

SOP: INHS-IC Task Guides

Tommy McElrath
Illinois Natural History Survey (INHS)
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Preamble

This standard operating procedure document (SOP) describes the different SOPs that we have developed to do different tasks in the insect collection database “INHS Insect Collection”.

TaxonWorks:

<https://sfg.taxonworks.org/>

SOP links:

a. ALL SOPs:

- https://drive.google.com/open?id=1POvfrHdalH-z6selu_FY-P8QbpsSCcsw
- i. [Working in the INHS Insect Collection](#)
- ii. [Comprehensive Digitization](#)
- iii. [Creating New Images of Vial-Preserved Insects for Uploading into TaxonWorks](#)
- iv. [New Image Task](#)
- v. [Browse Nomenclature/New Taxon Name](#)
- vi. [New Loan](#)
- vii. [Collection object image breakdown TODO list \(aka Transcribe Depiction\)](#)
 - 1. [Fixing a “broken” depiction](#)
- viii. [Grid digitizer](#)
- ix. [Staging Slides for Scanning](#)
- x. [SOP: Fixing Duplicate Slides](#)
- xi. [DWCA Upload](#)
- xii. [SOP: INHS Insect Collection Best Practices & History](#)
- xiii. [New Collecting Event \(and associated specimens\)](#)
- xiv. [SOP: Vouchering Specimens with the INHS Insect Collection](#)
- xv. [INHS Data Dump to GBIF SOP](#)

Guidelines:

1. Different tasks can do the same thing in different ways. TaxonWorks has lots of options for doing various things in lots of places. If you find a quicker or better way of doing something, good!
2. Use the “Favorites” tab to customize the tasks or data tabs you use within that project on a regular basis.

3. This SOP is not a “procedure” but rather an overview of different tasks and what we use them for.

Specimen (and specimen image)-focused tasks:

- 1) [Comprehensive Digitization](#):
 - a) Digitize a specimen from start to finish, annotate everything from catalog numbers to collecting event information to images.
 - b) Associated task: Browse Collecting Object (allows you to see a timeline based history of that specimen).
- 2) Staged Imaging Workflow:
 1. [Creating New Images of Vial-Preserved Insects for Uploading into TaxonWorks](#)
 2. [New Image Task](#)
 3. [Collection object image breakdown TODO list \(aka Transcribe Depiction\)](#)
 4. There are temp. steps for further breaking down images/parsing them, but these are not “finalized”
- 3) Bulk edit of specimens:
 - a) Collection Object Match:
 - i) Allows you to enter multiple specimens, then bulk assign determinations, collecting events, add to loans, tags.
- 4) Filter collection objects:
 - a) Allows you to query the database by multiple parameters.
- 5) [Grid digitizer](#)
 - a) Allows for upload of specimens imaged in grids (e.g. scans of slides, vial racks, or drawers), where new collection objects are created for different parts of the image.
- 6) DWCA Upload
 - a) Allows for upload of numerous collection objects via DWC archive.

Loans:

- 1) [New Loan](#)
 - a) Basically all loan stuff, including assigning new determinations, can be done through this task.
- 2) Adding objects to loan:
 - a) Can be done through “Collection object match”
 - b) Enter multiple specimens, then add to loans

Nomenclature:

- 1) [Browse Nomenclature/New Taxon Name](#)
 - a) Manage, edit, add new Taxon names
 - b) Note this is DIFFERENT from OTUs, which stand between collection objects and collection objects
- 2) New type specimen

- a) Allows for detailed creation of new type specimens, allowing for more annotation than is present in Comprehensive.
- 3) Nomenclature states
 - a) Get counts of names at different ranks

Various:

- 1) Browse Annotations
 - a) View and filter things that have annotations (e.g. tags). Not limited to collection objects
- 2) Manage controlled vocabulary
 - a) Manage tags, data attributes, biocuration groups, and other kinds of controlled vocabulary
- 3) Collection object work report
 - a) Allows admins to view how much time is being spent in the database on collection objects by various users
- 4)