

Checklists: What they are, what they are for, and how to make them

[Listados de especies: qué son, para qué sirven, como hacerlas]

Términos y sus traducciones Inglés / Español

Checklists = listas

Voucher = record

Dynamic Checklist:

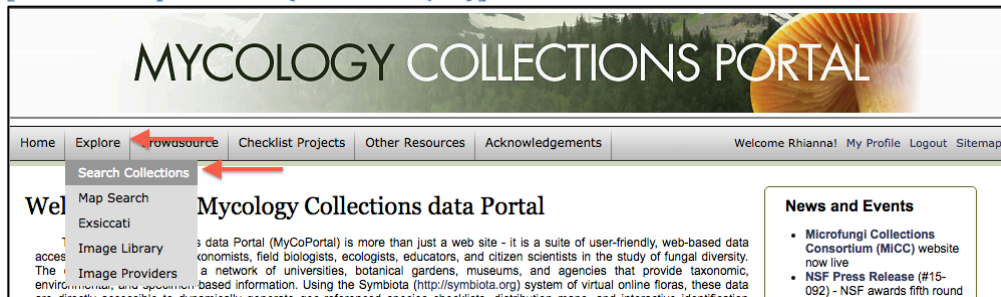
Listas Dinámicas:

This checklist will be the most up to date. It is created when you search for a specific institution, location, collector, time period, etc. The list will contain all vouchered specimens within the search parameters.

[Estas listas son las más actualizadas. Se crean cuando se analizan los siguientes parámetros :nombre de la institución (herbario o colección de hongos), localidad, nombre del colector, fecha de colección o periodo (rango de tiempo), etc. La lista incluirá todos los ejemplares que se encuentran dentro de los parámetros de búsqueda mencionados.]

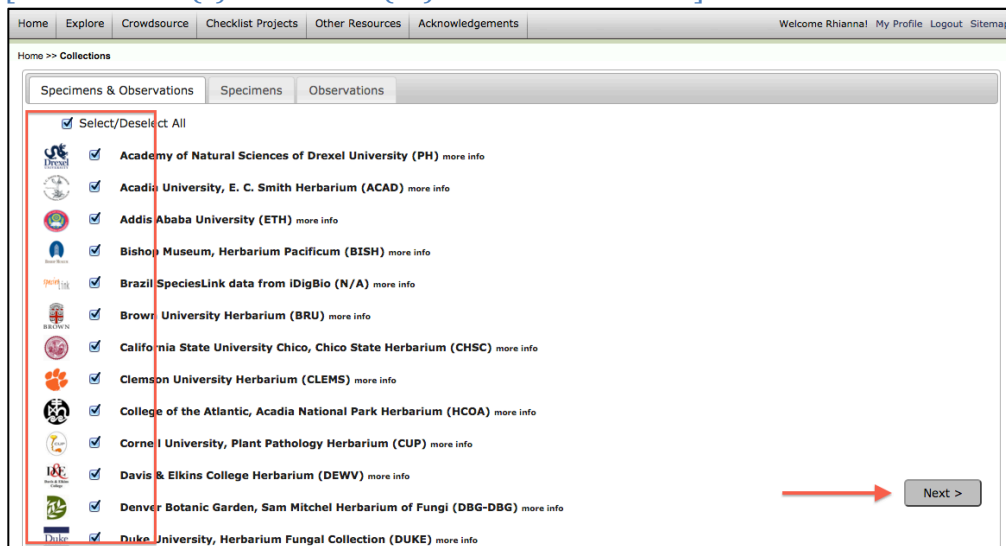
1. “Explore” → “Search Collections”

[Presionar pestañas (flechas rojas)]



2. Select desired institution(s) → “Next”

[Seleccione la(s) institución(es) deseadas → “Next”]



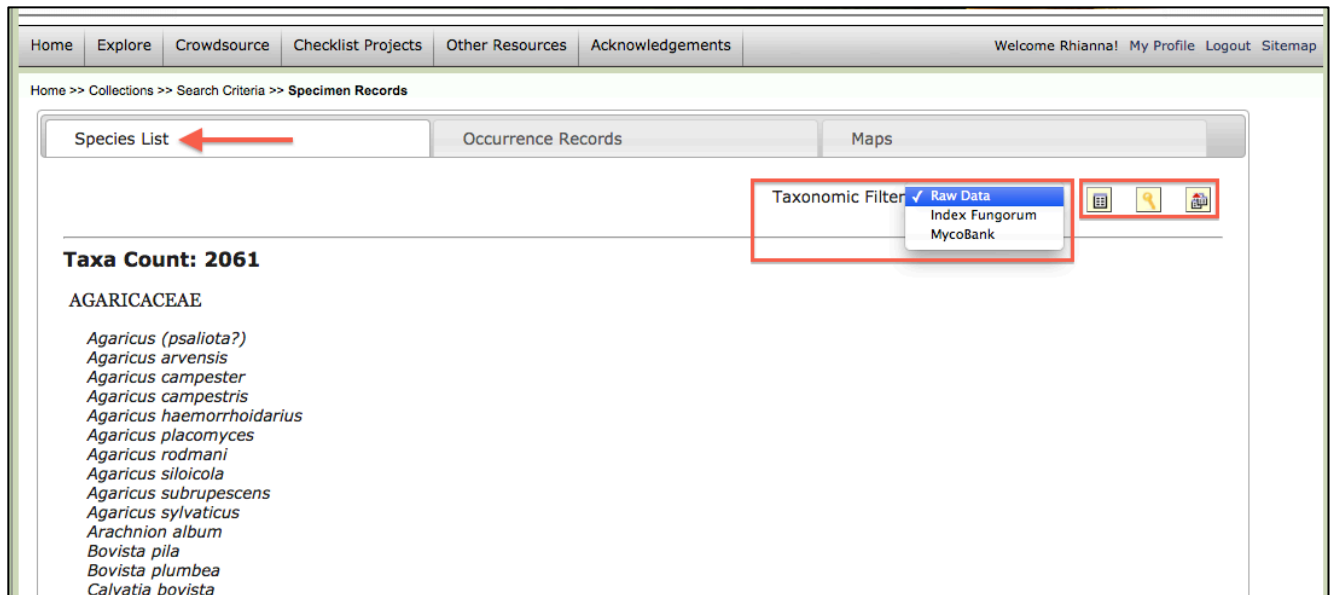
3. Enter search parameters → “Next”

[Introduzca los parámetros de búsqueda “Enter Search Parameters” → “Next”]

4. The resulting list will contain all current vouchered specimens that are within the given search parameters. You can view a list of the species or occurrence records, as well as a map that will show data points for all specimens that have geocoordinates associated with their records.
 [La lista resultante incluirá todos los ejemplares que se encuentren dentro de los parámetros de búsqueda seleccionados. Podrá observar una lista de las especies o récords existentes, así como un mapa que mostrará puntos para cada una de las localidades de cada uno de los especímenes que tienen coordenadas geográficas asociadas a sus registros.]

Species	Specimen Number	Collector	Date	Location
<i>Albugo candida</i> (Pers. ex J.F. Gmel.) Kuntze	PH00300517	A. B. Seymour	29 May 1880	USA, Illinois, Champaign, Urbana
<i>Melampsora medusae</i> Thüm.	PH00317832	M. B. Waite	20 September 1889	USA, Illinois, Champaign, Champaign
<i>Microsphaera ravenelii</i> Berk.	PH00302582	A. B. Seymour	22 September 1879	

5. Selecting the “Species List” tab will bring up the list of species – the Taxonomic Filter allows you to choose how the data will be displayed, the first yellow box will pull up the checklist, the second yellow box brings you to a taxonomic key, and the third yellow box allows you to export the data.
 [Al seleccionar la pestaña “Species List” (Lista de Especies) se mostrará la mencionada lista de especies.– El “Taxonomic Filter” (Filtro Taxonómico) le permitirá elegir el formato en que se mostraran los datos; la primera casilla amarilla subirá el listado de especies, la segunda casilla amarilla le llevará a una clave taxonómica, y la tercera casilla amarilla le permitirá exportar los datos]



Static Checklist:

[Listas Estáticas:]

Static checklists, on the other hand, are created manually and may or may not be backed up by current vouchered specimens on the portal. It can be a useful tool if you want to always have a list readily available at all times (and with a specific URL), if you want species notes that are always available, etc.

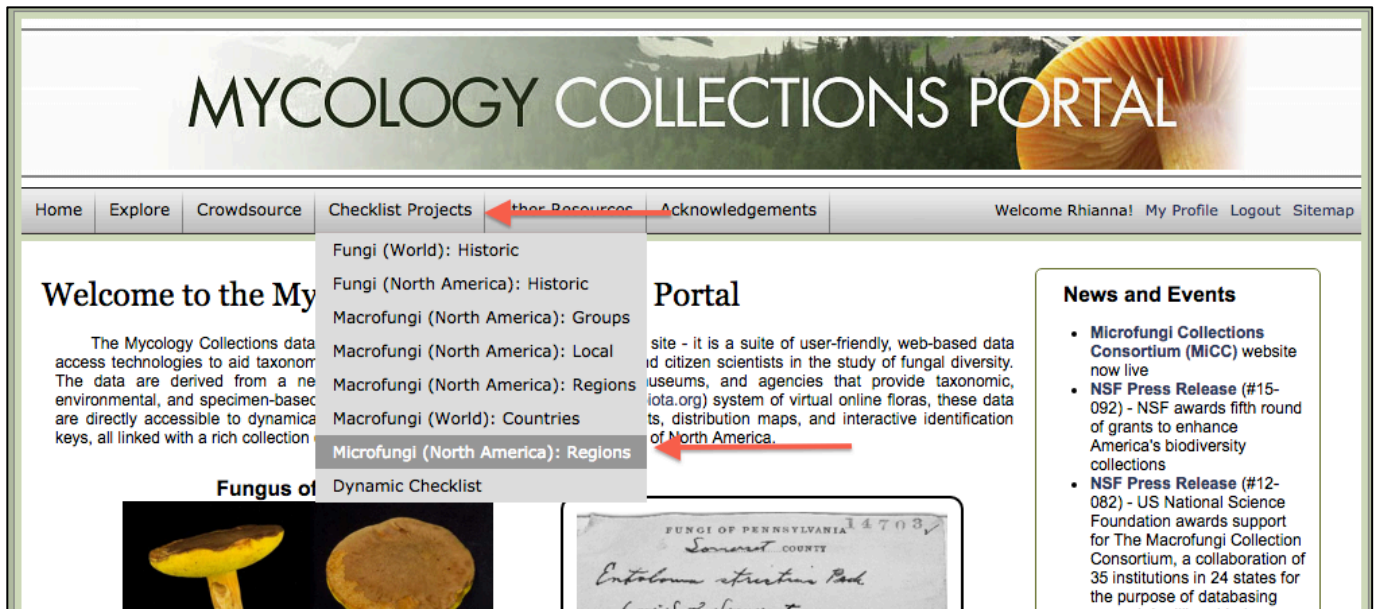
[Las listas estáticas se crean manualmente y pueden o no estar respaldadas por ejemplares certificados en el portal. Pueden ser herramientas útiles si requiere de listas que estén disponibles en todo momento (y con una URL específica), o si desea que las notas de especies estén siempre a su disposición, etc.]

How to view Public Checklists:

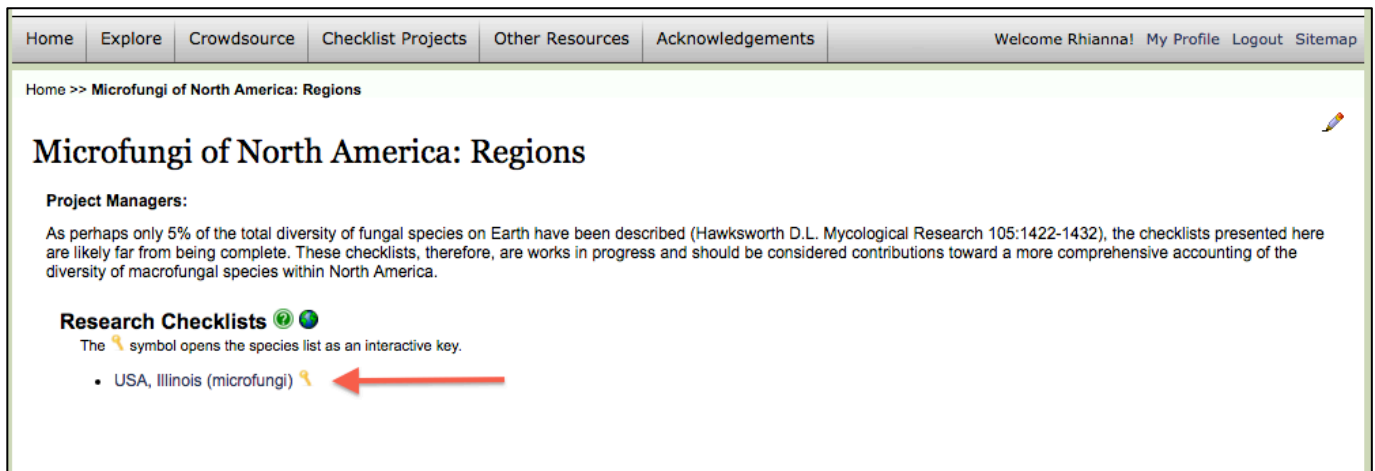
[Como acceder a las Listas Publicadas:]

1. From the Home page, hover over "Checklist Projects," then select the category most closely related to the checklist you are interested in viewing.

[En la página de inicio, coloque el cursor sobre "Checklist Projects," (Proyectos de Listas) y, a continuación, seleccione la categoría más cercana a la lista que le interese ver.]



2. Select the checklist.



3. View the checklist.

[Vaya a la lista (checklist).]

- In the Options box on the right side, you can search the list as well as choose how to view the list:

[En la "Options" box (opciones) que aparecerá en el lado derecho de la pantalla, podrá realizar búsquedas dentro de la lista, así como escoger entre diferentes opciones de cómo ver la lista:]

- Selecting "Notes and Vouchers" will allow you to distinguish which species have been associated with vouchered specimens on MyCoPortal
[Seleccionar la opción "Notes and Vouchers" (Notas y Records) le permitirá distinguir cuales especies están asociadas a muestras que poseen records en el MyCoPortal]
- The search feature allows you to narrow your list down (letting you search by taxon, for example)

[La función “Search” (Búsqueda) le permite restringir la lista al parámetro deseado (por ejemplo, buscar taxón.)]

- iii. “Filter” allows you to choose the taxonomic filter

[La opción “Filter” (Filtro) le permite escoger el filtro taxonómico que desea aplicar.]

- iv. Select “Display as images” and then “Rebuild list” to display the images associated with each species.

[Seleccione “Display as images” (Mostrar como imágenes) y a continuación “Rebuild list” (Rehacer lista) para observar las imágenes asociadas con cada especie.]

- b. By selecting the key icon, you can view the interactive key associated with the specimens in that checklist.

[Al seleccionar el icono con la llave (recuadro rojo), podrá ver una clave interactiva asociada con los especímenes de esa checklist (lista)]

The screenshot shows the INHS MiCC website interface. The main content area displays the checklist for 'USA, Illinois (microfungi)'. On the right side, there is an 'Options' panel with a search bar and a 'Filter' section. The 'Filter' section includes checkboxes for 'Original Checklist', 'Common Names', 'Display as Images', 'Notes & Vouchers', 'Taxon Authors', and 'Show Taxa Alphabetically'. The 'Rebuild List' button is highlighted with a red box.

How to create a Static Checklist:

[Como crear una Static Checklist (Lista Estática):]

1. Log on, “My Profile” → press the green cross by “Checklists assigned to your account”

[Inicie sesión, “My Profile” (Mi Perfil) → presione la cruz verde “Checklists assigned to your account” (Listas asignadas a su cuenta)]

The screenshot shows the 'My Profile' page on the INHS MiCC website. The page has a navigation bar with tabs for 'Species Checklists', 'Specimen Management', and 'User Profile'. The main content area is titled 'Checklists assigned to your account' and lists several checklists. A red box highlights the green cross icon next to the header.

2. Input as much information as you have about the checklist you are creating.

[Introduzca la mayor cantidad de información que tenga acerca de la lista que está creando]

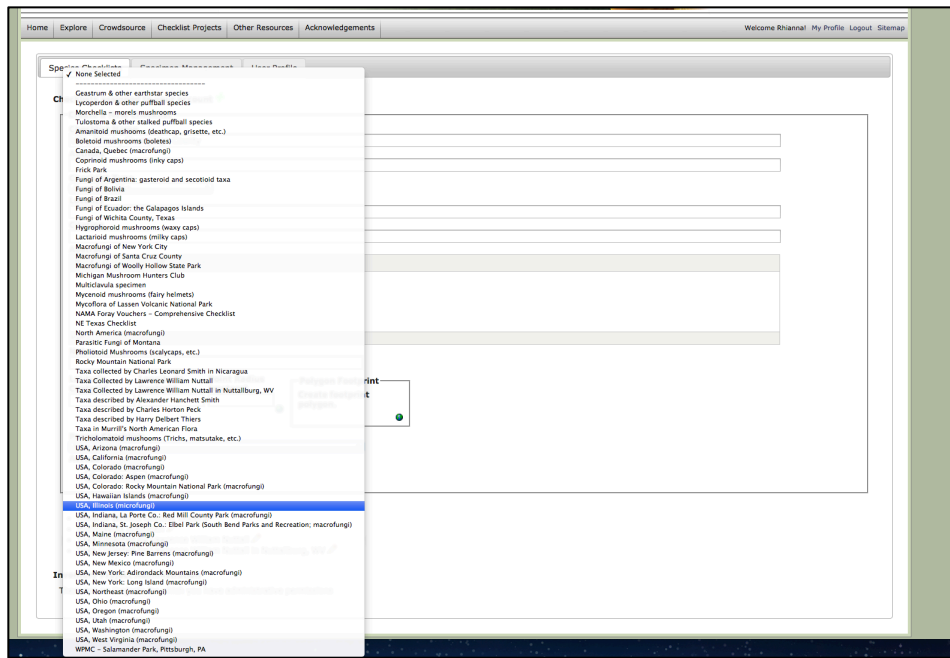
- a. Checklists for specific localities should be named uniformly from least specific (country) to most specific (in this case, Champaign County). It is important to add this extra, broad information about the checklists to give other people an idea of where the location is. For example, if my checklist is “Meadowbrook Park,” only I would know what park that refers to. However, the name “USA, Illinois, Champaign County, Urbana, Meadowbrook Park” is much more explicit.

[Las listas de localidades específicas deben ser denominadas de manera uniforme de los parámetros menos específicos (país) a más específicos (en este caso, el Condado de Champaign). Es importante agregar información general sobre la lista a fin de dar a otras personas una idea certera de dónde está la ubicación. Por ejemplo, si mi lista es de "Meadowbrook Park", sólo yo sabría a qué parque se refiere. Sin embargo, si incluyo la información adicional: "EEUU, Illinois, condado de Champaign, Urbana, Parque de Meadowbrook", es mucho más explícito.]

The screenshot shows the 'Create a New Checklist' form in the INHS MiCC system. The form is titled 'Checklists assigned to your account' and includes a 'Create a New Checklist' button. The 'Checklist Name' field is highlighted with a red box and contains the text 'USA, Illinois, Champaign County'. Other fields include 'Authors', 'Checklist Type' (set to 'General Checklist'), 'Locality', 'Citation', 'Abstract', 'Path', 'Notes', 'Latitude Centroid', 'Longitude Centroid', 'Point Radius (meters)', 'Polygon Footprint', 'Parent Checklist' (set to 'None Selected'), and 'Access' (set to 'Private'). A 'Create Checklist' button is at the bottom.

- b. Most of this information can be edited after the checklist is done – one important exception is “Parent Checklist.” This dropdown list allows you to associate your checklist with existing checklists. In this case, it may be helpful to associate my new Champaign County list with an older list including the whole state of Illinois.

[La mayor parte de esta información puede editarse después de que la lista está hecha. Una de las excepciones más importantes es “Parent Checklist.” (Lista Base). Esta lista desplegable le permite asociar su lista con las listas existentes. En este caso específico, puede ser útil asociar mi nueva lista del condado de Champaign con una lista más antigua que incluya todo el estado de Illinois.]



- c. ["Access" can be set to Private or Public. It's advisable to keep it Private until completed, and then set it to Public if desired]

["Access" (Tipo de Acceso) puede establecerse como Privado o Público. Es aconsejable mantenerlo Privado hasta que esté terminado, y luego configurarlo como Público si se desea]

- d. Press "Create Checklist." Now, whenever you are editing the checklist, you can press the pencil icon with the "A" beside it (upper right hand corner) to edit the checklist description.
[Presione "Create Checklist." (Crear Lista). De ahora en adelante, cuando esté editando la lista, puede presionar el icono de lápiz con la "A" junto a ella (esquina superior derecha) para editar la descripción de la lista.]

Home >> USA, Illinois, Champaign County

USA, Illinois, Champaign County

Authors:

Families: 0
Genera: 0
Species: 0 (species rank)
Total Taxa: 0 (including subsp. and var.)

No Taxa Found

Options

Search:

☐ Common Names
☒ Synonyms

Filter:
Original Checklist:
☐ Common Names
☐ Display as Images
☐ Notes & Vouchers
☐ Taxon Authors
☐ Show Taxa Alphabetically
Rebuild List

Add New Species to Checklist

Taxon:
Acanthostigma occidentale

Habitat:

Abundance:

Notes:

Internal Notes:

Source:

Add Species to List

Batch Upload Spreadsheet

3. Add species to your checklist. This can be done in a couple of different ways. If you want to individually add a specific list of specimen to your checklist:
 - a. Press the pencil icon with “spp” beside it. This will bring up the box that says “Add New Species to Checklist” - input the desired taxon/other information and select “Add Species to List.”

[Presione el icono del lápiz con “spp” al lado. Esta acción abrirá la pestaña “Add New Species to Checklist” (Añada Especies Nuevas a la Lista)- Ingrese el taxón / otra información deseada y seleccione “Add Species to List.” (Añadir especies a la lista)].

Home >> USA, Illinois, Champaign County

USA, Illinois, Champaign County

Authors:

Families: 0
Genera: 0
Species: 0 (species rank)
Total Taxa: 0 (including subsp. and var.)

No Taxa Found

Options

Search:

☐ Common Names
☒ Synonyms

Filter:
Original Checklist:
☐ Common Names
☐ Display as Images
☐ Notes & Vouchers
☐ Taxon Authors
☐ Show Taxa Alphabetically
Rebuild List

Add New Species to Checklist

Taxon:
Acanthostigma occi

Acanthostigma occidentale

Habitat:

Abundance:

Notes:

Internal Notes:

Source:

Add Species to List

Batch Upload Spreadsheet

- b. Now, to check for vouchered specimens, press the pencil with the “V”
 [Ahora, para revisar los “voucher specimens” (Records de los especímenes), presione el lápiz con la “V”]

Home >> USA, Illinois, Champaign County

USA, Illinois, Champaign County Games

Authors:

Families: 1
 Genera: 1
 Species: 1 (species rank)
 Total Taxa: 1 (including subsp. and var.)

TUBEUFIACEAE
Acanthostigma occidentale

Options:

Search:
☐ Common Names
☒ Synonyms

Filter:
☐ Original Checklist
☐ Common Names
☐ Display as Images
☐ Notes & Vouchers
☐ Taxon Authors
☐ Show Taxa Alphabetically

Add New Species to Checklist

Taxon:
 Family Override:
 Habitat:
 Abundance:
 Notes:
 Internal Notes:
 Source:

- c. From here, type your search parameters (in this case, Illinois and Champaign County) and press “Save Search Terms.” This will pull up a list of vouchered specimens of the species in your checklist that match the search criteria. Check the box next to each name and select “Add Vouchers.”

[A continuación, escriba los parámetros de búsqueda (en este caso, los Condados de Illinois y Champaign) y presione “Save Search Terms.” (Guardar los términos de búsqueda). Esto mostrará una lista de ejemplares de la especie en su lista que coinciden con los criterios de búsqueda. Marque la casilla junto a cada nombre y seleccione “Add Vouchers.” (Añadir Records)].

Home >> Return to Checklist >> Checklist Administration

USA, Illinois, Champaign County

Edit Search Statement

To use the voucher administration functions, it is first necessary to define a search terms that will be used to limit occurrence records to those collected within the vicinity of the research area.

Country:
 State: ☒
 County: ☒
 Locality:
 Taxon:
 Collection:
 Collector:

Lat North:
 Lat South:
 Long East:
 Long West:

☐ Include Lat/Long and locality as an “OR” condition
☐ Only include occurrences with coordinates
☐ Exclude cultivated species

Home >> Return to Checklist >> Checklist Administration

USA, Illinois, Champaign County

state: Illinois; county: Champaign

New Vouchers Missing Taxa Voucher Conflicts Reports

Taxa without Vouchers: 1

Display Mode: Occurrences for non-vouchered taxa

Listed below are occurrences that can be batch linked to species within the checklist.

☐	Checklist ID	Collector	Locality
☐	Acanthostigma occidentale	A.B. Seymour 6607 1885-11-03 [no catalog number]	United States; Illinois; Champaign County; Urbana.

[Add name using current taxonomy](#)

[Add Vouchers](#)

- d. Now you are back at your checklist. Under “Options” → “Filter,” press “Notes & Vouchers” then “Rebuild List,” and the checklist will list the specimens and vouchers associated with those specimens.

[Ahora estará de nuevo en su lista (checklist). Bajo “Options → Filter,” (Opciones → Filtro) presione “Notes & Vouchers” (Notas y Records) y luego “Rebuild List,” (Reconstruir lista), y la lista (checklist) mostrará los especímenes y records asociados con esos especímenes.]

Home >> USA, Illinois, Champaign County

USA, Illinois, Champaign County

Authors:

Families: 1
Genera: 1
Species: 1 (species rank)
Total Taxa: 1 (including subsp. and var.)

TUBEUFACEAE
Acanthostigma occidentale
A.B. Seymour 6607 (ILL)

Options

Search:

☐ Common Names
☒ Synonyms

Filter:

☐ Original Checklist
☐ Common Names
☐ Display as Images
☒ Notes & Vouchers
☐ Taxon Authors
☐ Show Taxa Alphabetically

[Rebuild List](#)

Simple Map
Advanced Map

If you want to batch upload a list of species names:

[Si desea subir por lotes una lista de nombres de especies:]

- a. create a .csv file with the columns “sciname,” “family,” “habitat,” “abundance,” and “notes” (sciname is required, the other columns are optional)

[Cree un archivo .csv con las columnas "sciname", "family", "habitat", "abundance" y "notes" (se requiere la columna "sciname", las otras columnas son opcionales)]

	A	B	C	D	E
1	sciname	habitat	notes		
2	Amanita citrina	Mixed hardwood forest	2017 Annual Local Foray		
3	Armillaria mellea	Mixed hardwood forest	2017 Annual Local Foray		
4	Armillaria tabescens	Mixed hardwood forest	2017 Annual Local Foray		
5	Bisporella citrina	Mixed hardwood forest	2017 Annual Local Foray		
6	Chlorociboria aeruginascens	Mixed hardwood forest	2017 Annual Local Foray		
7	Clavaria zollingeri	Mixed hardwood forest	2017 Annual Local Foray		

- b. In the “Add New Species to Checklist” box, select “Batch Upload Spreadsheet”
 [En el cuadro “Add New Species to Checklist” (Agregar nuevas especies a la lista de verificación), seleccione “Batch Upload Spreadsheet”]

- c. From here, select “Choose File,” then “Upload Checklist.”
 [Desde aquí, seleccione “Choose File,” (Elegir archivo), luego “Upload Checklist.” (Cargar lista”)]

If, on the other hand, you are populating your checklist based on certain criteria:
 [Si, por el contrario, está completando su lista (checklist) basándose en ciertos criterios:]

- a. Press the pencil with the “V” and add the search parameters, but now go to the “Missing Taxa” tab. This will show you all of the vouchered specimens that match those search parameters (similar to the Dynamic Checklist).

[Presione el lápiz con la "V" y agregue los parámetros de búsqueda; pero ahora vaya a la pestaña “Missing Taxa”(Taxa Faltantes). Esto le mostrará todos los ejemplares que coinciden con los parámetros de búsqueda (similar a la “Dynamic Checklist “ Lista Dinámica)]

Home >> Return to Checklist >> Checklist Administration

USA, Illinois, Champaign County

state: Illinois; county: Champaign

New Vouchers **Missing Taxa** Voucher Conflicts Reports

Possible Missing Taxa: 1308

Display Mode: **Species List**

Listed below are species name not found in the checklist but are represented by one or more specimens that have a locality matching the above search term.

- Acompsomyces atomaria
- Acompsomyces corticariae
- Acompsomyces pauperulus
- Aecidium aesculi
- Aecidium berberidis
- Aecidium compositarum
- Aecidium compositarum var. eupatori
- Aecidium erigeronatum
- Aecidium fraxini
- Aecidium grossulariae
- Aecidium hepaticae
- Aecidium hibiscatum
- Aecidium oenotherae
- Aecidium physalidis
- Aecidium pustulatum
- Aecidium ranunculacearum
- Aecidium sambuci
- Aecidium solani
- Agaricus arvensis
- Agaricus campestris
- Agaricus campestris
- Agaricus haemorrhoidarius
- Agaricus placomyces

- b. Changing the “Display Mode” from “Species List” to “Batch Linking” will allow you to easily add as many or as few of these vouchered specimens to your checklist. Check the box next to the record, then press “Add Taxa and Vouchers” at the bottom.

[Si cambia el “Display Mode” (Modo de visualización) de “Species List” (Lista de Especies) a “Batch Linking” (Vinculación por lotes), podrá agregar fácilmente a su lista (checklist). el número de ejemplares que desee. Seleccione la casilla que se encuentra al lado del record y, a continuación, pulse “Add Taxa and Vouchers” (Añadir Taxa y muestras) en la parte inferior de la pantalla.]

Home >> Return to Checklist >> Checklist Administration

USA, Illinois, Champaign County

state: Illinois; county: Champaign

New Vouchers **Missing Taxa** Voucher Conflicts Reports

Possible Missing Taxa: 1308

Display Mode: **Batch Linking**

Listed below are specimens identified to a species not found in the checklist. Use the form to add the names and link the vouchers as a batch action. Specimens are displayed in batches of 1000.

☐	Specimen ID	Collector	Locality
☐	Agaricus campestris	J.D. Schoknecht s.n. 1970-10-00 [no catalog number]	United States; Illinois; Champaign; Brownfield Woods, Urbana
☐	Apiocrea chrysosperma	J.D. Schoknecht s.n. 1971-08-04 [no catalog number]	United States; Illinois; Champaign; Brownfield Woods, Urbana
☐	Apiognomonia veneta	G.H. Boewe s.n. 1935-06-11 [no catalog number]	United States; Illinois; Champaign; St. Joseph
☐	Apiognomonia veneta	P.A. Young s.n. 1924-06-02 [no catalog number]	United States; Illinois; Champaign; Urbana
☐	Apiognomonia veneta	J.C. Carter s.n. 1945-05-22 [no catalog number]	United States; Illinois; Champaign; Urbana, Survey Nursery - sprayed trees.
☐	Apiosporina	Mrs. Willis Young	United States; Illinois; Champaign; Bondville

	polymorpha	[no catalog number]	
☐	Xylaria polymorpha	R. K. Benjamin 1950-08-12 [no catalog number]	United States; Illinois; Champaign; Urbana
☒	Zopfiella latipes	J. L. Crane 1974-07-31 [no catalog number]	United States; Illinois; Champaign; Champaign, Pond no 13 NHS

☒ Add name using current taxonomy

Specimen count: 400 View Next 400

4. Once you have added species to the checklist, you can also add notes to those species. By selecting the pencil icon with "SPP," more pencil icons will pop up next to each species name. Press those to bring up a dialogue box in which you can type in notes that will appear next to the vouchered specimen.

[Una vez que haya añadido especies a la lista (checklist), también puede agregar notas a esas especies. Al seleccionar el icono de lápiz con "SPP", más iconos de lápices aparecerán junto al nombre de cada especie. Presione en aquellos nombres que desee, para abrir un cuadro de diálogo en el que puede escribir notas que aparecerán junto al espécimen.]

Home >> USA, Illinois, Champaign County

USA, Illinois, Champaign County

Authors:

Families: 2
 Genera: 2
 Species: 2 (species rank)
 Total Taxa: 2 (including subsp. and var.)

LASIOSPHAERIACEAE

Zopfiella latipes

TUBEUFIACEAE

Acanthostigma occidentale

Options

Search:

☐ Common Names
☒ Synonyms

Filter:
 Original Checklist
☐ Common Names
☐ Display as Images
☐ Notes & Vouchers
☐ Taxon Authors
☐ Show Taxa Alphabetically

Add New Species to Checklist

Taxon:

Zopfiella latipes of USA, Illinois, Champaign County

General Editing	Voucher Admin
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Edit Checklist Information

Habitat:

Abundance:

Notes:

Editor Notes:

Source:

Family

Override:

Rename Taxon / Transfer Vouchers

New Taxon Name:

* Note that vouchers & notes will transfer to new taxon

Delete

5. Repeat as many times until your checklist is complete! Once you are confident in the list, you can request for the MyCoPortal team to add it to one of the Checklist Projects so that it is easily accessible. Without being added to a specific project, you (and other editors of the list) will have access and can share a URL for the list, but other users will not be able to find the checklist by browsing the portal. [Note: you will continue to be able to edit the list as necessary even after it is added to a Checklist Project].

[Repetir tantas veces como sea necesario hasta que su lista (checklist) esté completa. Una vez finalizada, puede solicitar que el equipo de MyCoPortal la agregue a uno de los Proyectos de Listas existentes, a fin de que esta sea fácilmente accesible. Si no desea que su lista sea incluida dentro de un proyecto específico, usted (y otros editores de la lista) tendrán acceso y podrán compartir una URL para dicha lista, pero otros usuarios no podrán acceder a esa lista navegando por el Portal]. [Nota: Usted seguirá teniendo la posibilidad de editar la lista según lo desee, incluso después de que esta sea incluida a uno de los Proyectos de Listas (checklists)].

Home

Explore

Crowdsourcing

Checklist Projects

Other Resources

Acknowledgements

Welcome RhiannonMy ProfileLogoutSitemap

Home >> USA, Illinois, Champaign County

USA, Illinois, Champaign County

Authors:

Families: 2

Genera: 2

Species: 2 (species rank)

Total Taxa: 2 (including subsp. and var.)

LASIOSPHAERIACEAE

Zopfiella latipes
J.L. Crane 1974-07-31 [ILLS]

TUBEUFIACEAE

Acanthostigma occidentale
A.B. Seymour 6607 [ILL]

Options

Search:

☐ Common Names

☒ Synonyms

Filter:

Original Checklist

☐ Common Names

☐ Display as Images

☒ Notes & Vouchers

☐ Taxon Authors

☐ Show Taxa Alphabetically

Rebuild List

Champaign

CAMPUSTOWN

Urbana

University of Illinois at Urbana-Champaign

Simple Map

Advanced Map