Index Herbariorum Self-Update and Self-Registration FAQ

1. How many steps are involved in editing the record for my herbarium?

There are two parts to editing the record for an herbarium:

      1 – update the information about the herbarium itself

      2 – update the information about the staff associated with the herbarium. You
will have to update the information for each associated staff member individually

2. How do I access the editable form for updating the herbarium record?
- Search for the record from the IH main page by code, name, or location
- Click the "Edit" button at the top of the page to view an editable form for the record
- Edit the existing information
- Add in information about the number of specimens in different groups in your herbarium
- Add in information about the status of databasing and imaging of specimens in your herbarium
- Add information about the data portals where specimen records from your herbarium are shared.
- Click the button that says "I am not a robot" – this is to prevent spam
- Click on the submit button when you are finished. If you do not click this button, your entries will not be saved.

3. How do I access the editable forms for updating records for associated staff?
There are two ways to access the record:
1. Search for the person using the Person Search button on the main IH Page
2. Search for the record from the IH main page by code, name, or location, then:
   - Select the record to view it. Do not click the 'Edit' button.
   - Scroll down through the record to the link that says "*View Staff and Associates*." Select that link
   - Locate the name of the person record to be edited in the staff list
   - Select that name to review the person's record.

To Edit a Person Record:

- Select "Edit" at the top of the page to access the editable form
- If the person should be indicated as Correspondent select "Yes" under correspondent.
- If the person currently listed as Correspondent should no longer be listed as such, select "No" under Correspondent for this person, then go to the record for the new Correspondent, and set their value to "Yes" for this field (If the new correspondent is a new staff member, see item 5. below.
- To disassociate a person from a herbarium record, see item 6. below

4. *How do I enter a record for new herbarium?*

1. Select a code for your herbarium that is six or fewer letters – no numbers or other symbols. Test to be sure your code is not already in use by searching for it in the Index.

2. Download the registration form (http://sweetgum.nybg.org/science/docs/IH_Registration_Form_2017.docx) and the Index Herbariorum Registration Form Example (http://sweetgum.nybg.org/science/docs/IH_Registration_Form_2017_Example.docx).

3. Gather all the data you will need to complete the form online so you can make all needed updates at one time.

4. Once the registration form document is complete, transfer this information to the online registration form

5. Create the record for the new herbarium and then create the records for the associated staff here: http://sweetgum.nybg.org/science/ih/ihh-create-new.php

5. *How do I enter a record for a new person?*
The recommended procedure for doing so is as follows:

1. Download the registration form (http://sweetgum.nybg.org/science/docs/IH_Registration_Form_2017.docx) and the Index Herbariorum Registration Form Example (http://sweetgum.nybg.org/science/docs/IH_Registration_Form_2017_Example.docx).

2. Once the registration form document is complete, transfer this information to the online registration form: http://sweetgum.nybg.org/science/ih/ihp-create-new.php

6. *How do I remove a person who is no longer associated with my herbarium?*
1. Go to the record for the person (see 3. above)
2. Click the "Edit" button
3. Scroll to the field "Current Status"
4. Change the value to "retired" or "deceased."
5. The record for this person will be disassociated with the institutional record during the approval process.
5. If the person to be removed is now working at another herbarium, you might prefer to have that person enter his or her new information.

7. *How can I change the Correspondent for my herbarium?*

If the person currently listed as Correspondent should no longer be listed as such, select "No" under Correspondent for this person, then go to the record for the new Correspondent, and set their value to "Yes" for this field (If the new correspondent is a new staff member, see item 5).

8. How can I have more than one Correspondent appear on the main herbarium page?

Go the record for the person who should also be listed on the main page. See item 3. For information o how to access that record. Click the "Edit" link at the top of the page. Scroll down through the record to the field for "Secondary Correspondent" and set the value to "Yes." Repeat the process for as many staff who should be listed on the opening page. The Primary Correspondent will always be listed first.

9. I just made changes to to my Index Herbariorum record and associated staff but I cannot see these changes online. Why?

All changes submitted must be approved by the Editor before accepted. Once accepted, the changes will appear online after the next overnight refresh of the website. Changes submitted on the weekend may not appear until the following Tuesday.

10. Can I create a record for a new staff member by just replacing information on an existing staff record?

No. The information will not display correctly on line if you do this. Add a new staff member as described under item 5, and indicate that the former staff member is no longer associated as described in item 6 above.

11. What is the "Create New" Option at the top of the record?

This a short-cut to use for creating the record for a new herbarium (from an existing herbarium record) or a record for a new person (from an existing person record). Using this method will not affect the record currently displayed on the screen.

12. I have information about an herbarium that has not updated its Index Herbariorum record. How can I send it to you?

We are eager for all information about herbaria, especially those that have not updated recently. There are several ways to supply this information:

1. Put a note in the comment field for that institution
2. Edit the record for that institution, if you have permission from the Correspondent or other responsible party at that herbarium. Your name and the date of the update will appear in the record. The Editor will attempt to verify information submitted about an institution by someone not associated with that herbarium.