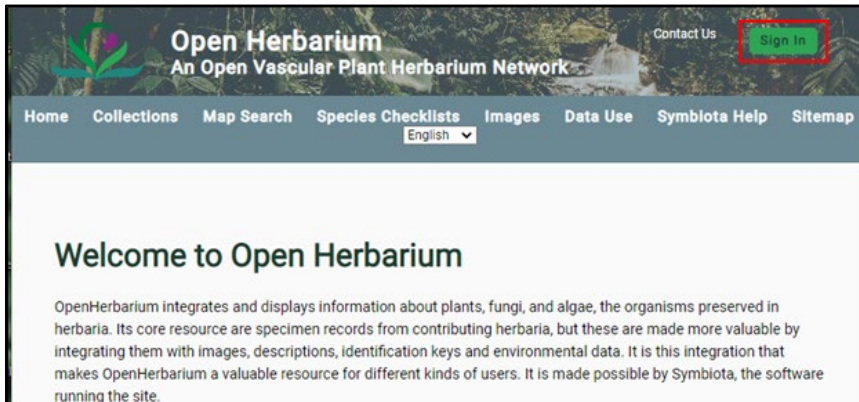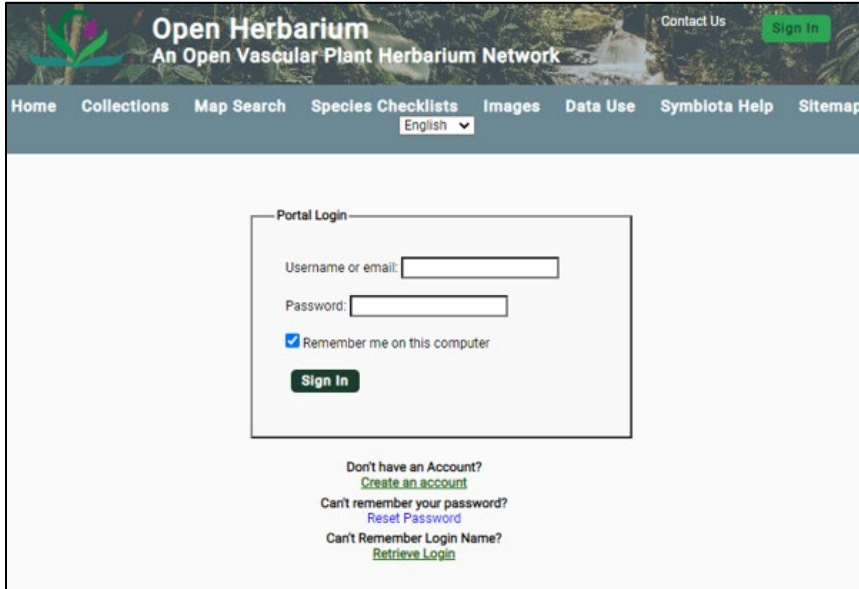# Leaf exercise: Entering field notes into OpenHerbarium.

1. Log into your account in OpenHerbarium, using the "Sign in" button.

2. Fill in the boxes with your information. If you have forgotten either your username or your password, click the appropriate link below the boxes to be sent an email with information on how to get into your account.

3. Once logged in, you will see OpenHerbarium's home page. Records in OpenHerbarium must be associated with a collection. To see the various collections that contribute records to OpenHerbarum, click the "Collections" tab on the navigation bar.
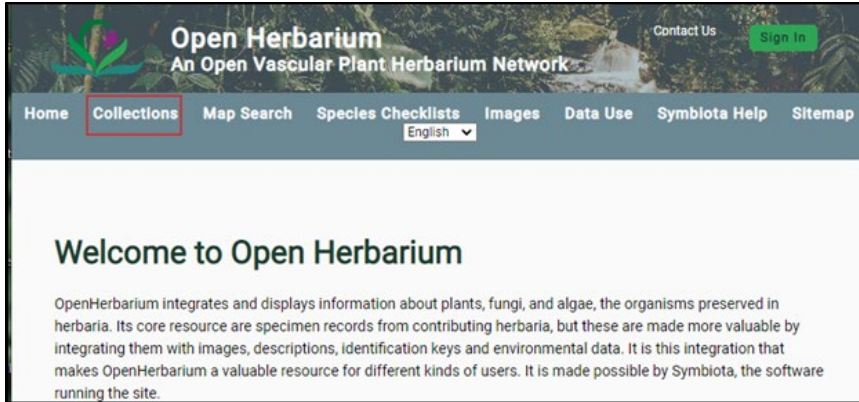
4. This will bring up the list of all contributing collections (see first picture below). If you are making collections as student, workshop participant, or explorer, you will enter data into the "Sandbox collection". This will allow you to create labels. You need to tell your instructor your username so he or she can give you the necessary permissions.
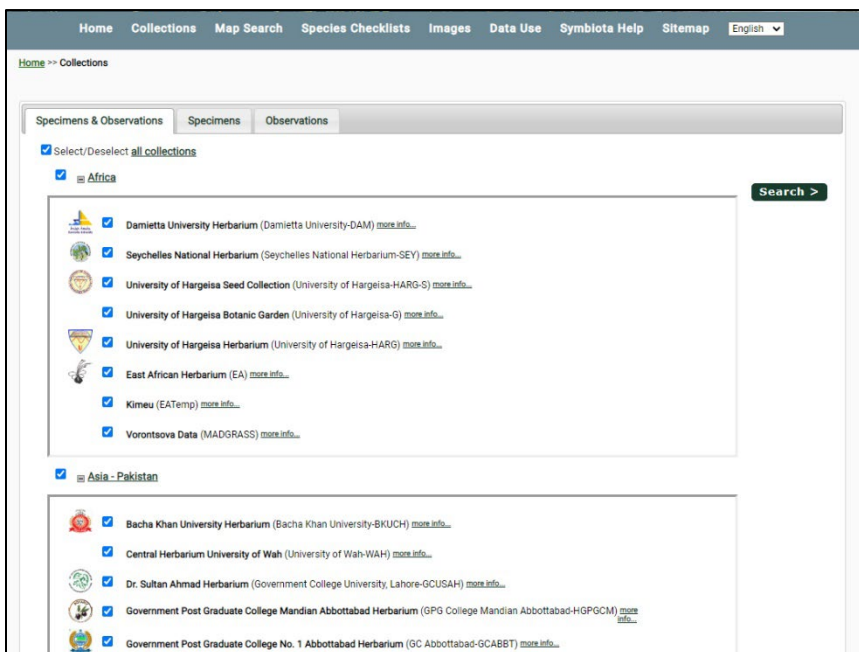

This figure shows the top of the list of collections contributing to OpenHerbarium. Scroll down to find the Sandbox collection. It is near the bottom of the page.

5. Once you have created an account and your instructor has given you the permissions you need, login to your account and click the "My Profile" button (see below).
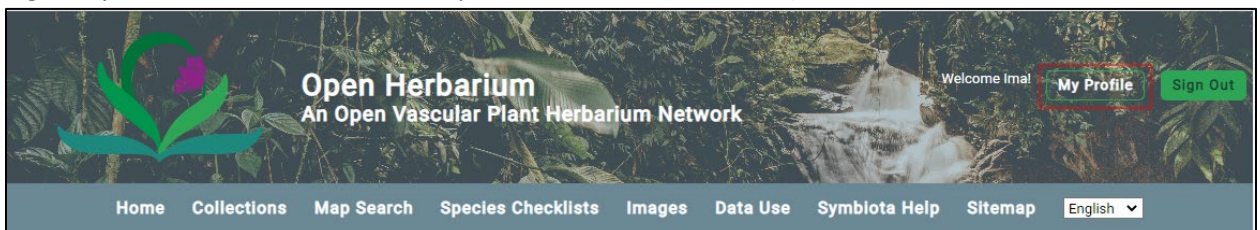
6. This will reveal the screen shown below. Click the "Occurrence Management" tab.
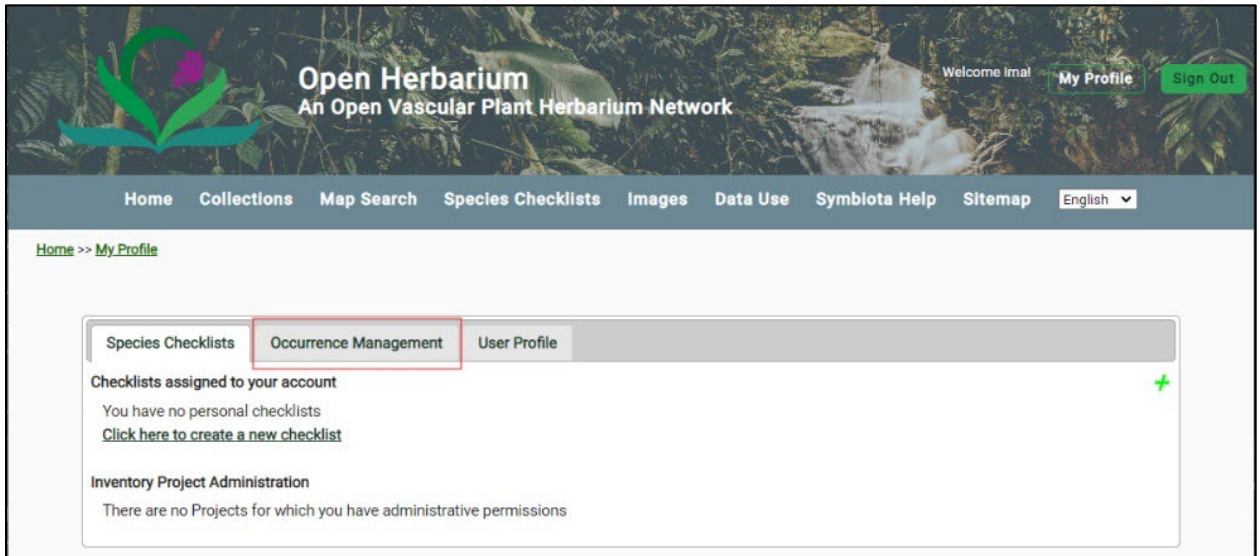
7. The screen below will be revealed. Click the "Sandbox" link. If you do not see it, try logging out, logging in again and clicking "My Profile" and then the "Occurrence Management" tab again. If you still do not see the "Sandbox" collection, check with your instructor.
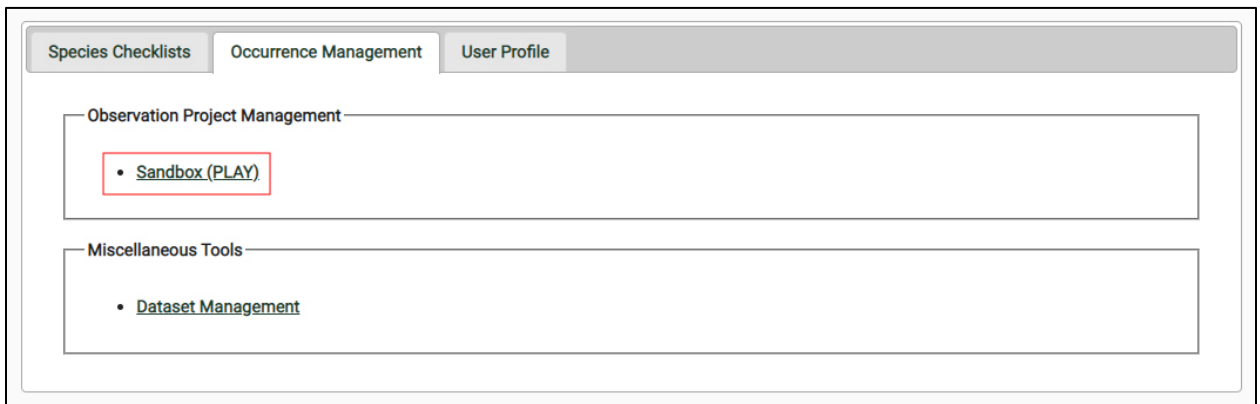
8. The next screen you see will show several options that are open to you (see below). Notice the pencil in the top right corner. When it is present, it means you have permission to use the tools or edit the form involved. For the Leaf exercise, you need to enter your collection data. For that, click "Add New Occurrence Record ".
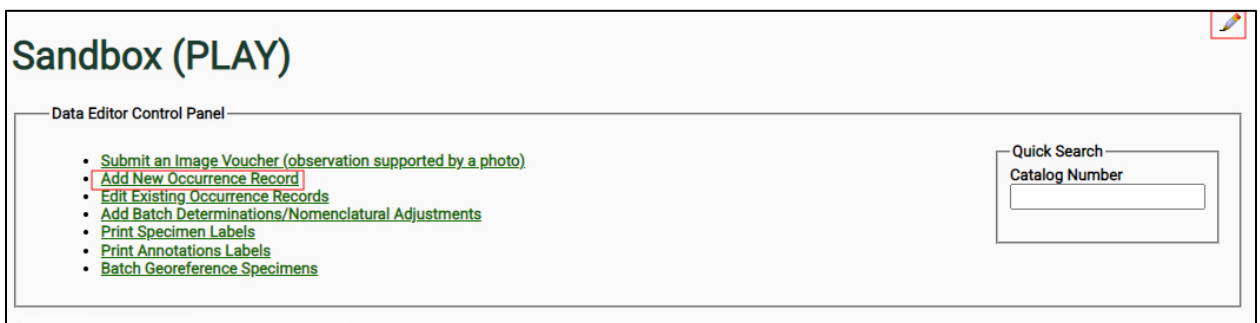
9. This will bring up a long form, but you do not need to complete all the fields for the leaf collection exercise. The next two figures show the form with only the parts you need to complete left open. You can ignore (for now) all the greyed out fields. For label project, enter "Eleaf exercise.

General Observations (OPEN)

New Occurrence Record

---Collector Info---

Catalog Number ?

Tag Name (optional) ?   Additional Identifier Value

Collector / Observer ?   Number ?   Date ?   Duplicates
Mary Barkworth   Auto search

Associated Collectors ?   Verbatim Date ?

---Latest Identification---

Scientific Name ?   Author ?

ID Confidence ? Undefined   Identification Qualifier ?
Family ?

Identified By ?   Date Identified ?

---Locality---

Country ?   State/Province =REGION County =DISTRICT   Municipality ?   Location ID ?
Somaliland

Locality ?

Security: Security not applied   ?   ☐ Deactivate Locality Lookup

Latitude   Longitude   Uncertainty ?   Datum ?   Verbatim Coordinates ?
                                        C F   <<

Elevation in Meters ?   Verbatim Elevation ?   Depth in Meters ?   Verbatim Depth ?   ⊕ Click pencil to reveal
            -           <<   -   additional fields.

---Misc---

Habitat ?

Substrate ?

Associated Taxa ?

Description ?

Notes (Occurrence Remarks) ?

Life Stage ?   Sex ?   Individual Count ?   Sampling Protocol ?   Preparations ?

Phenology ?   Establishment Means ?
                                  ☐ Cultivated/Captive

---Curation---

Type Status ?   Disposition ?   Occurrence ID ?   Field Number ?

Basis Of Record ?   Language   Label Project   Dupe Count
Human Observation ✓

Institution Code (override) ? Collection Code (override) ? Owner Code (override) ?   Processing Status
                                                                            Pending Review ✓

Data Generalizations ?

---Checklist Voucher---

10. There are two additional fields to complete. To see them, click the pencil with the plus sign. Once again, you only need to complete the fields that are not greyed out. Georeferenced by is your name. Source might be Cell phone (Samsung), GoogleMaps, Google Earth, or GPS (Etrex 20) or some other option.

Georeferenced By	Georeference Sources ?	Georeference Remarks
Georeference Protocol ?	Georef Verification Status ?	Footprint Polygon

When you have entered all your data, check it and then save it. The next document will explain how to use OpenHerbarium to print the labels you are required to add to your specimen notebook.