

# Electronic Field Notes

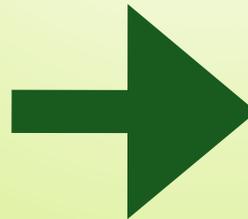


**BG-BASE™**  
Collections Management Software

August 2008

# Goal

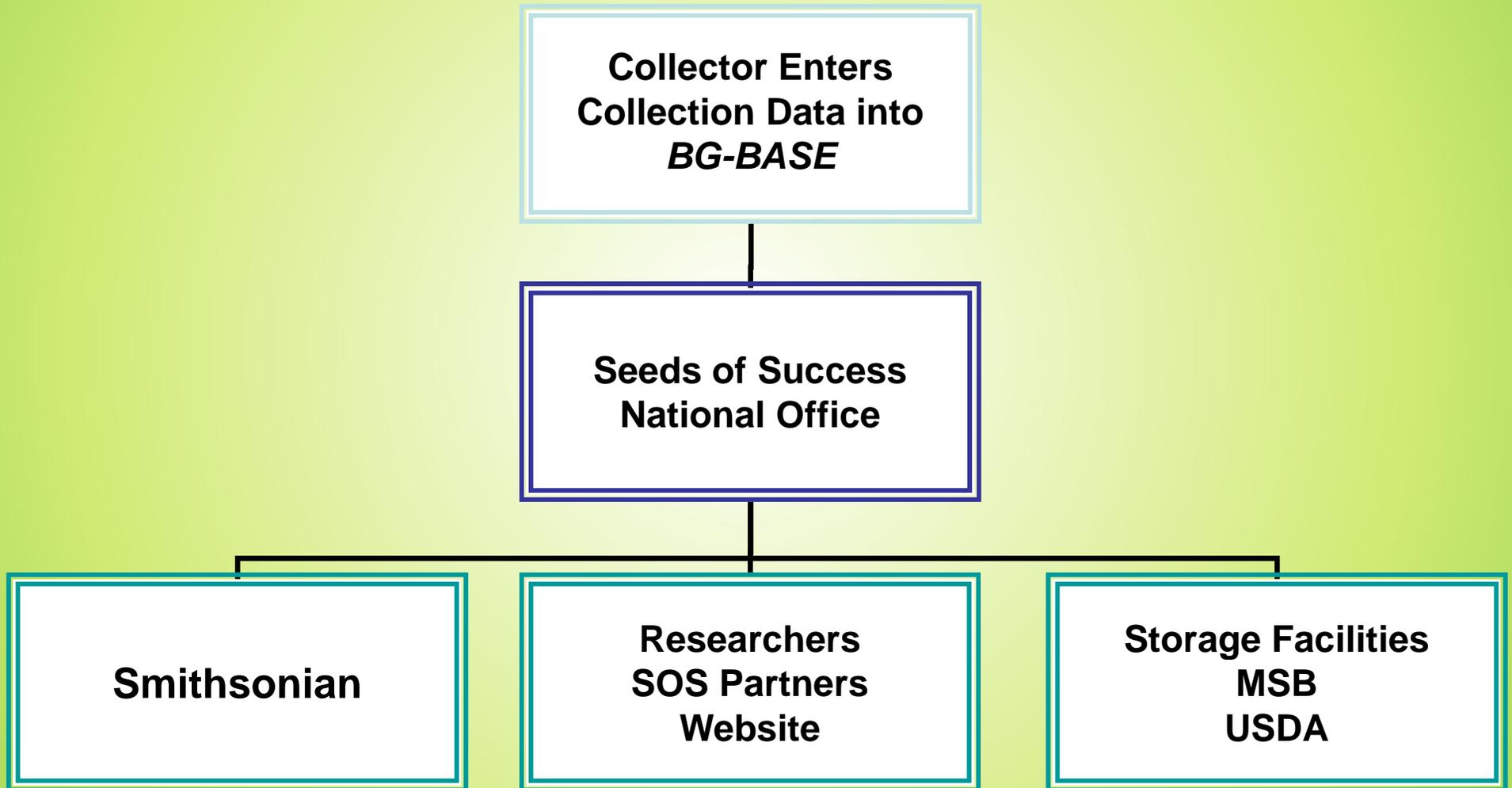
Reduce data entry while maintaining, if not improving, the quality of information being captured, allow for transfer of data between and within institutions, and enable collecting teams to database their collections.



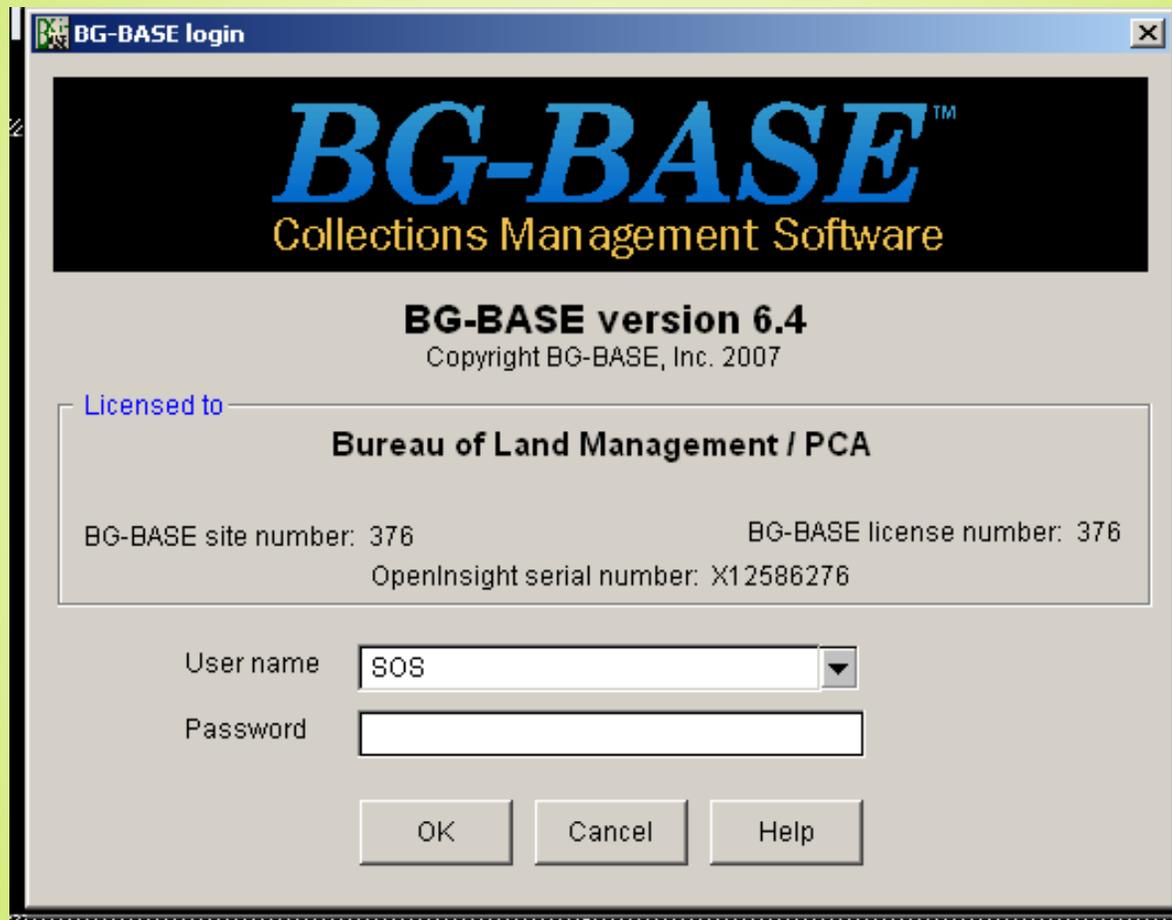
# Current Process

1. Collector fills out Field Data Form
2. Collector re-types the information in an electronic format and faxes, mails, or e-mail it to the National Office
3. National Office re-enters the data
4. Storage facilities enters the data
5. Smithsonian enters the data

# New Process



# Creating an Accession Record



The screenshot shows a window titled "BG-BASE login". At the top, there is a logo for "BG-BASE™ Collections Management Software". Below the logo, it says "BG-BASE version 6.4" and "Copyright BG-BASE, Inc. 2007". A section titled "Licensed to" contains the text "Bureau of Land Management / PCA". Below this, it lists "BG-BASE site number: 376", "BG-BASE license number: 376", and "OpenInsight serial number: X12586276". There are two input fields: "User name" with a dropdown menu showing "SOS" and "Password" with an empty text box. At the bottom, there are three buttons: "OK", "Cancel", and "Help".

**Password: SOS**

# Creating an Accession Record

## Key Strokes:

Alt-O = Pulls up previous record's information

Ctrl-N = Adds a line

Ctrl-D = Deletes a line

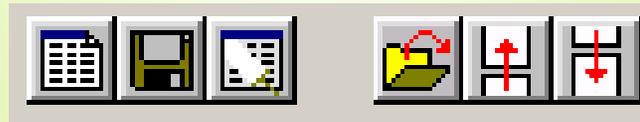
Tab = Moves from field to field

F1 = Help

F2 = Options

## Buttons/Shortcut Keys

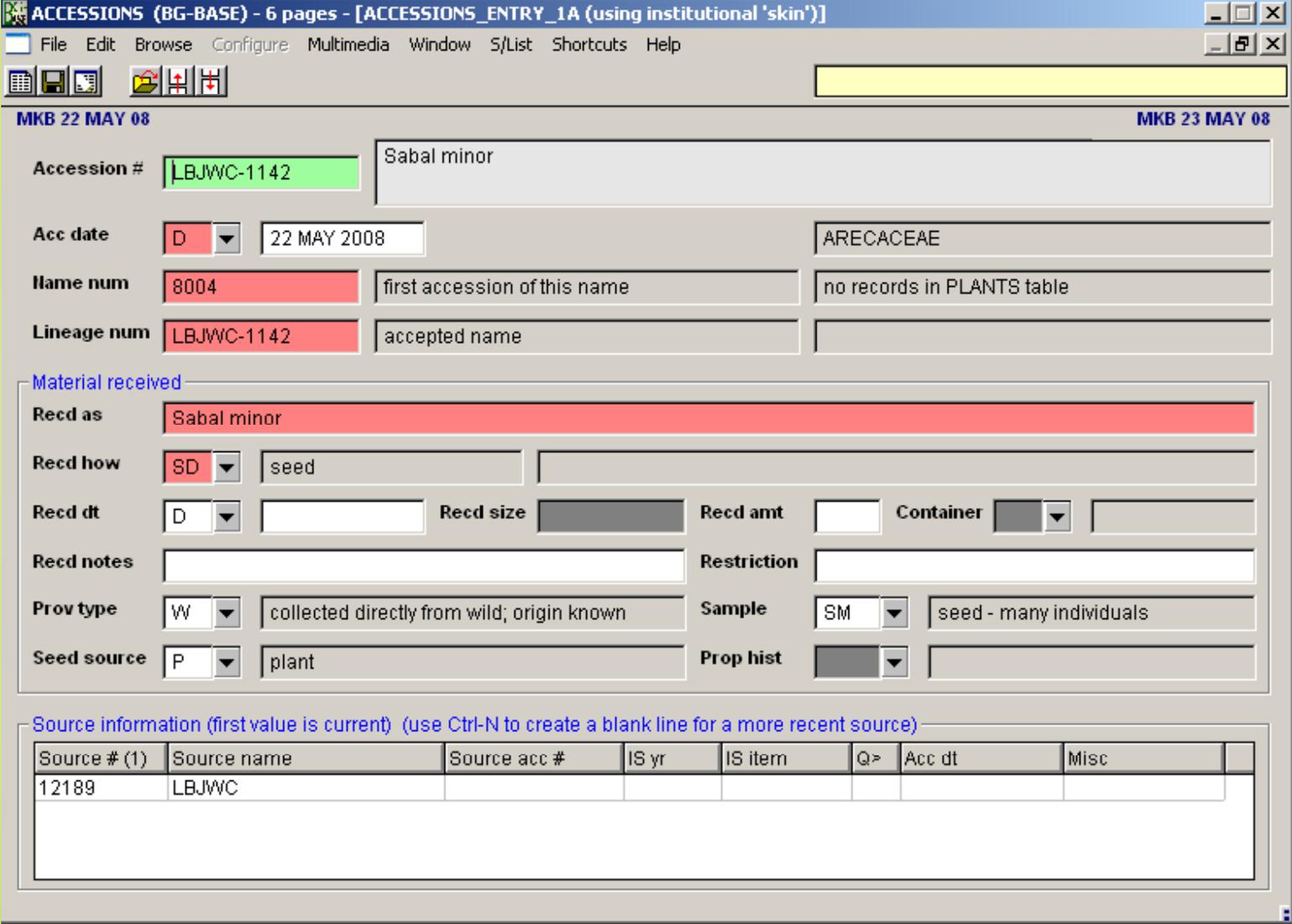
1 2 3 4 5 6



1. Create New Record - not used
2. Save – F9
3. Clear Screen without saving – F8
4. Browse – Ctrl-G
5. Page Up – Alt-Page Up
6. Page Down – Alt-Page Down
7. Name Query Shortcut –  
first3lettersofgenus]  
first3lettersof species]

# Creating an Accession Record

## ACCESSIONS Table:



ACCESSIONS (BG-BASE) - 6 pages - [ACCESSIONS\_ENTRY\_1A (using institutional 'skin')]

File Edit Browse Configure Multimedia Window S/List Shortcuts Help

MKB 22 MAY 08 MKB 23 MAY 08

Accession # **LBJWC-1142** Sabal minor

Acc date **D** 22 MAY 2008 ARECACEAE

Name num **8004** first accession of this name no records in PLANTS table

Lineage num **LBJWC-1142** accepted name

Material received

Recd as **Sabal minor**

Recd how **SD** seed

Recd dt **D** Recd size Recd amt Container

Recd notes Restriction

Prov type **W** collected directly from wild; origin known Sample **SM** seed - many individuals

Seed source **P** plant Prop hist

Source information (first value is current) (use Ctrl-N to create a blank line for a more recent source)

Source # (1)	Source name	Source acc #	IS yr	IS item	Q>	Acc dt	Misc
12189	LBJWC						

ACC\_NUM (Accession #) = Collection Number  
Sequential, unique, and collector assigned

# HELP – F1

## **ACC\_NUM**

The accession number is a combination of the COLL\_ID and COLL\_NUM, sequential, unique, and never to be used twice. Example: CO932-55

## **ACC\_DT**

The accession date is the date the record was logged in BG-BASE, not always the same as the collected date.

## **NAME\_NUM**

If a name cannot be located in the NAMES file after a search, link this record to NAME\_NUM 0 “Name to be created in the Washington Office”. Then, fill in the correct name in the RECD\_AS field.

## **RECD\_AS**

The received name will default to the accessioned name, unless otherwise specified by the user.

Example:

If a collection was made as *Keckiella antirrhinoides* ssp. *antirrhionoides*, accessioned under that name, but after creating the accession record and sending it to the National Office the material is identified as *Keckiella antirrhinoides* ssp. *microphylla* the received name (RECD\_AS) should remain *Keckiella antirrhinoides* ssp. *antirrhionoides*, however the accessioned name should be changed to reflect the correct name. Please notify the National Office when such changes are made.

# HELP – F1

## **RECD\_DT**

Please use the RECD\_DT field to store the date the collection material was sent to Kew or Bend.

## **PSOURCE\_NUM**

The PSOURCE should reflect the institution that made the collection, not the collecting team.

BLM - 12187

CBG - 12191

LBJWC - 12189

NCBG - 12194

MCC - 12190

ZSSD - 12197

NEWFS - 12196

NYCDPR-BBG - 12193

VNPS - 12195



Accession # **LBJWC-1142** Sabal minor

Original collection information

Collector id **LBJWC** Collector **Lady Bird Johnson Wildflower Center** Coll with **Eason, M., Leighton, D.,**

Collection number **1142** Coll dt **17 NOV 2007** 2nd coll dt  Phen > **Phenology**

Date as given  Coll time

Georef source **GPS** Georef source DS  Datum **WGS84**

Accuracy **G** GPS accuracy  Cert  Introd  Cult

Place num

Region  Phyto-region **34E** **Western Gulf Coastal Plain**

Country **US** **USA** Country as given

BRU  Latitude **30** ° **55** ' **13.1** " **N**

Sub ctry 1 **Texas** Sub ctry 2 **Liberty** Longitude **94** ° **47** ' **36.3** " **W**

Sub ctry 3  Geog area **Champion Lake** Latitude decimal **30.92030** Longitude decimal **-94.79341**

Land\_owner **FWS** Loc sens  UTM  National grid

Locality **Trinity River National Wildlife Refuge. South of Levee.**

# HELP – F1

## **COLL\_ID**

COLL\_ID should reflect the collecting team number, this entry will flood fill the 'Collector' field with the full team name.

*Examples:* NV030, CBG, NCBG, or CO932

## **COLLECTED\_WITH**

Collectors' name should be entered as last name, first initial.

*Examples:* Dawson, C., Howard, M., Tonenna, D., Ulloa, M., Seevers, J., Johnson, J., Walker, A., Vergara, S.

## **COLL\_NUM**

The collection number is the sequential, unique, and collection team assigned number. This number should never be used twice.

## **DATE\_AS GIVEN is not a substitute for COLL\_DT**

COLL\_DT: The single date a collection was made, after which no additional material was collected.

SECOND\_COLL\_DT: The second date that material, of the same COLL\_NUM, was collected. This date MUST be within a month of the first COLL\_DT in order for the material to be added the initial collection under the same COLL\_NUM.

DATE\_AS\_GIVE: If the collection dates span more than two dates, enter the range of dates, or >2 individual dates in DATE\_AS\_GIVE. This set of several dates or range of dates must be within one month of the first collection date for all of the material to be included under one COLL\_NUM.

*Example:* 5/10/07, 5/11/07, 5/20/07 or 5/10/07 to 6/9/07

# HELP – F1

## **SUB\_CNT1 = State**

Spell out the entire name, no abbreviations.

## **SUB\_CNT2 = County**

No need to spell out 'County', as it will appear on the data form when the data is exported. If the county is unknown, but the town, city, or park is known please skip to SUB\_CNT3.

## **SUB\_CNT3 = City, town, village, park, forest, or refuge**

Spell out the entire name of the municipality.

*Example:* Phoenix, Sonoran Desert National Monument, or Grand Canyon National Park

## **LAND\_OWNER**

Reflects the public agency or municipality that is responsible for the land on which the collection was made. Omit private individuals' names. You **MUST** keep written permission on file in your office if a collection was made on private land.

*Example:* U.S. Forest Service or Potter County Parks Division

## **LOCALITY**

A locality description should be specific enough to lead another reader of the collection information to the exact site the material was collected without use of the lat/longs. Locality is written in complete sentences and use appropriate capitalization and proper name rules. If SUB\_CNT3 is filled with a town name, but a park name is known include it in LOCALITY.

*Example:* 3 miles north on Route 4 from downtown Topsham, take a left into the Cold Spring Campground. Take the Clover Valley Trail ca 1 mile to the open pasture.



MKB 22 MAY 08

MKB 23 MAY 08

Accession #

Original collection information (continued)

Altitude  Unit  Qual  Alt (in m)  Depth  Unit  Qual

Slope  Aspect  Geomorphology

Habitat type  Habitat  Vegetation

Geology  Soil  Substrate

Hydrology  Precipitation  Sex of material

Abundance  Population  Qual  Area of occupancy  Unit

Description

Coll misc

Local name*	Lang >	Language	Uses
dwarf palmetto			

Associated taxa	Assoc taxa #	Associated taxa	Abundance >	Int code >	Interaction
	6872	Nyssa aquatica			
	5969	Ilex decidua			
	11187	Heliotropium indicum			

# HELP – F1

## **GEOMORPHOLOGY**

Reflects the type of land form, NOT a specific location. Always CAPITALIZE the first letter, following letters and words should be lower-case.

*Example:* Mountain, Foothills, or Sand dune

## **DESCRIPTION**

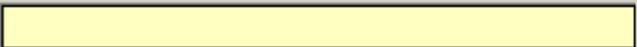
Additionally, please capture the average height of the plants sampled here.

*Example:* Light pink flowers, thorny. Height: 2'

## **COLLECTION\_MISC**

Captures your miscellaneous notes regarding the collections, and should ALWAYS include the number of plants sampled.

*Example:* 367 plants sampled.



MKB 22 MAY 08

MKB 13 AUG 08

Sabal minor

**Accession #**

LBJWC-1142

User1

LAND USES

User1  
Conservation

Configure

User2

MODIFYING FACTORS

User2

Configure

User3

EVIDENCE OF DISTURBANCE

User3  
No damage

Configure

User4

IDENTIFICATION

User4  
In field  
Eason, M. - LBJWC  
11-17-2007

Configure

User5

HERBARIUM VOUCHER

User5  
5

Configure



MKB 22 MAY 08

MKB 23 MAY 08

Sabal minor

Accession #	
LBJWC-1142	
User6	User6
STORAGE FACILITY	LBJWC
Configure	MSB
User7	User7
IMAGES NOTES	SAMI8_LBJWC-1142_A.jpg
Configure	SAMI8_LBJWC-1142_B.jpg
	SAMI8_LBJWC-1142_C.jpg
User8	User8
(undefined)	
Configure	
User9	User9
(undefined)	Germination Protocols
Configure	Long-term conservation
User10	User10
(undefined)	
Configure	

# HELP – F1

## **USER1 - Land Use**

*Example:* Recreation, Timber, Wildlife, and/or Livestock Grazing

## **USER2 - Modifying Factors**

*Example:* Occasionally mowed, Sever grazing, and/or Periodic flooding

## **USER3 - Evidence of Disturbance**

*Example:* Large herd of deer present, Freshly mowed, and/or Evidence of recent burn

## **USER4 - Identification Details**

*Example:* Use a separate line for each new piece of information.

Dawson, C. - BLM

In field

7-5-2006

## **USER5 - Number of Herbarium Vouchers**

No less than 2 specimens should be taken for each collection.

## **USER6 - Storage Facility**

*Example:* Bend, Kew, Ft. Collins, etc..

## **USER7 - Images**

3 images should be taken for each collection; material collected, plant habit, and habitat. Images should be sent to the National Office. Use the NRCS PLANTS code, collection team code, and collection number to name the files.

*Example:* PEAC3-WY040-235-A

PEAC3-WY040-235-B

PEAC3-WY040-235-C

## **USER8 - Permit Details**

*Example:* Written permission obtained from private landowner, on file at office.

## **USER9 - Native plant materials development project this accession will be used for**

*Example:* Germination Protocol, Long-term Conservation, Common Garden Study, etc.

## **USER10 - Ecological Site Descriptors (is used)**

<http://esis.sc.egov.usda.gov/Welcome/pgReportLocation.aspx?type=ESD>

# Reviewing Data

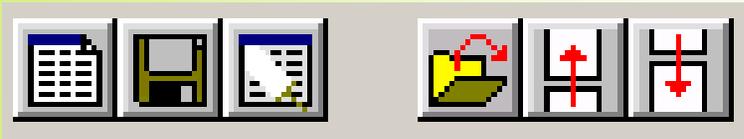
S/List: select accessions

S1 sos

G1 sos

ACCESSIONS

Browse



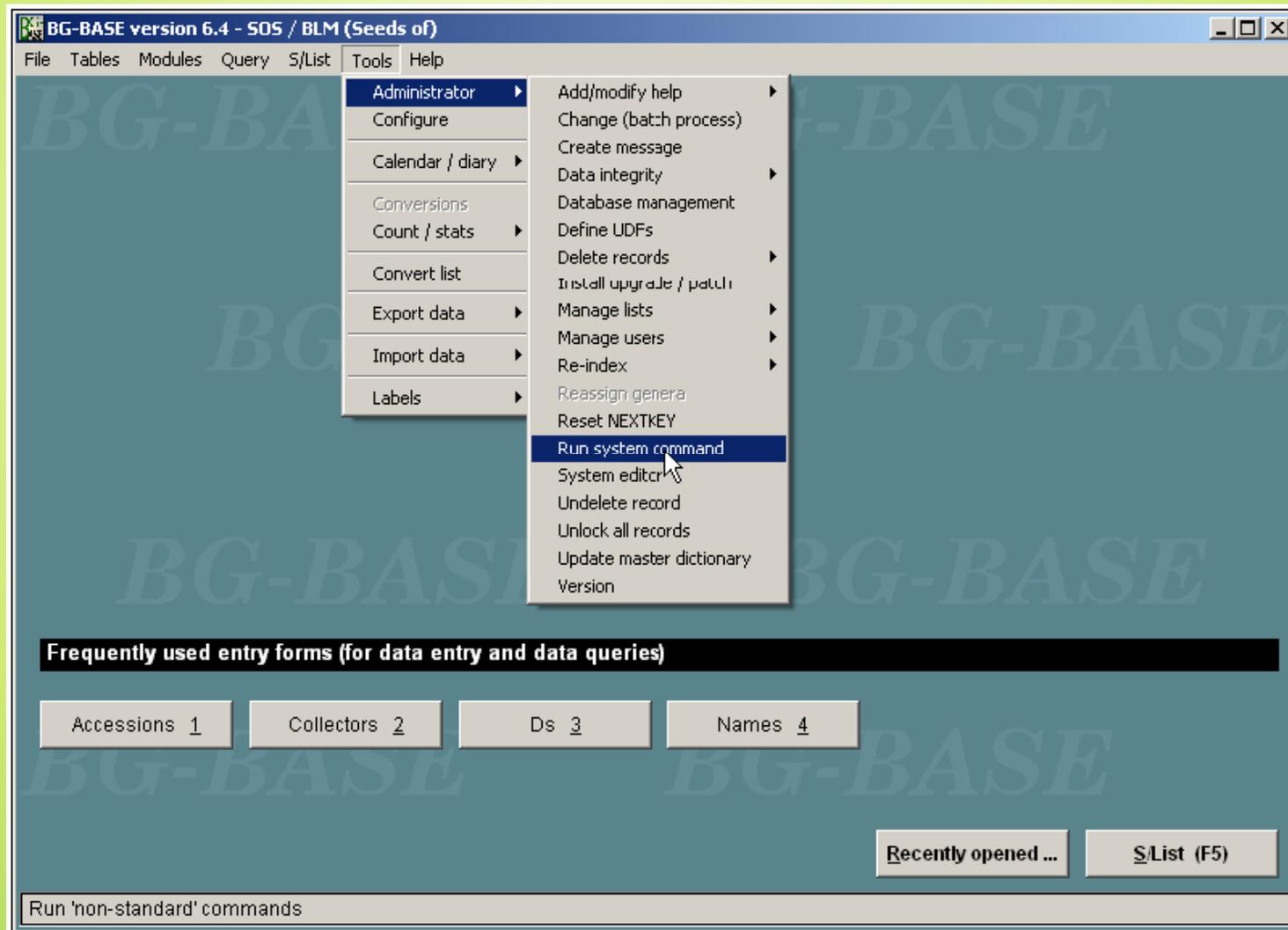
Flip through records



# Exporting Data

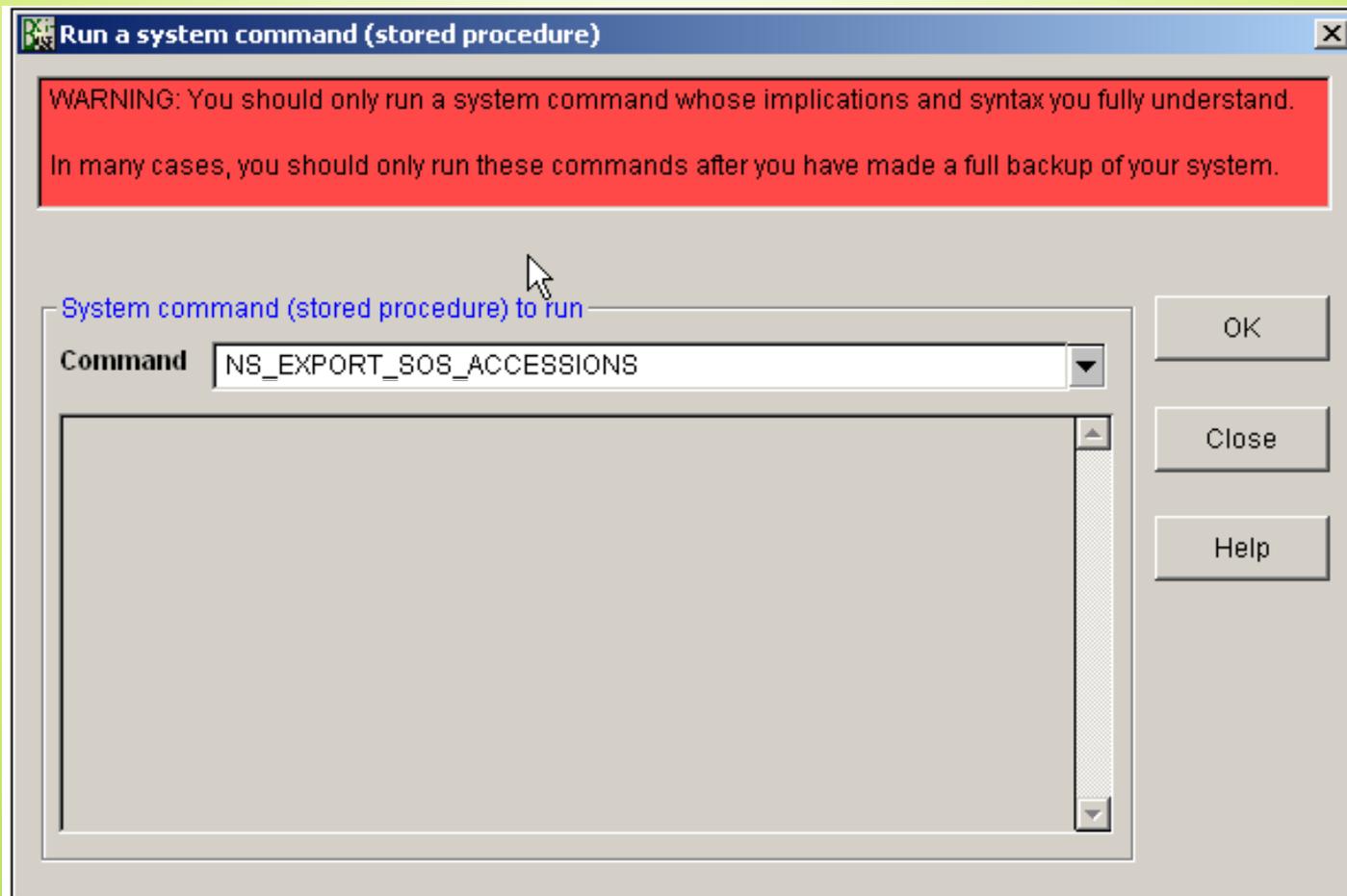
Data is first exported from the **ACCESSIONS** table into the **SOS** table as follows:

1. Choose **Tools -> Administrator -> Run System Command**



# Exporting Data

2. In the next window, click on the down-arrow, choose `NS_EXPORT_SOS_ACCESSIONS`, then click OK



# Exporting Data

3. You will receive a message asking if you wish to copy all records from the **ACCESSIONS** table to the **SOS** table; answer 'Yes'
4. Click O.K. on the 'Export Complete' message.

The data has now been transferred to a folder called **SOS** in your **BGBASE6** folder and is ready to be emailed.

# Exporting Data

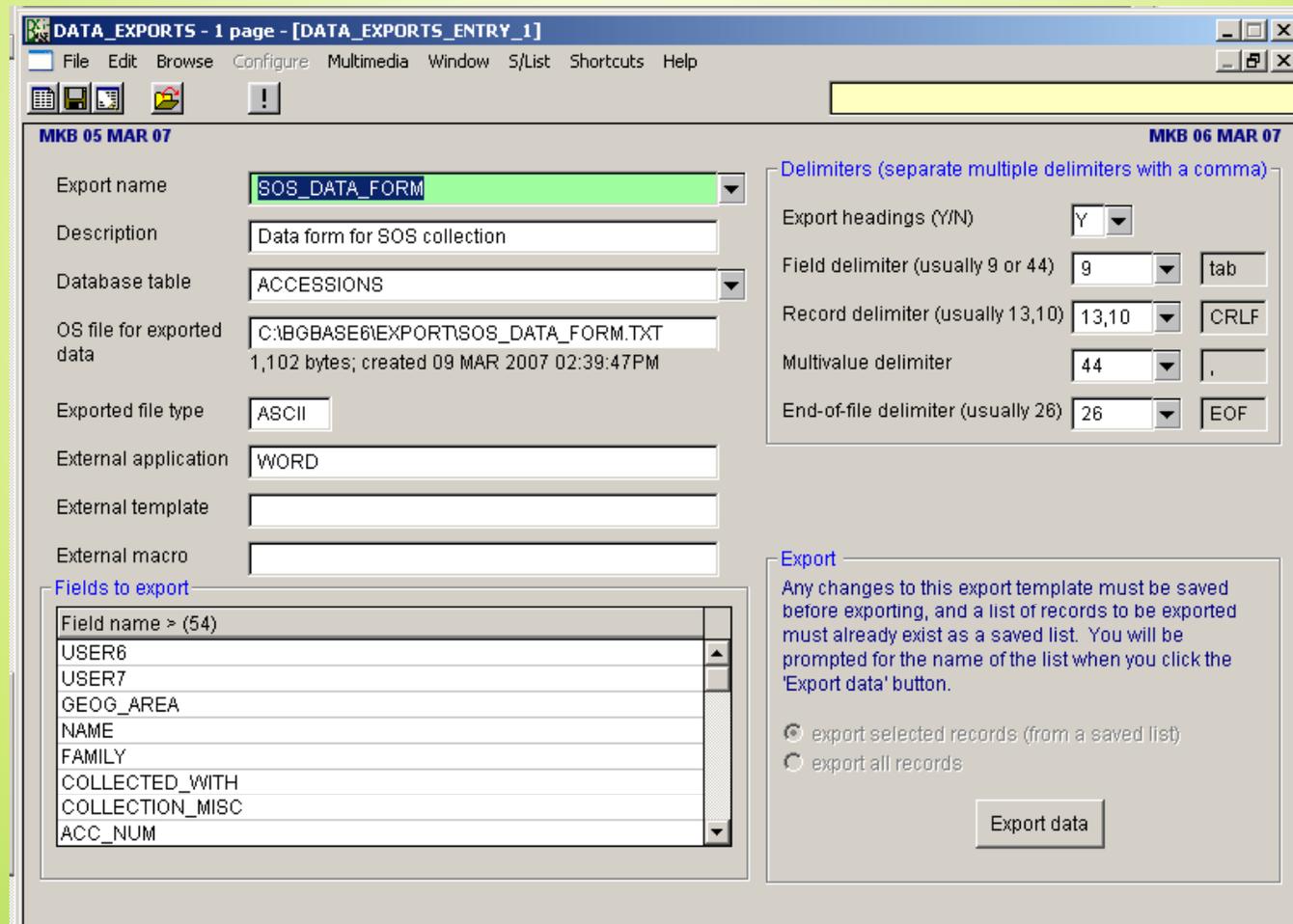
A hardcopy of SOS Data Forms need to be included with seed and herbarium shipments to Kew and herbarium shipments to the U.S. National Herbarium at the Smithsonian, and Bend Collections

S/List: select accessions

SL: SOS

Open DATA\_EXPORTS Table

Export Name: SOS\_DATA\_FORM



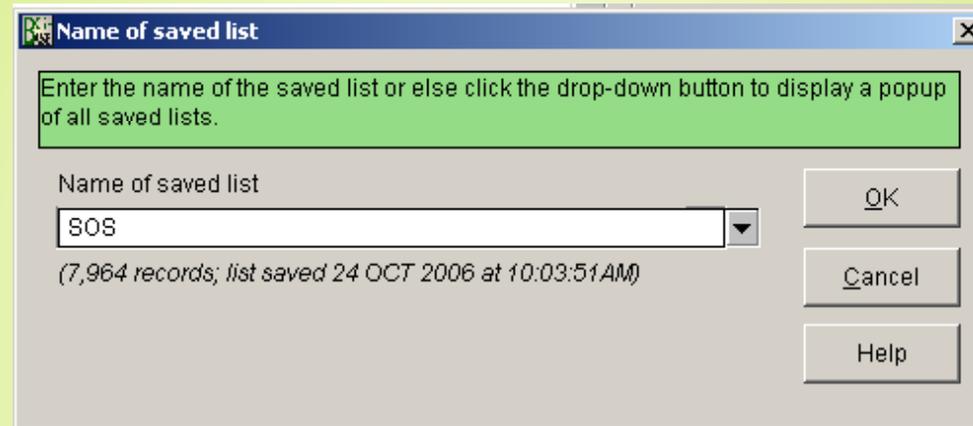
The screenshot shows the 'DATA\_EXPORTS - 1 page - [DATA\_EXPORTS\_ENTRY\_1]' application window. The interface includes a menu bar (File, Edit, Browse, Configure, Multimedia, Window, S/List, Shortcuts, Help) and a toolbar. The main area is divided into several sections:

- Export name:** A dropdown menu with 'SOS\_DATA\_FORM' selected.
- Description:** A text field containing 'Data form for SOS collection'.
- Database table:** A dropdown menu with 'ACCESSIONS' selected.
- OS file for exported data:** A text field showing 'C:\BGBASE6\EXPORT\SOS\_DATA\_FORM.TXT' with a file size of 1,102 bytes and a creation date of 09 MAR 2007 02:39:47PM.
- Exported file type:** A dropdown menu with 'ASCII' selected.
- External application:** A text field containing 'WORD'.
- External template:** An empty text field.
- External macro:** An empty text field.
- Delimiters (separate multiple delimiters with a comma):**
  - Export headings (Y/N): 'Y' selected.
  - Field delimiter (usually 9 or 44): '9' selected, with a 'tab' button.
  - Record delimiter (usually 13,10): '13,10' selected, with a 'CRLF' button.
  - Multivalue delimiter: '44' selected, with a '.' button.
  - End-of-file delimiter (usually 26): '26' selected, with an 'EOF' button.
- Fields to export:** A list box titled 'Field name > (54)' containing the following fields: USER6, USER7, GEOG\_AREA, NAME, FAMILY, COLLECTED\_WITH, COLLECTION\_MISC, and ACC\_NUM.
- Export:** A section with a warning message: 'Any changes to this export template must be saved before exporting, and a list of records to be exported must already exist as a saved list. You will be prompted for the name of the list when you click the 'Export data' button.' Below the message are two radio buttons: 'export selected records (from a saved list)' (selected) and 'export all records'.
- Export data:** A button at the bottom right of the window.

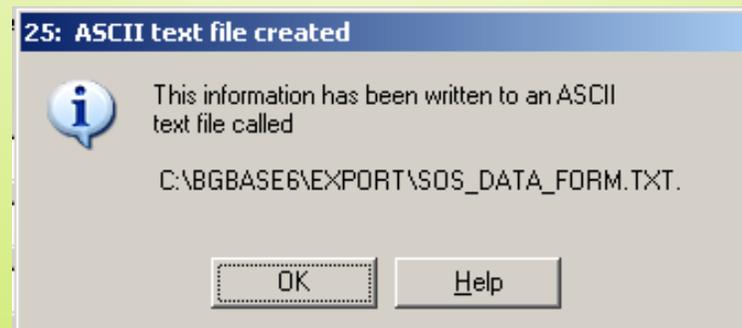
Two red arrows point towards the 'Export name' dropdown and the 'Export data' button.

# Exporting Data

Click Export Data, enter the name of your saved list (sl): SOS



When all records have been exported this message will appear:



# Exporting Data to SOS Data Form

1. Click on the 'Microsoft Works Word' Icon on your Desktop
2. Open Template: C:\bgbase6\template\SOS DATA FORM.doc
3. Go to Tools -> Mail Merge -> Open Data Source
4. Select Merge information from another type of file
5. Set file type: Text Files
6. Browse to C:\bgbase6\EXPORT\SOS DATA FORM.txt
7. Yes – you want to use entries in the first row of your data as field names
8. Select Tab – OK
9. Insert Fields: View Results.
10. Save As: Do not save as SOS\_DATA\_FORM.wps, use a different name
11. Print: Kew, Smithsonian, Bend, review data, etc.

# E-Mailing Data

- The contents of the SOS folder should be compressed into a single 'zip' file and emailed to mary\_byrne@blm.gov after the export has been completed. The contents of the SOS folder will consist of the following files:

REV24000.LK  
REV24000.OV  
REV24001.LK

REVLOCKS  
REVMEDIA.LK  
REVMEDIA.OV

REV24001.OV

- Please note that these files are in 'native' *OpenInsight* format (the database platform for BG-BASE). **Opening these files outside of BG-BASE may possibly lead to data corruption.** There are two ways in which you can zip and email your data.

1. If your Durabook laptop has an internet connection and has an email client installed:

- a) Click on the desktop shortcut 'SOS Data'
- b) Choose Edit -> Select All (so that all seven files have been 'selected')
- c) Click on 'Email the Selected Items'

This will automatically open your default email client and attached the files. The files should be sent to mary\_byrne@blm.gov

2. If your Durabook laptop does *\*not\** have an internet connection or an email client installed:

- a) Insert the travel drive into one of the USB ports of the laptop. Choose 'Open folder to view files using Windows Explorer'
- b) Right-click on your desktop folder 'SOS data' and choose 'Copy' (do not choose 'Cut!')
- c) Click on the travel drive window, right-click, and choose 'Paste'. You should now see the 'SOS Data' folder on this drive
- d) Close the travel drive, then locate the travel drive icon at the bottom of the windows taskbar:
- e) Click on this icon and choose 'Safely remove USB storage device' 
- f) Attach the travel drive to a computer that has email access
- g) Using 'My Computer' or 'Explorer', browse to the travel drive and open the 'SOS Data' folder
- h) Choose Edit -> Select All (so that all seven files have been 'selected')
- i) Click on 'Email the Selected Items'

This will automatically open your default email client and attached the files. The files should be sent to mary\_byrne@blm.gov

# Backing Up Data

The DATAWIN folder under your BGBASE6 folder is the main data folder for your BG-BASE application, and as such should be regularly archived. This may be accomplished by copying this folder to your travel drive or to a CD.

## 1) Copying the DATAWIN folder to your travel drive

- a) Insert the travel drive into one of the USB ports of the laptop. Choose 'Open folder to view files using Windows Explorer'
- b) Right-click on your desktop folder 'BG-BASE Datawin' and choose 'Copy' (do not choose 'Cut!')
- c) Click on the travel drive window, right-click, and choose 'Paste'. You should now see the 'BG-BASE Datawin' folder on this drive
- e) Right-click on the folder and re-name it with the current date, such as: "BG-BASE Datawin 8 March 07"
- d) Close the travel drive, then locate the travel drive icon at the bottom of the windows taskbar:
- e) Click on this icon and choose 'Safely remove USB storage device' 

## 2) Copying the DATAWIN folder to a CD

- a) Insert a writeable CD into the CD Drive of the laptop
- b) Choose 'Open folder to view files using Windows Explorer'
- c) Right-click on your desktop folder 'BG-BASE Datawin' and choose 'Copy' (do not choose 'Cut!')
- d) Click on the CD drive, right-click, and choose 'Paste'. You should now see the 'BG-BASE Datawin' folder on this drive with the message 'Files ready to be written to the CD'
- e) Right-click on the folder and re-name it with the current date, such as: "BG-BASE Datawin 8 March 07"
- f) Follow the on-screen directions in the Windows CD burner.

# Software and Data Issues

Contact: Mary Byrne

Phone: 202-452-7767

E-Mail: [Mary\\_Byrne@blm.gov](mailto:Mary_Byrne@blm.gov)

E-mail is preferred, do not hesitate, but please be specific.

## Hardware Issues

Contact: Refer to your warranty information

**It is up to you and your team to promptly address and fix any hardware issues. We anticipate that this machine will be used through the 2010 collection season.**