The William and Lynda Steere Herbarium

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Get Started with Crowdsourcing

Set goals and write a plan.

- What will the volunteers accomplish by the end of the project?
- What duties and responsibilities will be required of volunteers?
- What is the minimum number of hours required of volunteers?
- What forms of compensation will be offered (discounts, networking, events, etc.)?
- Who will have the primary responsibility for the volunteers?

RECRUITMENT

- Designate a staff employee as the Volunteer Coordinator.
- Develop relationships with career or internship centers at colleges and universities.
- Reach out to intern coordinators or career counselors who can inform students and departments of digitization opportunities.
- Post job listings on websites (Indeed, Monster, Volunteer Opportunities NYC).
- Promote your volunteer needs to local employment organizations and youth employment projects (NYC Department of Youth & Community Development).
- Partner with your volunteer services and education department. They can send volunteer applications to you or inform applicants of your digitization needs.

TRAINING

- One of the challenges that employers face is the amount of work that goes into training volunteers. Train your first volunteer(s) then have one of their early tasks be to create a training technique for future volunteers.
- Provide an orientation, including an overview of our mission, a tour, and introductions to the staff.
- Create a standardized presentation and training program.
- Delegate beginning to end projects.
- Volunteers choose a specific genus or geographic region to work on.
- Provide optional training sessions in georeferencing so students can learn the value of GIS analysis.

MANAGEMENT

- Track volunteer progress (# of records transcribed, # specimen labels, # specimen images, # of hours, etc.) in a Google spreadsheet that can be accessed from any computer.
- This will keep track of volunteers who transcribe from home.
- Know what has been done, who did the work, and the outcomes for the overall project.
- Periodically provide feedback to volunteers on their work.

Crowdsourcing Module Management

- The crowdsourcing module is used to make unprocessed records accessible for data entry by the general user who does not have explicit editing writes for a particular collection.

- Short Form -vs- Long Form: In order to simplify data entry, a shortened form is presented to the user with only a select number of fields displayed. A link to the upper right of the form allows the user to toggle between the long and short form.

- Data Protection: Certain data fields are not available for editing by the general user. These fields include catalog number, scientific name, and all fields in the determination and image tabs. However, users with explicit editing rights for a particular collection will have access to all fields and editing tabs.

1. Select records for crowdsourcing

- Skeletal records set under the processing status "Unprocessed" – are submitted to the crowdsourcing module and are available for the queue.

- Note: Records must have images of collector labels in order to be transcribable.

Adding records to the queue:

- Visit the Administration Control Panel for collection.

- Click the "Processing Toolbox" link.

- Click the "Crowdsourcing Module" tab.

Make records available for editing:

- Click the "Add to Queue" link next to "Available to Add".

- Choose Criteria and click "Add to Queue".

2. Transcribing collector information

Create an account:

- Volunteers must first create an account on the Bryophyte Portal and login (no additional permissions are required).

- After creating an account, navigate to the Crowdsource tab.

- Access a table of records for a particular collection by clicking the value in the "Open Records" field within the Collection table.

- In table view, click value in "Symbiota ID" field to edit records and view collector labels.

Get started:

- Begin transcription of collector and locality information.

- For General Transcribing instruction, refer to "Crowd Sourcing: Get Involved" page for the MycoPortal.

- For detailed instructions, see the Digitization Guidelines for digitizers.

- Keep an eye out for Exsiccati Titles.

3. Reviewing submissions

- Visit the "Crowdsourcing Module" as described above.

- The module separates volunteers and approved editors into two tables. You may individually check records per transriber or batch edit all records that need approval.

- To batch edit, click the "Review" link that is next to "Pending Approval".

Approve records:

- Set points, add comments, and edit records as desired.

- Click checkbox(s).

- Click "Submit Reviews".

- After submission, points will be allocated to each volunteer and their score will appear on the Crowdsourcing Score Board.

- Reviewed records will be set to the Processing Status "Closed (Reviewed)".