



Transcription Rules for Crowdsourcing

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Before we begin, please review the [“What’s in a label”](#) document!

We will be working in Short Form instead of Long Form, which means, please **REFRAIN** from on this Long Form.

Read the rules carefully and pay close attention to the bullet points.

There should be **NO** punctuation marks at the end of any field *aside* from **Number** when appropriately using **s.n.** and **Verbatim Date** when appropriately using **s.d.**

IF any field is already filled in, please **REFRAIN** from making changes. You may double-check the data for correctness, but do **NOT** delete. If you find the data does not match what is on the label, report the change in **Notes** field and set **Status Auto-Set** field to **Expert Required** (Status Auto-Set will be discussed towards the end of this document).

Table of Contents

- ❖ [Other Cat. #s](#)
- ❖ [Collector](#)
- ❖ [Collection Number](#)
- ❖ [Collection Date](#)
- ❖ [Associated Collectors](#)
- ❖ [Verbatim Date](#)
- ❖ [Exsiccati Title](#)
 - [Exsiccati Number](#)
- ❖ [Scientific Name](#)
- ❖ [Country](#)
- ❖ [State/Province](#)
- ❖ [County](#)
- ❖ [Locality](#)
- ❖ [Latitude and Longitude \(decimal format\)](#)
- ❖ [Verbatim Coordinates](#)
- ❖ [Verbatim Elevation](#)
- ❖ [Habitat](#)
- ❖ [Substrate](#)
- ❖ [Description](#)
- ❖ [Notes](#)
- ❖ [Cultivated Checkbox](#)

Transcription Rules for Crowdsourcing

❖ [Status Auto-Set](#)

The Short Form contains:

Other Cat. #s [?]

Other Cat. #s: Any other identifier for a specimen record that is not the catalog number. This field is typically used to store the old catalog number for collections that are in the process of switching from one cataloging system to another.

- Looking back at "[What's in a label](#)", the object/accession number will be entered in this field
- IF there is NO object/accession number, please leave blank.

Collector [?]

Collector: The primary individual that collected the specimen or made the observation.

- To distinguish a collector, look for Collected by, Coll. by, Legit, or Leg.
 - **French:** "collected by" translates to "recueilli par" or "rec. par".
 - **German:** "collected by" translates to "gesammelt von".
 - **Italian:** "collected by" translates to "raccolto da".
 - **NOTE:** "Sent by" does not necessarily mean "collected by" unless it is coupled with "Sent and collected by".
- Please enter the collector with the first and/or middle names abbreviated followed by the last name, as depicted in the image above. And remember to place a space between first and middle name as well as last name!
 - If you have questions about the collector or how to appropriately write out his/her name, please visit: https://kiki.huh.harvard.edu/databases/botanist_index.html
 - Use the standard label name if using the Harvard botanist database.
 - If the collector's name did not come up you may spell out the full name.
- In case there is *more than one* collector on the specimen's label, enter the **first collector** listed in the group.
- IF there is NO collector(s), enter **[collector unknown]**

Number [?]

Number: The collection number assigned to the specimen *by the collector*.

- A collection number may contain special characters or letters, please enter as shown on label.

Transcription Rules for Crowdsourcing

- If there is no collection number, enter **s.n.**

Date ?

Date: The date the specimen was collected. NOT to be confused with the date identified/determined. Date should be entered as an ISO-8601 numeric format (YYYY-MM-DD).

- **IF** the collection date is reported as a date range, enter the earliest collection date and enter the date range in **Verbatim Date** field.
 - **Example:** Dec. 1943 - 22 June 1944
Date: 1943-12-00
Verbatim Date: Dec. 1943 - 22 June 1944
- Unknown months and days can be entered as "00". For example, a collection with a date of "March 1956" can be entered as "1956-03-00".
- Sometimes a date may have the month appear as a roman numeral, eg. XI 1951 (Nov 1951).
- A date can also be formatted on the label as the year separated in half by a fraction, eg. 18 $\frac{24}{11}$ 59 translates to 24 Nov 1859.
- **IF** there is **NO** collection date on the label, please enter **s.d.** in **Verbatim Date** field.

Associated Collectors ?

Associated Collectors: Other collectors that were present at the time of collection.

- Enter name(s) of collector(s) that come **after the first collector** listed on the label following the same format in the Collector field.
- If there is more than one collector listed after the first collector, please indicate this using a pipe.
 - **Example:** A. W. Evans, C. C. Haynes, A. Lorenz, W. J. Robinson
Collector: A. W. Evans
Associated collectors: C. C. Haynes|A. Lorenz|W. J. Robinson
 - Keyboard shortcut for pipe: The pipe is on the same key as the backslash key. It is located above the Enter key (Return key) and below the Backspace key. Pressing and holding down the Shift key while pressing the pipe key creates a pipe.
 - **IF** there are **NO** associated collectors, please leave blank

Verbatim Date ?

Verbatim Date: Used to record date exactly as entered on label. Particularly useful for non-standard date formats or date ranges.

- **Example:** Spring 1901, March-April 1952, late Sept. 1909

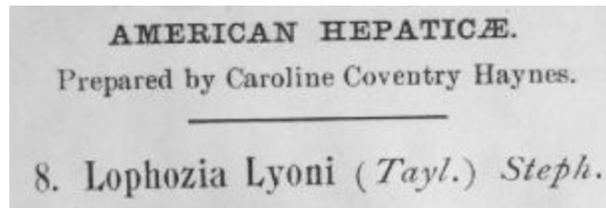
Transcription Rules for Crowdsourcing

- To reiterate, **IF** there is **NO** collection date on the label, please enter **s.d.**

Exsiccati Title	Number
<input type="text"/>	<input type="text"/>

Exsiccati Title: Name of a publication for a numbered set of dried herbarium specimens.

- Number:** An exsiccati number assigned to a set of dried specimens published in a publication. **NOT** to be confused with the collection number. Exsiccatu usually never have collection numbers.
 - To figure out if you are databasing an exsiccati specimen, you will see prepared by, distributed by, published by, and/or a citation of a journal on the label.
 - French:** “published by” translates to “publié par” or “pub. par”.



- Example:**
 - Exsiccati Title:** American Hepaticae
 - Number:** 8

NOTE: If you are having trouble determining the exsiccati title, please report in **Notes** field and set **Status Auto-Set** to Expert Required.

Scientific Name [?]

Scientific Name: The Latin name of the specimen **without the author**. Could be anything from kingdom down to subspecies or variety, depending on the level of the identification. To aid data entry, a drop down menu will appear as one types, though names outside of the list can still be entered.

- Example:** Pinaceae (family), *Pinus* (genus), *Pinus edulis* (genus and species), *Pinus edulis* var. *fallax* (genus, species, rank, and infraspecific species)
 - Note: Rank can be variety (var.) or subspecies (subsp.).
- WATCH OUT** for annotation labels or slips of paper that update the scientific name of the specimen as discussed in “[What’s in a label](#)”.
- IF** you see an annotation label, **ENTER** the scientific name given on that label.
- IF** there is more than one annotation label, **ENTER** the **most recent updated annotation**.

If you do have questions about the spelling of scientific names, please visit www.tropicos.org.

If you would like to learn more about biological classifications, please visit:

<https://www.sciencelearn.org.nz/resources/1438-classification-system>



Transcription Rules for Crowdsourcing

Important before moving forward: If you ever have questions about the locality, you may do a simple internet search, search for gazetteers of the country or state, or click this document, [Resources for Locality Information](#). If you suspect that you may have a misspelling or name change for a place name, please report in **Notes** field and set **Status Auto-Set** as **Expert Required**.

Country ?

Country: The name of the country in which the specimen was collected. To aid data entry, a drop down menu will appear as one *types*, though names outside of the list can still be entered.

- **REMEMBER** to be a country, it has to be recognized by all members of the United Nations (UN).
 - **Example:** Taiwan considers itself a country, **BUT** it is **NOT** recognized by all members of the UN so Taiwan is still a province of China.
- Please visit: https://en.wikipedia.org/wiki/List_of_administrative_divisions_by_country, and look under the column, Country.
- **IF** there is **NO** country **AND** the locality does **NOT** denote any other information to give clue to the country, please enter **[country unknown]**

State/Province ?

State/Province: The name of the state or province in which the specimen was collected. As one *types*, a selection list will appear for the given country.

- For specimens collected outside of the United States, enter the next geographic region below the country.
- Please visit: https://en.wikipedia.org/wiki/List_of_administrative_divisions_by_country, and look under the column, First-level.
- Pay attention to this abbreviation prov., which oftentimes stands for province.
- **IF** there is **NO** state **AND** the locality does **NOT** denote any other information to give clue to the state, please leave blank.

County ?

County: The name of the county in which the specimen was collected. Choose one from the drop down menu.

- For specimens collected outside of the United States, enter the next geographic region below state/province.
- Please visit: https://en.wikipedia.org/wiki/List_of_administrative_divisions_by_country, and look under the column, Second-level.

Transcription Rules for Crowdsourcing

- **IF** there is **NO** county **AND** the locality does **NOT** denote any other information to give clue to the county, please leave blank.

Locality ?

Locality: The detailed location in which the specimen was collected. This does NOT include country, state/province, and county.

Rules for locality information

- Usually, you will want to organize your precise detailed locality from the most general location to the most specific location.
 - **Example:** *on Old Faithful Rd., Yellowstone Natl. Pk., Wyoming, Old Faithful Visitor and Education Center*
 - Country:** United States
 - State/Province:** Wyoming
 - Locality:** Yellowstone National Park, on Old Faithful Road, Old Faithful Visitor and Education Center
- **Always** capitalize proper nouns this *includes* place names (names of cities/towns, national parks, etc).
- **Always** capitalize the beginning of a locality sentence.
- Abbreviations **HAVE** to be spelled out
 - Ill. or IL → Illinois (All state abbreviations have to be spelled out)
 - CA could be California or Canada
 - Alta means Alberta. NOT to be confused with altitude
 - B.C. means British Columbia. NOT to be confused with BC (before christ)
 - G.S.M.N.P. → Great Smoky Mountains National Park
 - Mt., mt., mt, mts., mt. → Mount or Mountain or Montana
 - Mount is used BEFORE the place name.
 - Example: Mt. Rushmore → Mount Rushmore
 - Mountain is used AFTER the place name.
 - Example: Rocky Mts. → Rocky Mountains
 - Use context clues to decide if MT means Montana or mount/mountains
 - Pk. or pk → park or peak
 - Use context clues to decide if pk means park or peak
 - Hwy. or Hwy → Highway

Transcription Rules for Crowdsourcing

- Nat., Natl. or Natl → National
- For. → Forest
- R. → River
- Cr. → creek
- RR → Railroad
- Res. or Res → Reserve or Reservation (*Use context clues*)
- mi. or mi → miles
- m. or m → meters (*Use context clues to decide between miles or meters*)
- nr. or nr → near
- c. → ca.
- vic. → vicinity
- N, S, E, W → north, south, east, west (**capitalize only in beginning sentences**)
- **EXCEPTIONS TO ABBREVIATION RULE:**
 - kilometer is abbreviated to km
 - centimeters is abbreviated to cm
 - **IF** “about” is abbreviated to ca., leave alone
 - Any cardinal directions that are coupled together
 - Example: Southwest → SW (**keep capitalized**)
 - Example: NorthWestNorth → NWN (**keep capitalized**)
- For any fractions related to distance in locality need to be transformed into decimal form. Round to TWO decimal places.
 - $\frac{5}{8} \rightarrow 0.63$
 - $1\frac{1}{2} \rightarrow 1.5$
 - $4\frac{2}{3} \rightarrow 4.67$
- Do **NOT** repeat country, state/province, and county in a locality sentence, in other words **AVOID REDUNDANCY.**
 - **Example:** *By the shores of Lake Michigan, Cook, IL, United States.*
Country: United States
State/Province: Illinois
County: Cook
Locality: By the shores of Lake Michigan *Remember no punctuation marks at the end of each field*
- **EXCEPTION TO REDUNDANCY RULE**
- **IF** the country, state/province, or county is being used to distinguish borderlines, please include in a locality sentence.
 - **Example:** *In Great Smoky Mountains National Park close to the border of Tennessee and N.C., TN, USA*
Country: United States
State/Province: Tennessee

Transcription Rules for Crowdsourcing

Locality: In Great Smoky Mountains National Park close to the border of Tennessee and North Carolina

- **PAY CLOSE** attention to municipalities, a town or city will need to be entered in the **Locality** field as:
 - Name of municipality|Locality detailed sentence
 - **Example:** *Picnic area, DeSoto National Memorial Park, Tampa Bay, FL, USA*
Country: United States
State/Province: Florida
Locality: Tampa Bay|DeSoto National Memorial Park, picnic area
- **PAY CLOSE** attention to islands or island groupings, each one needs to be entered in the **Locality** field as:
 - Name of Islands|Name of Island|Locality detailed sentence
 - **Example:** *San Juan Islands, North of Orcas landing, Orcas Island, Washington*
Country: United States
State/Province: Washington
Locality: San Juan Islands|Orcas Island|North of Orcas Landing
- **IF** the locality on the label does **NOT** include the name of island grouping but does include name of island, **ONLY** enter island name and the locality detailed sentence.
 - **Example:** *Washington, North of Orcas Landing, Orcas Island*
Country: United States
State/Province: Washington
Locality: Orcas Island|North of Orcas Landing
- **IF** the locality on the label does **NOT** include the island name but does include name of island grouping, **ONLY** enter name of island grouping and the locality detailed sentence.
 - **Example:** *San Juan Island, Washington, North of Orcas Landing*
Country: United States
State/Province: Washington
Locality: San Juan Islands|North of Orcas Landing

If you have questions on islands and island groupings, review [Resources for Locality Information](#).

- **IF** the locality information on the label includes island, island grouping, and municipality, enter the information as follows:
 - Name of Islands|Name of Island|Name of municipality|Locality detailed sentence
 - **Example:** *HERMANESS NATIONAL NATURE RES., Shetland Islands, Lerwick, Shetland, Scotland.*
Country: Scotland
Locality: Shetland Islands|Shetland|Lerwick|Hermaness National Nature Reserve



Transcription Rules for Crowdsourcing

- **IF** the locality on the label does **NOT** include the name of island grouping but does include name of island and municipality, **ONLY** enter island name, municipality, and the locality detailed sentence.
 - Example: *Tahiti, French Polynesia, south of Fautaua Valley, Pape’ete.*
Country: French Polynesia
Locality: Tahiti|Pape’ete|South of Fautaua Valley
- **IF** the locality on the label does **NOT** include the island name but does include name of island grouping and municipality, **ONLY** enter name of island grouping, municipality, and the locality detailed sentence.
 - Example: *Teanavai Camping Site, Society Islands, Papeari, French Polynesia.*
Country: French Polynesia
Locality: Society Islands|Papeari|Teanavai Camping Site
- **IF** there is **NO** locality information aside from country, state/province, county, municipality, island, and/or island grouping, please enter **[precise locality unknown]**
 - Example 1: *India*
Country: India
Locality: [precise locality unknown]
 - Example 2: *USA, DuPage Co., Ill.*
Country: United States
States/Province: Illinois
County: DuPage
Locality: [precise locality unknown]
 - Example 3: *Santa Fe, Argentina, Departamento de Rosario, Zavalla.*
Country: Argentina
States/Province: Santa Fe
County: Rosario
Locality: Zavalla|[precise locality unknown]
 - Example 4: *Alaska, Aleutians, Adak*
Country: United States
State/Province: Alaska
Locality: Aleutian Islands|Adak Island|[precise locality unknown]
- **This rule still applies when there is absolutely NO country, state/province, county, municipality, island, and/or island grouping.**

Latitude	Longitude	Uncertainty ?
<input type="text"/>	<input type="text"/>	<input type="text"/>

Latitude and Longitude (decimal format): The angular distance north or south of equator (**latitude**) and the angular distance east or west of meridian (**longitude**) in decimal degrees.

- Do NOT fill in this field UNLESS the coordinates are in decimal form.

Transcription Rules for Crowdsourcing

tude Longitude Uncertainty ? **F** << Verbatim Coordinates ?
 [] [] [] [] << []
 vation in Meters ? Verbatim Elevation ? Depth in Meters ?
 [] - [] << [] [] - []
 batim Depth ?
 []

Lat: [] ° [] ' [] " N ⇅
 Long: [] ° [] ' [] " W ⇅
 [Insert Lat/Long Values]

Zone: []
 East: []
 North: []
 Hemisphere: North ⇅
 [Insert UTM Values]

Verbatim Coordinates: If the coordinates recorded on the specimen label are in a format other than decimal degrees, enter them here.

- **IF** your specimen label contains coordinates NOT in decimal form, please click on the **F** button, where two options of coordinate formats will appear; Degree, Minute, Seconds (DMS) and Universal Transverse Mercator (UTM).
- Once you have selected the coordinate format that best fits the coordinates shown on the label, please remember to click **Insert...Values**.

NOTE: The most commonly seen coordinates on labels are DMS and Township, Range, Section (TRS).

- If you happen to have TRS values, directly enter in **Verbatim Coordinates** as TRS: T[Number and Cardinal Direction] R[Number and Cardinal Direction] sec [Number and Cardinal Direction]

• **Example:** Sect. 93, R 4W, T 1S

Verbatim Coordinates: TRS: T1S R4W sec 93

Elevation in Meters ? Verbatim Elevation ?
 [] - [] << []

Verbatim Elevation: The verbatim elevation at which the specimen was collected.

- When the **Elevation in Meters** field is left blank, the value will automatically be converted to meters. Click the (<<) symbol to replace the previously entered meters

Transcription Rules for Crowdsourcing

values. **Example:** 4500ft, 4500 feet, ca 4500', ca 2000m, 4500' +-300', 1500 m.a.s.l. (meters above sea level), 2300 m.s.m.

Habitat ?

Habitat: The description of the habitat in which the specimen was collected.

- **Always** capitalize the beginning of a sentence even if it's one word
- **Example:** Wet areas along a small stream in chaparral
- Keywords to look for to distinguish habitat: in

Substrate ?

Substrate: The substrate on which the specimen was collected. Mostly used for lichen and bryophyte specimens.

- **Always** capitalize the beginning of a sentence even if it's one word
- **Example:** On basalt, trunk of oak
- Keywords to look for to distinguish substrate: on

Description ?

Description: A physical description of the specimen at the time of collection. This often includes information that can be lost or difficult to observe after the collection and preservation process.

- **Always** capitalize the beginning of a sentence even if it's one word
- **Example:** Shrub 3 m tall, corolla yellow

Notes (Occurrence Remarks) ?

Notes: Any additional notes regarding the specimen.

- **You may use this field to report any irregularities or questions you have about the label or image.**
 - When reporting questions or concerns, please remember to set **Status Auto-Set** to **Expert Required**.

Cultivated/Captive

Cultivated Checkbox: Check when the organism was established with the aid of humans and would not be able to exist on their own (eg. greenhouse). This true/false field enables the ability to filter non-native or naturalized species.

Status Auto-Set: Keeps track of records that need further data processing, require attention from others, or it has been reviewed.

✓ No Set Status

Unprocessed

Unprocessed/NLP

Stage 1

Stage 2

Stage 3

Pending Review-nfn



Fueling a journey
of discovery

Transcription Rules for Crowdsourcing

- **IF** you have **NO** questions or concerns with the record that you updated, please click on the drop-down menu to select **Pending Review**. *Needs to be done with each record completed!*
- **IF** you **DO** have questions about the record, click on the drop-down list to select **Expert Required** and leave the question in **Notes** field such as *[illegible]*, *[annotation is covered]*.

Once finished, always save your edits by clicking

Save Edits