Introduction/Getting set up

Recommendations

1. We recommend using a desktop or laptop computer that has a full-size screen and keyboard. Tablets and phones will be very limited in the viewable screen area and auto-correct can introduce unwanted text errors. You will also need an internet connection.
2. You don't need a lot of time to be productive in transcribing multiple specimens on this project. Once you have done a few, it only takes a few minutes to complete each specimen. A few minutes here and there add up to volunteer time and to the number of specimens transcribed in order to complete a project!

Register/Login

1. Navigate to the Notes from Nature website at https://www.notesfromnature.org/
2. If using for the first time, we suggest that you register by creating an account to track your work and have the capability to post on discussion boards, if necessary. In the top right corner of website, click **Login**.
   a. Then at the bottom near the various "Sign In" buttons is the **Sign up** link, click on that and fill out your desired username, current email address, and desired password.
   b. Read and accept the Privacy Policy and select the appropriate boxes for how much email Notes from Nature can send you.
   c. Once complete, click the large blue box on the right side of screen **Sign up**.
3. If you are a returning user and have already registered, click **Login** at the top right corner of website.
   a. Type in your username or email address and your password.
   b. Once complete, click the large blue box on the right side of screen **Sign in**.
4. Once you are registered and/or logged in, you will return to the home screen.
   NOTE: You can view how many specimens you have done at any time by clicking on your username in the upper right corner of the screen. Then select Profile in the drop-down box. Click on Your Stats in the center of the screen. This will display an icon with a number in the upper right corner. The number reflects how many specimens you have transcribed.

Navigating to the *Plants of Virginia* transcription project

1. On the https://www.notesfromnature.org/ home screen, select the leaf icon for **Plants**.
2. Select the project associated with Virginia. Currently, the project is called "Pollinator Plants of Virginia" but this will change over time. The name of the project should always have "Virginia" in it and this is the one that should be selected.
   NOTE: Under each project's title, the percent complete is displayed. Once a project has been completed, another will become available.
3. Once you have entered the project, the transcription workspace is viewable and the tutorial window is displayed on top of the specimen to be transcribed.
   NOTE: We recommend reviewing the tutorial initially and again as needed. Be sure to scroll down to read all the content on the tutorial. You can always access the tutorial anytime by clicking **Show the project tutorial** to the right of the specimen window.

Transcription

Components of the herbarium sheet

1. All herbarium images are formatted the same way. They all have a plant specimen, a label, and an accession number on the herbarium sheet. For photographic standards, the image also contains a scale bar, the herbarium logo, and a color square, usually at the bottom of the photo.
   a. Herbarium voucher specimen – the voucher specimen is a single plant that has been collected by an individual at a specific location on a particular day; this documents the location of the species and provides an official record as to the distribution and location of the collected species.
   b. Herbarium label – the label is usually found in the bottom right corner of the herbarium sheet and contains all the pertinent information about the collection of the plant that was made; the label at a minimum usually includes (from top to bottom):
      i. The name of the herbarium in which the specimen was deposited
      ii. The state from which the specimen was collected
      iii. The county from which the specimen was collected
      iv. The scientific name written as: *Genus species* **Author**, where "author" is the person who described the species; may also include the family name for the genus
      v. The physical description of the location and habitat, may also include GPS coordinates
      vi. Collector(s) and the collector's unique identification number for the specimen
      vii. Date specimen was collected
2. Sometimes there is an annotation label on the herbarium sheet. This label is smaller than the herbarium label and is usually directly above the original label. The annotation label contains a change made to the original identification of the species or some other change of information after the original label was made. There should be a date on the annotation label that is more current than the herbarium label collection date. If there is an annotation label, the information contained on it supersedes the corresponding information on the herbarium label.
3. Accession number – this number is a sticker affixed to the herbarium sheet and is a unique identifier of the record within the herbarium to which it belongs

Transcription Procedures

1. Once you are logged in, have navigated to the project on the Notes from Nature website, and see an image of a specimen, you are ready to start transcribing. The project tutorial will be displayed over a grayed-out specimen image in the background. Close the tutorial after reading it.
   NOTE: We recommend reviewing the tutorial initially and again as needed. Be sure to scroll down to read all the content on the tutorial. You can always access the tutorial anytime buy clicking **Show the project tutorial** to the right of the specimen window.
2. The first data to be entered is for **County**. Read the herbarium label to determine what county the plant was collected in and enter that into the **County** text box on the right side of the screen. The text box will auto-populate a drop-down box as you start to type text that matches a known county in Virginia. You can then select the county from the drop-down box to auto-fill

the rest of the information for this field. Once the county has been entered, click the large green **NEXT** button to the lower right of the text box.

NOTE: You can pan and zoom into the label of the herbarium sheet so that it is immediately next to the text boxes that you will be entering data into. This makes it easier to eliminate the need for constant scrolling back and forth. Click on the 4-way directional arrow button at the top of the vertical navigation bar immediately to the right of the specimen image. It will turn blue when selected. This allows you to pan around the image by clicking and dragging the image so that the label comes towards the top of the screen and is in line with the text boxes to the right. Then you can click the **+** button in the vertical navigation bar to zoom in. Refine the desired placement of the image by zooming and panning as needed.

3. The next data to be entered is the **Location** and **Habitat & Description** fields. Read the label information and sort out in your mind which part is location and which part is habitat description. The wording and phrases for each section may be together or separate from each other. Only location information goes into the **Location** text box and only Habitat and other Descriptions go into the **Habitat & Description** text box. Parse these out in your mind first and then type verbatim the parts that go in the correct box. If the wording is not adjacent, then separate statements with a period. Location data is any data besides County, State, or Country that will allow someone to navigate back to the population. After entering both **Location** and **Habitat & Description** fields, click on the large green **NEXT** button to the lower right of the text boxes.

    a. Transcribe the text as you see it. Abbreviations should be kept as abbreviations.

    b. Sometimes a general location is included at the top of the label like a title (i.e. The Flora of Lake Moomaw) but may not mention Lake Moomaw in the location section of the label.   Include Lake Moomaw in the **Location** field with the other location data.

NOTE: If you have any questions on this, click on the **Need help with this task?** button for more information. This option is available for all data entry fields. We recommend reading these for each field initially and again as needed.

4. The **Collected By** field is the next to be filled out. Enter the name or names of the collector(s) in this field. If there are multiple collectors, then separate the collector names with a comma. Many times collector names are abbreviated with initials. Transcribe verbatim what you see except to enter a space between an initial and name when there should be one.

5. Enter the **Collection Number** as it is on the label, this is an alphanumeric code. Do not enter "No." or "#" with the number. If there is no number, leave it blank. Sometimes this is denoted as "s.n." and that should be entered if that is the case.

6. Then enter the **Date** (of collection) by individually entering the month, day, and year into the separate drop-down boxes.

NOTE: You can shortcut to the month, day, or year by starting to type the number (of the month, day or year) into the text box. Then you can select the appropriate entry.

7. Once complete, click on the **DONE** button or the **DONE & TALK** button. The **DONE** button should be used when you are done and there are no issues that were uncovered during the transcription process. Once clicked, a new specimen will be shown for transcription. The **DONE & TALK** button should be used if you discovered a problem with the label data and it needs to be reviewed. Other comments are welcome, too. You will need to describe the problem encountered on the talk screen by entering "#error" and a description of the problem.

<u>Metadata</u>

1. There is no need to enter the family or scientific name during the transcription process. This information has already been entered when the image was taken of the specimen.
2. You can view the scientific name associated with the specimen:
    a. When viewing a specimen image during the transcription process, scroll down to the bottom of the image window.
    b. Click on the "i" contained within a circle icon at the bottom right of the window. This will open a new window with the image's associated metadata. The scientific name will be listed here and also includes a reference link back to the herbarium database and a imageURL link back to where the original image is stored. It is recommended to right-click on this links and open in a new window or else you will lose the specimen that you are working on.
3. You can mark any specimen as a favorite or "collect" it for easy reference later. You will need to be logged in to do this so it saves it to your profile.
    a. To mark a specimen as a favorite, click on the heart icon.
    b. To collect a specimen, click on the icon of four small lines. This will open a new window to name or select a collection. This feature is useful, for example, if you want to keep track of all species you transcribe from a certain location or ones of a particular genus.

<u>Useful links with additional information for transcription</u>

1. The Notes from Nature FAQ. It includes common scenarios encountered when transcribing labels that may not be included in the project tutorial or the **Need help with this task?** button. The FAQ also includes links to useful sites to help determine some place names. https://blog.notesfromnature.org/2018/01/26/updated-faq-and-useful-tools-herbarium-interface-version-3/

2. Notes from Nature Talk (Discussion Boards). There are discussion boards for various topics for questions you may have that are not answered in the project tutorials, help, or FAQ. https://www.zooniverse.org/projects/zooniverse/notes-from-nature/talk