Module 3: Proactive Digitization

Task ID	Task Name	Explanations and Comments	Resources
T1	Collect object in field.	The processes involved in proactive digitization (collecting digital data at the time of collection) requires negotiation and discussion with collectors and commitment from collectors to standard methods of field data collecting in specific formats.	
T2	Utilize pre-formatted spreadsheet or other electronic interface for field data collection.	Populate complete record in the field or at a point prior to submission to collection staff, to include locality description, field id, date collected, georeference (lat./long.), datum, and other relevant data.	In some instances, catalog numbers may also be assigned in the field depending on institutional protocol. Several data elements should be restricted to field entry, including: ● lat./long. coordinates, ● datum, ● GPS unit name, ● accuracy as reported by the GPS device, ● locality description. It is important that datum, GPS device, and GPS-derived accuracy be included with data they are submitted. Some GPS

			manufacturers produce software that allows scripting of in-the-field interfaces for GPS units that makes data entry in the field easier and ensures greater accuracy.
T3	Record field image of specimen (to include surrounding environment when important or relevant).		Field images should not supplant the need for lab images of prepared specimens. Both are important for a complete record.
T4	Collector verifies and prepares data and specimens for depositing into repository.		
T5	Receive and accession new collection.	Note whether the accession is shared between collections.	Dependent on institutionally specific policy.
T6	Proof data to ensure accuracy prior to database import.	● Format. ● Determinations. ● Check spelling. ● Assign catalog number (if not already assigned in the field).	
T7	Upload spreadsheet to database.		
T8	Ensure that field images are associated with specimen records.		
T9	Generate specimen label from database.		
T10	Execute imaging workflow, Module 1 where relevant.		
T11	Store specimen in collection.	Some institutions will record a repository	

		location at this point.	