

Preparing & Submitting Paleontological Catalog Data for BLM

(Updated June 2015 by T. Murphy, BLM National Curator-Acting)

Contract catalogers, cooperators, repositories, or others who manage and/or document paleontological resource specimens to be permanently retained in Department of the Interior- Bureau of Land Management (DOI-BLM) museum collections may be responsible for ensuring that the collections are cataloged in the DOI's collection management system, ICMS. If you have any of the above-referenced responsibilities, follow the instructions below to submit the catalog records to the responsible BLM curatorial staff.

Before starting your project, contact the responsible BLM curator or BLM state paleontological lead (referred to as curator in this document) to select a documentation option to use for entering catalog data (see two options below), and receive instructions on submitting catalog data.

Select a Documentation Option:

Option 1–ICMS: Contact the BLM curator for instructions on how to obtain and install a copy of the ICMS and enter the catalog data directly into it. This option allows for user-friendly data entry and ensures that entered data conform to the required formats. When data entry is complete, provide an ICMS backup file to the responsible curator, who will provide data to the BLM national curator for import into the BLM's central ICMS installation. In addition to the ICMS User Manual sections cited below, you will also need Chapter 1: System Basics, to learn the basic navigation and data entry techniques of the program. ICMS training videos are available on YouTube at the DOI U channel <https://www.youtube.com/playlist?list=PLD91EE970691B3ABF>, or by searching DOI ICMS in the YouTube search window.

Option 2–Excel Template: Obtain appropriate Excel templates from the responsible BLM curator. Enter catalog data on the templates. If you choose this method, you will be responsible for ensuring that your data conform to the guidance in the ICMS User Manual. Provide the completed Excel files to the responsible BLM curator, who will provide data to the BLM national curator for import into the BLM's central ICMS installation.

Prepare and Submit Catalog Data

For either documentation option, if you are cataloging Paleontology specimens for BLM collections, follow these procedures and any additional procedures that the BLM curator may provide:

1. Acquire a copy of the pertinent chapter(s) of the ICMS User Manual. Each chapter describes the mandatory and optional data fields, with field-by-field descriptions, approved data values, and formatting. Read these chapters to understand NPS cataloging requirements. Download the manual chapter(s) at: <ftp://ftp.rediscov.com/ICMS/ICMSManual>

You will need: Chapter 2: Cataloging a Paleontology Specimen

2. (Documentation Option 2 only): Template files in MS Excel format are available for Paleontology. Enter data for the specimens using one row per catalog number/specimen. Use the catalog and accession numbers to identify the specimens. Complete all mandatory columns with the required data, and any other columns for which you have applicable data. Enter data with appropriate values, in the proper format, as described in the ICMS User Manual. See Detailed Instructions for Excel Templates below.

- Send the completed Excel file or ICMS backup to the BLM curator, who will provide data to the BLM national curator for import into the BLM's central ICMS installation. The BLM national curator will review the data for completeness and conformity with data standards. When the data is determined to be acceptable, the BLM national curator will import the data into the ICMS, following the instructions in the ICMS User Manual, Chapter 8: Moving and Sharing Data.

Detailed Instructions for Excel Templates

The Excel templates include a header row showing the field names as they appear in ICMS. Field names in the header row that **are highlighted in orange are mandatory fields which must be completed**. Field names highlighted in **blue are “Collection Management” fields for BLM use, some of which are also mandatory**. Other fields are optional, but should be completed if appropriate data is available.

Do not alter the field names in the header row. Do not add additional columns, or re-arrange the columns in the template. It is permissible to delete columns that are not used; doing so will simplify the import to ICMS. The researcher and the park curator should coordinate on which columns are deleted.

The templates include a “freeze pane” setting, so the Catalog # column is always visible on the left, and the column header row is always visible at the top.

The templates include the “auto filter” setting on the column header row, so you can review the consistency of your data as you enter records.

The templates also include a sample row, showing data for a sample record. This data provides an example of proper formatting, spelling, and case of standard terms. Not all possible standard terms are shown for the example record. Refer to the ICMS User Manual, Chapter 2, for field-by-field specific examples and lists of standard terms for each field, where applicable. Before sending the completed Excel file to the BLM curator, you should delete this sample row.

The Catalog # and Accession # columns have been formatted with Courier New, a fixed width font. This makes it easier to view the standard format of these fields, to ensure that data is properly entered.

Mandatory Fields

The Excel templates include a header row showing the field names as they appear in ICMS. Field names in the header row that are highlighted in orange or blue are mandatory fields that must be completed.

In ICMS, these mandatory fields must contain data in order for the catalog record to be considered complete and valid. In some cases the cataloger using the Excel template may need instruction from the park curator on how to complete certain mandatory fields (such as Condition or Controlled Property). Below are the mandatory fields for all NPS Natural History catalog records. Refer to ICMS User Manual, Chapter 2, for a complete description of each of these and the other optional data fields.

Mandatory Fields for Natural History Catalog Records in ICMS
Catalog #
Accession #
Classification Lines 1-4 (Includes Kingdom, Phylum/Division, and Class)
Scientific Name (includes Genus, Species, etc.)
Item Count or Quantity (Item Count if individual specimens, or Quantity if in bags, boxes, etc.)
Storage Unit (either “EA” for individual specimens, or BAG, BOX, etc. as appropriate)
Collector, Collection #, and Collection Date
Identified By
Latitude/Longitude, or Township/Range/Section, or UTM Coordinates
Period/System
Formation

Controlled Property – Y or N (high value, on exhibit or loan, are controlled property)
Location (location in storage)
Object Status (Storage, Loan, Exhibit)
Status Date (Date object placed in storage, loan, exhibit)
Catalog Folder – Y or N (an extension of accession folder. Not required, but note if created)

Fields with Special Formatting

Some fields in ICMS require special formatting. When data is entered directly into ICMS, the program enforces the proper format for these fields. This enforcement is not available in the Excel templates, so the cataloger must ensure that the correct format is used. Failure to use the proper formatting can cause the import to fail, and can cause additional cleanup work for the researcher or BLM curator. **Note:** For valid entries in fields controlled by authority tables, please refer to the ICMS User Manual, Chapter 2.

Classification: Class 1-4 for Geology, or Class 1, Kingdom, Phylum/Division, Class, Order, and Family for Biology and Paleontology	Refer to the ICMS User Manual Chapter 2. The Class 1 field is always BIOLOGY, GEOLOGY, or PALEONTOLOGY. Biology and Paleontology disciplines use the Integrated Taxonomic Information System (ITIS) taxonomy in the Kingdom, Phylum/Division, Class, Order, and Family fields. (See http://www.itis.gov/ .) The Geology discipline uses Class 2-4 as defined in the 411DM - Museum Handbook Part II, Appendix H: Natural History and the Hierarchical Classification Outline (HCO).
Condition	Condition of the specimen. ICMS includes a list of valid entries. The terms “COM/GD” (for Complete/Good) or “COM/FR” (for Complete/Fair) are usually acceptable for recently collected specimens.
Scientific Name	Contains a set of subfields such as Genus, Species, Subspecies, etc. The Excel template uses separate columns for these subfields. Enter the data in the appropriate subfield.
Storage Unit	Either “EA” for individual specimens, or BAG, BOX, etc. as appropriate. When entering the number of specimens in the Item Count field, Storage Unit is always EA. When entering the quantity of specimens in the Quantity field, the Storage Unit is never EA.
Item Count or Quantity	Item Count if individual specimens, or Quantity if in bags, boxes, etc. Enter only an Item Count or a Quantity, never both.
Latitude/Longitude	Contains a set of subfields for degrees, minutes and seconds of latitude and longitude. Enter the data in the appropriate subfield.
Township/Range/Section	Accepts a 5-character township, 6-character range, 3-character section, and 2-letter abbreviations for each quarter section: T.12345 __R.ABC123 __Sec.123 __NE 1/4 __SW 1/4 __SE 1/4 Use the space-underscore-underscore delimiters as shown here to separate each subfield.
UTM Coordinates	Formatted to accept 2 digits, a slash, 6 digits, a slash, and 7 digits: “12/123456/1234567”

Common Mistakes Found In Excel Imports

1. Incorrect terms used in fields controlled by ICMS authority tables. One example is a condition of “Complete” rather than “COM/GD” or “COM/FR”. Another incorrect term used is, an object status of “in storage” rather than “STORAGE”. Review the acceptable authority terms for such fields in Chapter 2 of the ICMS User Manual. Using incorrect terms in your Excel file and importing them to ICMS will create additional work for you or the curator to correct the data.

2. **Column headers in Excel that do not match the field names in ICMS**, either due to typos, or due to having extra columns in Excel that don't have a match in ICMS. **When using the Excel templates, do not add additional columns or edit the column headers. Empty columns may be deleted to simplify the import to ICMS.**