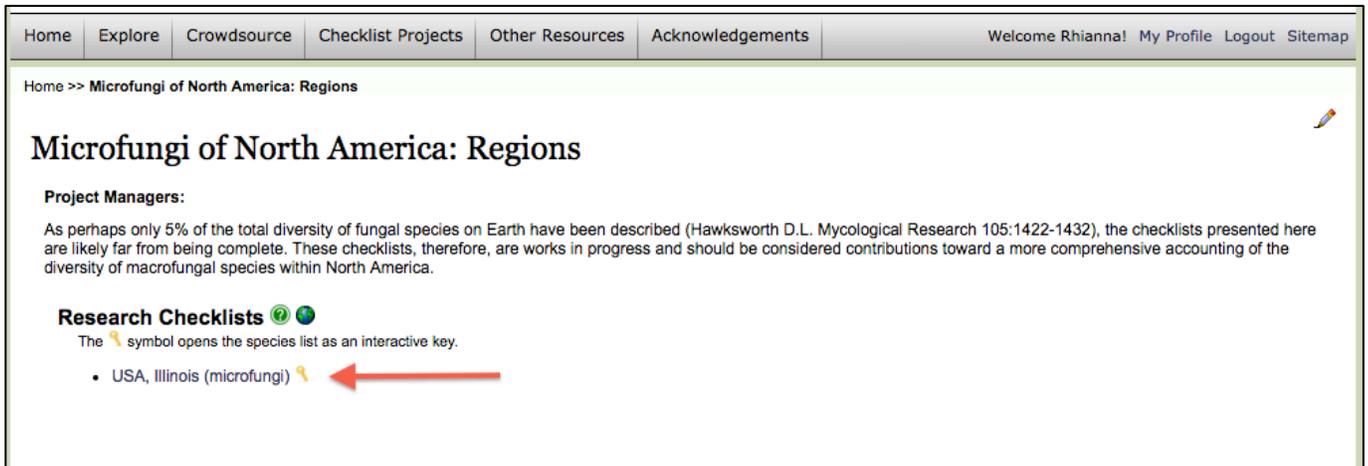
3. View the checklist.
    a. In the Options box on the right side, you can search the list as well as choose how to view the list:
        i. Selecting "Notes and Vouchers" will allow you to distinguish which species have been associated with vouchered specimens on MyCoPortal
        ii. The search 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.

How to create a Static Checklist:

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

2. Input as much information as you have about the checklist you are creating.
    a. 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.

    b. 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.

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

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.

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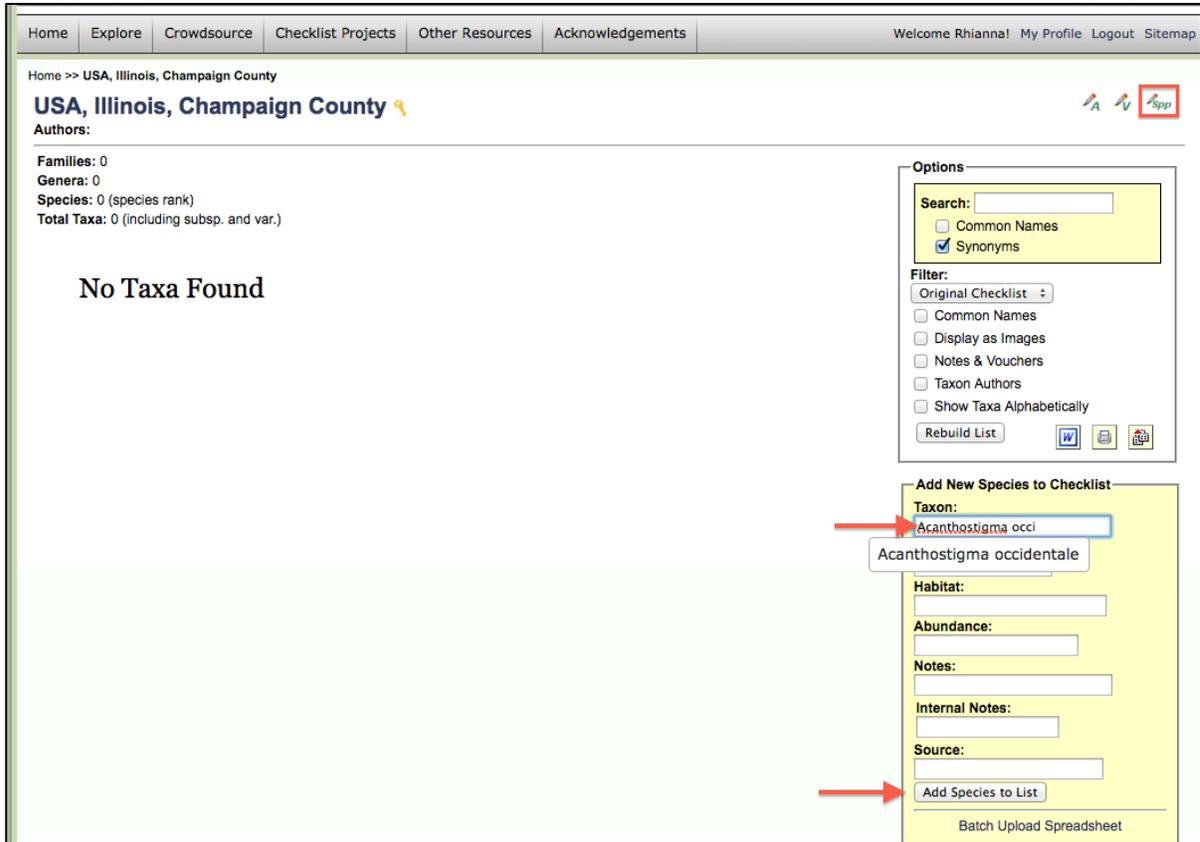
   b. Now, to check for vouchered specimens, press the pencil with the "V"
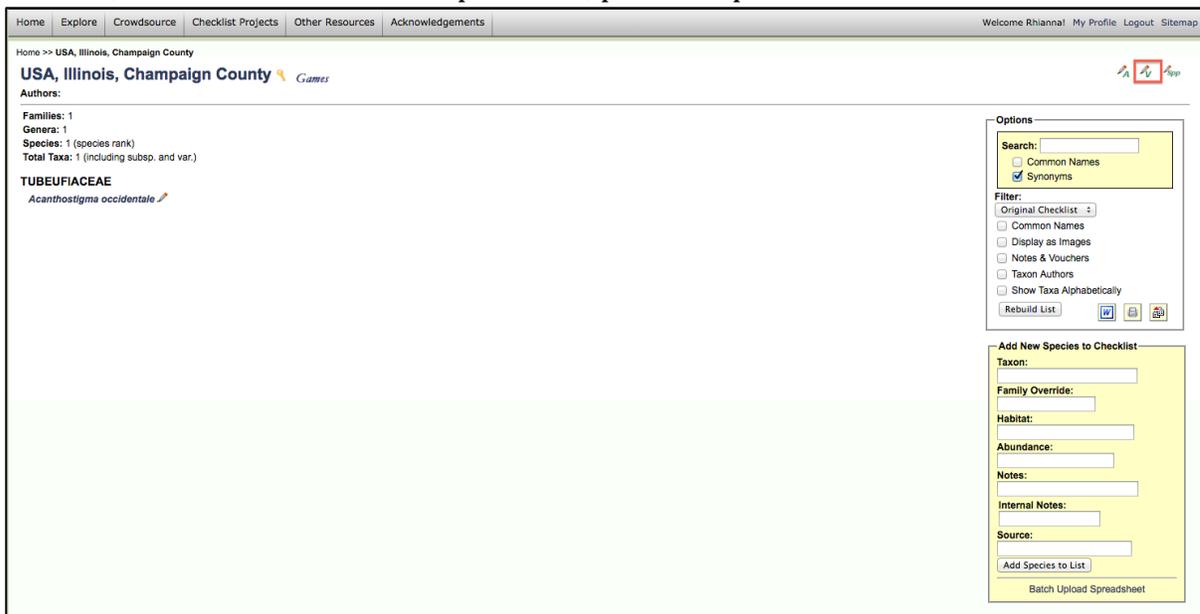
c. From here, type your search parameters (in this case, Illinois and Champaign County) and press "Save Search Terms." This will pull up a list of vouchered specimens of the species in your checklist that match the search criteria. Check the box next to each name and select "Add Vouchers."

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.

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)

b. In the "Add New Species to Checklist" box, select "Batch Upload Spreadsheet"

c. From here, select "Choose File," then "Upload Checklist."

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).
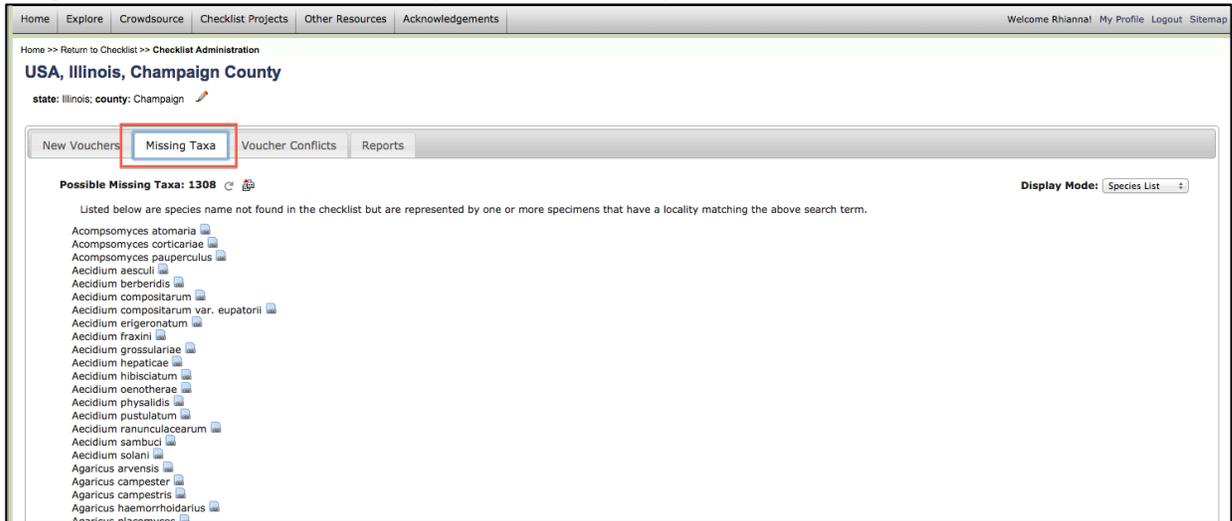
   b. Changing the "Display Mode" from "Species List" to "Batch Linking" will allow you to easily add as many or as few of these vouchered specimens to your checklist. Check the box next to the record, then press "Add Taxa and Vouchers" at the bottom.
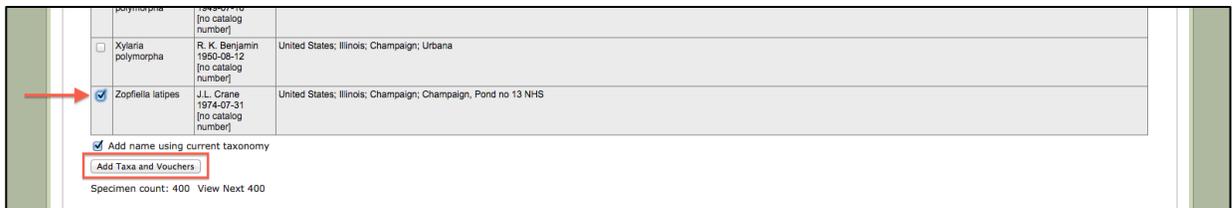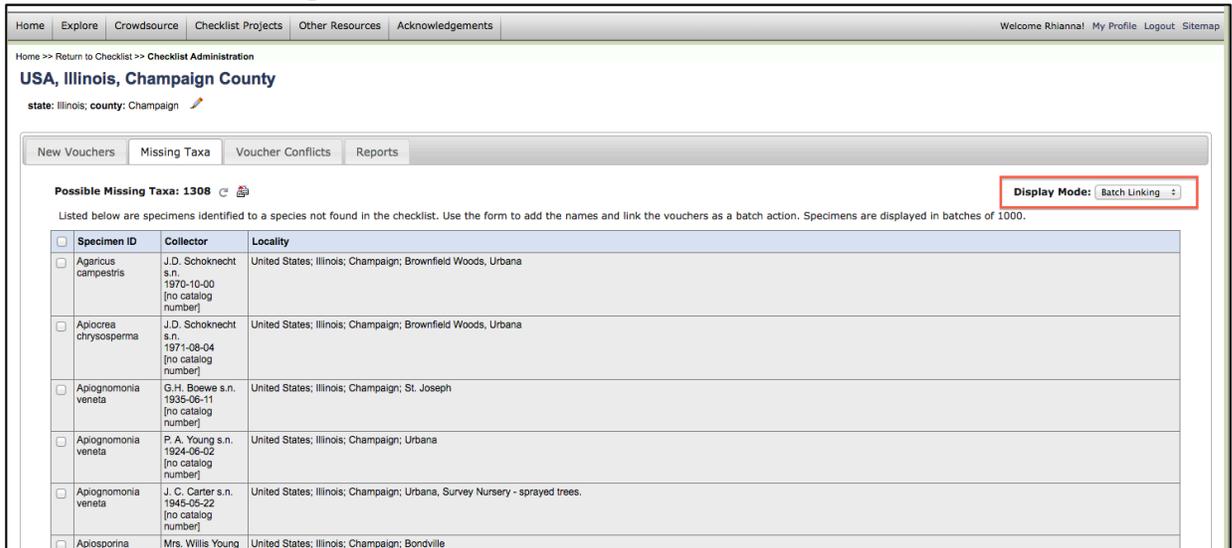
4. Once you have added species to the checklist, you can also add notes to those species. By selecting the pencil icon with "SPP," more pencil icons will pop up next to each species name. Press those to bring up a dialogue box in which you can type in notes that will appear next to the vouchered specimen.

5. 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].