


Uploading Records and Images.

To utilize the Crowdsourcing Module, skeletal specimen records and images must be available for the target collection.

1. Uploading skeletal data

- a) Visit the Administration Control Panel for the target collection¹.
- b) Click the "Import/Update Specimen Records" link.
- c) Create a new Direct Upload profile by clicking the green x (+).
- d) Visit this page for more details about the upload process: http://symbiota.org/tiki/tiki-index.php?page=Specimen+Upload+Procedure#Specimen_Upload_Procedure_2.

2. Uploading images

- a) Visit the Administration Control Panel for target collection.
- b) Click the "Processing Toolbox" link.
- c) Click the "Image Loading" tab.
- d) Create a New Project by completing the form.
 - click the  icons (i) for more information about populating fields.
 - for **Image Target path** use: "/var/www/html/imglib/cnh/"
 - for **Image URL base** use: "/imglib/cnh/"
 - the source images will need to be on a publicly accessible web server. Talk to the CNH portal administrator if you need access to a web server.
- e) After the project is created, click the "Process Images" button to import images.


Using the Crowdsourcing Module.

1. Selecting records for Crowdsourcing

- a) Visit the Administration Control Panel for collection.
- b) Click the "Processing Toolbox" link.
- c) Click the "Crowdsourcing Module" tab.
- d) To make records available for editing:
 - click the "Add to Queue" link.
 - choose Criteria and click "Add to Queue".

2. Exposing records to public

- a) To share records with crowdsourcing volunteers:
 - provide link to CNH portal Crowdsourcing Score Board: <http://portal.neherbaria.org/portal/collections/specprocessor/crowdsource/central.php>
 - to access a table of records for a particular collection by clicking the value in the Open Records field within the Collection table²
 - within table click value in "Symbiota ID" field to transcribe label for a specimen

¹ To visit the Administration Control Panel for a collection, click the Collections link in the main Portal menu, click the collection name, and then in the window that opens, click the pencil icon (). To view the Administration Control Panel one must be logged in and have Administrator privileges for the target collection.

² It is possible to provide to volunteers a link directly to the next available unprocessed specimen in the queue. Contact the portal administrator for details about how to do this.

- alternatively, click Display Editor to view the first specimen in the queue

3. Reviewing submissions

- a) Visit the "Crowdsourcing Module" as described above.
- b) Click the "Review" link that is next to "Pending Approval".
- c) To Approve a record(s):
 - set points, add comments, and edit record as desired
 - click checkbox(s)
 - click "Submit Reviews" - this will set the status to "Closed (Reviewed)"