

Making Metadata Input Accessible:

*Training Volunteers & Practicum Students
for the Sherwin Carlquist Project*

Presented by:

Samantha Ekberg, Digitization Technician
Botanical Research Institute of Texas Library

For Texas Conference on Digital Libraries, 2026



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The institution, the grant, the botanist, the materials, the volunteers, & the practicum students

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Training structure, how metadata is assigned, how we QC (quality check)

03

Evolution of the Metadata Guidelines

How the guideline document has changed over the 4 versions & why





01

Introduction

The institution, the grant, the botanist, the materials, the volunteers, & the practicum students



The Institution: The Botanical Research Institute of Texas (BRIT)

- Located in Fort Worth, Texas
- The "research arm of the Fort Worth Botanic Garden" and "is an international scientific research and learning center dedicated to conservation and knowledge sharing." – *fwbg.org*
- BRIT Library "houses one of the largest collections of botanical works in the southwestern United States." – *fwbg.org*



The Botanist: Dr. Sherwin J. Carlquist (1930-2021)

- American botanist specializing in **island biogeography** and **wood anatomy**
- Published **8 botanical books**, as well as a book on Japanese festivals, and multiple fine art photography books
- Worked for:
 - CalBG – Plant anatomist
 - Claremont University – Professor
 - UC Santa Barbara – Adjunct professor
 - Santa Barbara BG – Research botanist
- Most active collecting years from 1962–1982
- Focused on **unique and/or isolated regions** all over the world



The Grant:

National Science Foundation - *"Collaborative Research: Advancing the Extended Specimen Network: Curating and Digitizing the Sherwin Carlquist Collection"*

- Awarded to **BRIT & California Botanic Garden (CalBG)** in 2021
- **BRIT: Archival collection** of Sherwin Carlquist
 - ~ 200k objects (~150k color positive film slides, + field notebooks, b&w loose film)
- **CalBG: Biological collection** of Sherwin Carlquist
 - ~20k objects (wood/herbarium/fluid-preserved specimens, microscope slides)
- **Primary goals of the grant were to:**
 - Curate, digitize, publish the collections
 - Link two collections through an Extended Specimen Network (ESN)



U.S. National Science Foundation





The Grant: BRIT's NSF Carlquist Project Staff



Ana Niño
BRIT Librarian
Grant Co-PI



Krishna Shenoy
Project Archivist
Full-time Contractor



Samantha Ekberg
Digitization Technician
Full-time Contractor



Jason Best
BRIT Director of
Biodiversity Informatics

...and dozens of volunteers & practicum students!





The Grant: Volunteers & Practicum Students

Volunteers:

- Come from all backgrounds, and are very important to BRIT & FWBG
- Wide range of computer/technical skills we have and will accommodate
- Volunteers may work in other parts of BRIT, or even the gardens
- Often given tasks outside the grant project
- Within the grant project: Less structured, choice of tasks (don't always do metadata!)

Practicum Students:

- College/university students
- Library science, information science, botanical science, public history
- Library hosts multiple college/university practicum (intern) students every semester
- More structured, with varied tasks, primarily within grant project
- Required to complete 1 metadata box (contains about 50 to 150 color positive slides)






02

Metadata Training, Assigning, & QCing

*Training structure, how metadata is assigned,
how we QC (quality check)*



Timeline of NSF Carlquist Metadata

0.5

BCMI data input during imaging
most basic info on the items

01

Semesterly metadata training
~ 5 hours long, in person, 2-8 trainees

02

Assigned first "saltine" boxes
~50 - 150 records

03

Complete first 20 metadata records
answer questions, catch problems, practice

04

First 20 records QCd & corrected
QC feedback through email

05

Complete rest of the saltine box
questions/assistance in person or q. form

06

Whole box QCd & corrected
may assign another when applicable

Intro to Metadata Training

- **Why in-person?**
 - One-on-one questions, practice records, in depth & detailed
 - We can accommodate those with varying levels of technical/computer skills better in person during training
 - Online training creation would take time to properly build
- Training documentation/resources primarily use **Google Docs, Google Sheets**
 - Ever-changing, multiple viewers/collaborators, generally familiar
- Provide laptops as needed, refreshments, paper & digital metadata guidelines to follow



Training Session Structure:

1. **Setting up** accounts, document/spreadsheet access, introduce resources/websites
2. **How to** use portals, spreadsheets, documents
3. **Go through** Portal to Texas History Editor metadata fields, **field-by-field**
 - a. Following the metadata guidelines, field/qualifier order as they appear in the Portal to Texas History
 - b. Entry is done in a wide variety of ways/orders – training is an overview to introduce & connect fields/qualifiers, concepts, strategies
4. **Assign saltine boxes & work one-on-one with records** for remaining time



BRIT Carlquist materials inventory

File Edit View Insert Format Data Tools Extensions Help

Menus 100% Arial 10

	A	B	C	D	E	F	G	H	I	J	K	L	M
	Original UID BRIT-A-AR003-BankerBox#-Slide#	Rehoused UID BRIT-A-AR003-FlatBox#-SaltineBox#-Slide#	Slide Size	Slide Type	Writing on slide box	Writing on slide mount	Embossed/Stamped Date	Location	Location Keyword(s)	Plant(s) Depicted (Scientific name)	Collector #	RSA URL	Original Image Captured (Optional)
738	BRIT-A-AR003-27-054-09	BRIT-A-AR003-054-06-009	4 x 4 cm.	positive, col.	Wailesia Haloragis Pimelea Trachymene Ptilotus polystachys	none	Aug74H	Australia - Western Australia - Ngaanyatjarraku Shire	Schwerin Mural Crescent				
739	BRIT-A-AR003-27-054-10	BRIT-A-AR003-054-06-010	4 x 4 cm.	positive, col.	July 22 UCU's Wailesia Haloragis Pimelea Trachymene Ptilotus polystachys	none	Aug74H	Australia - Western Australia - Ngaanyatjarraku Shire	Schwerin Mural Crescent				
740	BRIT-A-AR003-27-054-11	BRIT-A-AR003-054-06-011	4 x 4 cm.	positive, col.	July 22 UCU's Wailesia Haloragis Pimelea Trachymene Ptilotus polystachys	none	Aug74H	Australia - Western Australia - Ngaanyatjarraku Shire	Schwerin Mural Crescent				
741													
742					July 23 [crossed out: Gyrotemon] Didymotheca ♂ Dioscorea								

Original UID BRIT-A-AR003-BankerBox#-Slide#	Rehoused UID BRIT-A-AR003-FlatBox#-SaltineBox#-Slide#	Slide Size	Slide Type	Writing on slide box	Writing on slide mount	Embossed/Stamped Date	Location	Location Keyword(s)	Plant(s) Depicted (Scientific name)	Collector #	RSA URL	Original Image Captured (Optional)
BRIT-A-AR003-02-088-13	BRIT-A-AR003-012-03-104	4 x 4 cm.	positive, col.	Vaccin Acacia koa Coprosma BACK: Hawaii: back-up	Coprosma ernodeoides Saddle Rd	none	United States - Hawaii - Hawaii County	Saddle Road [AND] Route 200	Coprosma ernodeoides	none	none	[1951..2012]
BRIT-A-AR003-02-088-14	BRIT-A-AR003-012-03-105	4 x 4 cm.	positive, col.	FRONT: [crossed out: Hualalai pls.] Dubautia scabra Exocarpos Tetramolopium humile Wikstroemia Stenogyne Vaccin Acacia koa Coprosma BACK: Hawaii: back-up	Dubautia scabra SC 2035 Saddle Rd	none	United States - Hawaii - Hawaii County	Saddle Road [AND] Route 200	Dubautia scabra	2035	https://cch2.org/portal/collection/individual/in dex.php?occid=5573593&clid=0	1966-07-22
BRIT-A-AR003-02-088-15	BRIT-A-AR003-012-03-106	4 x 4 cm.	positive, col.	FRONT: [crossed out: Hualalai pls.] Dubautia scabra Exocarpos Tetramolopium humile Wikstroemia Stenogyne Vaccin Acacia koa Coprosma BACK: Hawaii: back-up	Dubautia scabra SC 2035 Saddle Rd	none	United States - Hawaii - Hawaii County	Saddle Road [AND] Route 200	Dubautia scabra	2035	https://cch2.org/portal/collection/individual/in dex.php?occid=5573593&clid=0	1966-07-22
BRIT-A-AR003-02-088-16	BRIT-A-AR003-012-03-107	4 x 4 cm.	positive, col.	FRONT: [crossed out: Hualalai pls.] Dubautia scabra Exocarpos Tetramolopium humile Wikstroemia Stenogyne Vaccin Acacia koa Coprosma BACK: Hawaii: back-up	ferns Saddle Rd.	none	United States - Hawaii - Hawaii County	Saddle Road [AND] Route 200	none	none	none	[1951..2012]

S85

Once you've finished your first 20 records or your entire saltine box, please email sekberg@fwbg.org

metadata editor	assigned date	flat box	saltine box	search input	link to inventory spreadsheet	metadata status	total # of records	# of records to complete	QCer	notes
	3/14/2025 5/23/2025 8/17/2025	8	5	"BRIT-A-AR003-008-05-"	click me!	needs corrections	192	76	Sam	culled and marked as DO NOT DESCRIBE some info might have changed in inventory spreadsheet 10/27/25
	9/18/2025	9	3	"BRIT-A-AR003-009-03-"	click me!	metadata in progress	212	184		no linkages Japan, low priority
ready to cull - low priority	5/18/2026	9	6	"BRIT-A-AR003-009-06-"	click me!	needs culling				Japan plants - BCMI CHECKED
ready to cull - low priority		10	1	"BRIT-A-AR003-010-01-"	click me!	needs culling				Japan plants/other mix
ready to cull - low priority		10	2	"BRIT-A-AR003-010-02-"	click me!	needs culling				Japan plants/other mix
ready to cull - low priority	5/18/2026	10	3	"BRIT-A-AR003-010-03-"	click me!	needs culling				Japan plants - BCMI CHECKED
	9/23/2025	10	5	"BRIT-A-AR003-010-05-"	click me!	metadata in progress	206	193		Japan mostly other
ready to cull - low priority		10	6	"BRIT-A-AR003-010-06-"	click me!	needs culling				Japan plants/other mix
	7/11/2025 12/22/2025	11	1	"BRIT-A-AR003-011-01-"	click me!	metadata in progress	187	136	Sam	culled and marked as DO NOT DESCRIBE Hawaii linkages
	3/14/2025 9/9/2025	11	2	"BRIT-A-AR003-011-02-"	click me!	metadata in progress	167	151	Sam	culled and marked as DO NOT DESCRIBE Hawaii linkages
	3/14/2025 10/28/2025	11	4	"BRIT-A-AR003-011-04-"	click me!	metadata in progress	224	200	Sam	culled and marked as DO NOT DESCRIBE Hawaii linkages
	10/20/2025 01/31/2026	12	1	"BRIT-A-AR003-012-01-"	click me!	metadata in progress	202	169	Sam	Hawaii linkages
	11/5/2025	12	2	"BRIT-A-AR003-012-02-"	click me!	metadata in progress	166	133	Sam	Hawaii linkages
	1/12/2026	12	5	"BRIT-A-AR003-012-05-"	click me!	metadata in progress	179	152	Sam	Hawaii linkages
ready to cull - low priority	5/18/2026	12	6	"BRIT-A-AR003-012-06-"	click me!	needs culling				Hawaii linkages - BCMI CHECKED
	1/14/2026	14	1	"BRIT-A-AR003-014-01-"	click me!	ready for QC	181	109	Sam	Australia linkages
	4/1/2026	14	3	"BRIT-A-AR003-014-03-"	click me!	metadata in progress	178	111	Sam	Australia linkages
	5/18/2026	14	4	"BRIT-A-AR003-014-04-"	click me!	intro 20 in progress	68	68	Sam	Australia linkages - BCMI CHECKED
	5/18/2026	14	5	"BRIT-A-AR003-014-05-"	click me!	intro 20 needs corrections	80	80	Sam	Australia linkages - BCMI CHECKED
	5/18/2026	14	6	"BRIT-A-AR003-014-06-"	click me!	intro 20 in progress	87	87	Sam	Australia linkages - BCMI CHECKED
	5/18/2026	15	1	"BRIT-A-AR003-015-01-"	click me!	intro 20 in progress	187	82	Sam	Australia linkages - BCMI CHECKED
	5/18/2026	15	2	"BRIT-A-AR003-015-02-"	click me!	intro 20 in progress	177	88	Sam	Australia linkages - BCMI CHECKED
ready to CULL - coll. # priority	5/18/2026	15	3	"BRIT-A-AR003-015-03-"	click me!	needs culling	178			Australia linkages
ready to prep - coll. # priority	5/18/2026	15	4	"BRIT-A-AR003-015-04-"	click me!	needs prepping	66	66		Australia linkages

Metadata QC (Quality Checking)

- Through email, to one primary QCer
- First 20 records are all checked one-by-one, full box has ~30% checked (unless more needed)
- Email links directly to relevant sections in guidelines, cells in spreadsheets, etc.
- When a correction is listed for a record, a note is given indicating **this correction should be applied to all other records where applicable**
- Sometimes corrections are given in multiple rounds to prevent overwhelm/confusion
- Correction feedback may be more detailed depending on the metadata worker
- Encourage worker to print correction email if they want to do so

"BRIT-A-AR003-011-05-9" full QC check 1

1. BRIT-A-AR003-011-05-073

a. Title:

i. Missing country (United States) at the end of the title.

1. **Correct this and any other records missing full location info as applicable.**

ii. Make "View" lowercase in the title.

1. **Correct this and any other record with incorrect title capitalization as applicable.**

b. Date (creation) / Coverage (date):

i. On the BCMI, I think we can make the date information for the slide box this image is in ([Slide Box 48](#)) I would be comfortable labeling these as [1950..1958] based on the info we have on some. I have gone ahead and added his range to [BCMI Column M under this slide box](#), so **if you could change the date information on the images in this slide box** that would be great!

2. BRIT-A-AR003-011-05-099

a. Title:

i. Correct/rework title to format similar to others, something more like [Aerial view of coastline on Hawaii Island, United States]

1. **Check that no other titles have similar issue**

3. BRIT-A-AR003-011-05-115

a. Subject (location keywords):

i. It looks like some of our old format of doing alternative versions of locations on the BCMI didn't get corrected (with the parenthesis). I corrected Column I location keywords for [11-05-113 to 11-05-115](#), so **those will all have to be corrected as applicable in the Portal** - taking off the parenthesis from "Big Island" and moving it to a separate location keyword entry.

ii. **If you noticed any more in the saltine box on BCMI Column I that look like this, I would appreciate you letting me know so I can correct them!**

4. BRIT-A-AR003-011-05-018

a. Title:

i. Add a little more to this title to make it unique - could be something like [Smoke and dark rock cliffs at Halema'uma'u Crater, United States]

1. **Correct any other similar short titles as applicable.**

5. BRIT-A-AR003-011-05-090

a. Description (physical):

i. You corrected some from what I saw clicking through, but this slide size was not changed to "35 mm." under physical description.

1. **Correct this record, and look through any other 35 mm./rectangular images and make sure they were changed as well.**




03

Evolution of the Metadata Guidelines

*How the guideline document has
changed over the 4 versions & why*



Intro to the Metadata Guidelines

- Created with **Google Docs**
 - Currently has **4 versions** – each version receiving dozens of minor edits
 - **Version 1** – early 2024
 - **Version 2** – mid 2024
 - **Version 3** – late 2024
 - **Version 4 (current)** – started in late 2025, deployed in January 2026
 - New version created **when major content/formatting changes are needed**
 - Changes/updates in field/qualifier guidance
 - Improved formatting, structure to increase ease of use/comprehension for users
 - Improvements primarily based on pain points seen in the QC process over several workers, and feedback
- 

Metadata Guidelines v.4

File Edit View Tools Extensions Help

Document tabs

- Getting Started
- Sherwin Carlquist Collect...
- 1. Getting Started
 - 1.1. Accessing to the Po...
 - 1.2. Accessing your met...
 - 1.3. Before you start en...
 - 1.4. Resources you nee...
 - 1.5. Communication pro...
- Using the Portals/Spreadsh...
- Metadata Fields
- Quick Reference

Sherwin Carlquist Collection Metadata Guidelines for Slides

Training - Getting Started

Use these guidelines to enter information (metadata) about Carlquist's slides into the [Portal to Texas History](#) (PTH) database. **The information you enter will be visible to the public.** The goal is to have **consistent, discoverable, and accurate records.** We are entering metadata to **describe the archival objects and Carlquist's observations at the time he gathered the information.** Our goal is not to translate the information to current day standards and nomenclature.

The guidelines will cover:

- [Getting Started](#)
- [Using the CCH2 Portal](#)
- [Using the UNT Portal to Texas History Editor Portal](#)
- [Managing the BRIT Carlquist Inventory Spreadsheet](#)
- [Metadata Fields Overview](#)
- [Editing Metadata Fields](#)

1. Getting Started


1.1. Accessing to the Portal to Texas History Metadata Editor:

- Should be completed before training.**
- If not:


Document tabs

- Getting Started
- Using the Portals/Spreadsh...
- Metadata Fields**
- Sherwin Carlquist Collect...
- 5. Metadata Fields Overvi...
- 6. Editing Metadata Fields
 - 6.1. Title [field]
 - 6.1.1. Main Title [qualif...
 - Main Title Overview:
 - Main Title Formulas:
 - Botanical Titles:
 - Unidentified Plants
 - Identified Plants
 - Non-Botanical Titles:

formulaic
 a location at the end unless it is not available (two location levels when available)
 modern version of the location name in the title, even if Carlquist uses a different version
 as in **uppercase first letter of the first word and lowercase for the rest (besides proper nouns)**
 square brackets]
ical images:
 enough content variation even with similar images, adding in one or two descriptive words is needed. If the
 re extremely similar, copying titles is permitted if necessary (this is rare).
 e scientific name of the subject of the image is present (such as an animal, shell, etc.), follow the "botanical"
 e. ([see below](#))
es/Botanical images:
 the **scientific name** in titles - common name (in parenthesis) will be included in the description.
 arieties' and subspecies' full names in the titles. Spell and format as [ipni.org](#) does.
 bspecies: subsp.
 riety: var.
 h be repetitive.

 **Sam Ekberg**
6:11PM May 26

delete BRIT identifier number from the title before submitting for QC

 **Sam Ekberg**
1:02PM May 19

link to scientific name section

Document tabs

- Getting Started
- Using the Portals/Spr...
- Sherwin Carlquist Collec
- 2. Using the CCH2 Portal:

3.5. The

Copy link

Hide outline

Noteworthy Changes Between Versions

Version 1 → Version 2

- **Simplifying** text & unnecessary examples
- **Adding** more necessary examples
- More consistent **formatting**
- More **detail/clarity** in some sections
- Updating **changed/incorrect** field/qualifier guidance

Version 2 → Version 3

- **More variation in text** hierarchy/multilevel lists, bolding, underlining, font sizes
- More **links** to other sections
- More **image examples/updating images**
- Added more **detail/clarifying** sections – section intros
- **Deleted/added** sections
- **Restructuring** within field/qualifier sections
- Added **tables**
- **Emphasis** on important/often missed concepts

Version 3 → Version 4

- **Utilizing tabs** to separate training-only sections from main "Metadata Fields" tab
- Reducing **page margins**
- Changing **font sizes**
- Better **section separation/headers**
- **Deleting/combining/restructuring** sections
- **Adding sections/more info** to sections
- Adding **images**
- Reducing image sizes/making **image sizing** more consistent
- Added **color coding**
- Added **more tables**

PTH Sidebar

2. Features of UNT Portal to Texas History Metadata Portal

2.1 Filters

2.1.1 Collection - Sherwin J. Carlquist Collection

Available Filters	
Collection	
Sherwin J. Carlquist Collection	5,183
Rescuing Texas History, 2022	128
Texas History Collection	3
Rescuing Texas History, 2015	3

2.1.3 My Edits - you can view the records that you have worked on

My Edits	
Records I've Edited	17
Records I've Not Edited	428

[Find Other Editors.](#)

2.1.2 Resource Type - slides are categorized as photographs

Resource Type	
Photograph	5,181
Book	3
Text	3

V
2

2. Features of UNT Portal to Texas History Metadata Portal

2.1. Filters on the sidebar

Applied Filters	
Collection : Sherwin J. Carlquist Collection	
Resource Type	
Photograph	25,673
Text	6,995
Book	26
Visibility	
Hidden from Public	24,076
Visible to Public	10,624
Date Validity	
Valid Dates	34,689
Invalid Dates	3
My Edits	
Records I've Edited	116
Records I've Not Edited	24,588

The official collection name

Slides are categorized under "Photograph"

You can ignore these two sections

View the records that you have worked on

[Find Other Editors.](#)

V
3

3. Using the UNT Portal to Texas History Editor Portal

3.1. Searching/accessing your assigned saltine box [in the PTH]

- Click the link in [Metadata Assignments](#) Column I of your assigned box OR
- Search through the [PTH editor](#) directly:
 - Copy-paste the content in Metadata Assignments Column E exactly to the PTH search box. (include the quotations)

3.2. Sidebar filters

You should have the **Collection** [[Sherwin J. Carlquist Collection](#)] and **Resource Type** [[Photograph](#)] always filtered. The others can be used as needed

V
4

Field/Qualifier Overview

3. Fixed and Blank Metadata Fields

Fixed Fields have been pre-filled and do not need to be edited.

Blank fields do not apply to the slide collection, are not filled, and remain blank.

- **Creator** - Carlquist, Sherwin John, 1930-2021
- **Contributor** - Blank
- **Publisher** - Blank
- **Primary Source** - True
- **Resource Type** - Photograph
- **Coverage Time Period** - Modern Times (mod-tim)
- **Source** - Blank
- **Citation** - Sherwin J. Carlquist Collection, Botanical Research Institute of Texas Library, Fort Worth Botanic Garden.
- **Collection** - Sherwin J. Carlquist Collection
- **Institution** - Botanical Research Institute of Texas
- **Format** - Image
- **Identifier Accession/Local No.** - BRIT-A-AR003-[Flat Box #]-[Saltine Box #]-[Image #]
- **Degree** - Blank
- **Meta** - Portal metadata

V3

4. Metadata Fields to Complete

The below fields need metadata input in the **Portal to Texas History**.

You will obtain much of this information from the [BRIT Carlquist materials inventory spreadsheet](#), in addition to searching through [field notebook transcriptions](#), the [CCH2 database](#), and conducting independent research.

- | | |
|-----------------------------------|---|
| 4.1 Title Main | 4.6 Coverage Place |
| 4.1 Title Series* | 4.6 Coverage Historic Name* |
| 4.2 Date | 4.7 Relation* |
| 4.3 Language | 4.8 Identifier* |
| 4.4 Description | 4.9 Rights* |
| 4.5 Subject | 4.10 Note |
| 4.6 Coverage Date | |

*Fields marked with an asterisk are **only filled out when applicable**.

Fields highlighted in yellow will come from the BRIT Carlquist materials inventory.

Note: depending on how much information is provided, the Date field may take a couple of extra steps to look into.

5. Metadata Fields Overview

- **Blue highlighted** = Section title
- **Green highlighted** = Metadata worker fills out every time
- **Yellow highlighted** = Metadata worker fills out when applicable
- **Blue highlighted** = Metadata worker edits/changes when applicable
- **Red highlighted** = Pre-filled or will be kept blank
- *Added asterisks* = Is a direct copy-paste from the BCMI

- | | | |
|-----------------------------------|--|--|
| 1. Title | b. [metadata-worker-added subject keywords] | a. [content pre-filled] |
| a. Main Title | | |
| b. [added drop-down] Series Title | | |
| 2. Creator | c. *[metadata-worker-added location keywords]* | 15. Institution |
| a. [content pre-filled] | d. Named Person / Scientific Name | a. [content pre-filled] |
| 3. Contributor | | 16. Rights |
| a. [content left blank] | | a. Rights License |
| 4. Publisher | 9. Primary Source | 17. Resource Type |
| a. [content left blank] | a. [named copyright holder] | a. [content pre-filled] |
| 5. Date | 10. Coverage | 18. Format |
| a. Creation | a. Coverage Date | a. [content pre-filled] |
| 6. Language | b. *Place Name* | 19. Identifier |
| a. [drop-down language selection] | c. *Historic Place Name* | a. Accession or Local Control No. [content pre-filled] |
| 7. Description | d. Time Period: [content pre-filled] | b. [added drop-down] Other |
| a. Content Description | 11. Source | 20. Degree |
| b. Physical Description | a. [content left blank] | a. [content left blank] |
| 8. Subject | 12. Citation | 21. Note |
| a. [pre-filled subject fields] | a. [content pre-filled] | a. *Display Note* |
| | 13. Relation | 22. Meta |
| | a. [drop-down] References | a. [content pre-filled] |
| | 14. Collection | |

V4

Title Location

4.1 Title - A name given to the resource.

4.1.1. Main Title Qualifier - It is the first thing people see about the item.

- Titles are concise, sentence case, [bounded with square brackets], and contain no punctuation or abbreviations. Since there is no formal title for each slide and we are creating the title, PTH requires those titles to be contained with brackets.
- Be sure to erase the BRIT file name following the bracket title.
- **Avoid starting titles with "Photo of" or "Photograph of" or "Image of". These phrases are used in the description.**
- Include proper names if confirmed, such as names of temples, botanic gardens, national parks, mountain summits. Include City or State information if confirmed, but then also include country name. Do not include names of prefectures, provinces, regions, or other geographic designations that are not commonly known. Try not to overload the Title with location names. Point of interest name, plus city, plus island, plus country might be too much. Consider just using points of interest and country.

V₁

4.1 Title - A name given to the resource.

[4.1.1. Main Title Qualifier - It is the first thing people see about the item. Since there is no formal title for each slide, we will create one.

Titles:

- are concise and formulaic for botanical images:
 - **unidentified plant or scientific name - scale of photograph - location**
 - sentence case,
 - [bounded with square brackets],
 - contain no punctuation or abbreviations
 - If you have near identical images, repeat the title. Repeat the title for events and cultural activities, too.
- **Location:**
 - a. **Include two levels of location information when available.** Don't include location qualifiers, such as "Island", "Municipality", etc., unless part of an official part of a country name.
 - i. **First:** smallest level of the location string OR location keyword (use location keyword if available over smallest level of location string)
 - ii. **Second:** largest level of the location string/country
 - b. **Example:** Tamadaba National Park, Canary Islands (Location Keyword, Country)
 - c. **Example:** Mayaguez, Puerto Rico (Smallest available level of location string, Country)
 - d. **Example:** Japan (Country – the country was the only known piece of info available for location)
- Use the modern or current name. If Carlquist uses a historic name, apply Historic Place Name qualifier when it relates to locations and use Subject Keyword when it relates to points of interest.

Example: <https://texashistory.unt.edu/ark:/67531/metaph1646594/>

V₂

V₄

Title Location:

Title Location basics:

- Consult **Column H** (Location) and **Column I** (Location Keyword[s]) in the Inventory Spreadsheet
- Don't include location qualifiers, such as "Island", "Municipality", "County", etc. (unless instructed to)
- Will be added to the end of a title (see [Title Formulas](#)). Include two levels of location information when available.
- **For photos with [unidentified]** in the Location column (Column H) on the inventory spreadsheet, insert "from an unidentified location" at the end of the title.

Determining Location Levels:

- Include **two levels of location information** in the title when available.
 - **First:**
 - location keyword (single one available or the **bolded** location keyword) **OR**
 - smallest location within location string (only when no location keywords available/a location string section is bolded instead)
 - **Location Keywords are prioritized**
 - **Second:**
 - largest level of the location string, most often country
 - Exceptions (determined so far in the project):
 - Canary Islands
 - Note: This is just for clarity, as if you label something as "Spain" instead of "Canary Islands" people might assume it's mainland Spain, not the islands which themselves are Carlquist's focus.

Examples of Title Locations:

Example	Title Location Result		
<table border="1"> <tr> <td>Japan - Kyoto Urban Prefecture - Kyoto Municipality - Kyoto</td> <td>Katsura Imperial Villa [AND] Katsura Ekyū</td> </tr> </table>	Japan - Kyoto Urban Prefecture - Kyoto Municipality - Kyoto	Katsura Imperial Villa [AND] Katsura Ekyū	Katsura Imperial Villa, Japan
Japan - Kyoto Urban Prefecture - Kyoto Municipality - Kyoto	Katsura Imperial Villa [AND] Katsura Ekyū		
<table border="1"> <tr> <td>United States - California</td> <td>unidentified</td> </tr> </table>	United States - California	unidentified	California, United States
United States - California	unidentified		

<table border="1"> <tr> <td>Japan</td> <td>unidentified</td> </tr> </table>	Japan	unidentified	<p>Japan</p> <ul style="list-style-type: none"> • Only country is permitted if no other information is provided.
Japan	unidentified		
<table border="1"> <tr> <td>United States - Hawaii - Honolulu County</td> <td>Bernice Pauahi Bishop Museum - Natural and Cultural History [AND] Oahu Island</td> </tr> </table>	United States - Hawaii - Honolulu County	Bernice Pauahi Bishop Museum - Natural and Cultural History [AND] Oahu Island	<p>Bernice Pauahi Bishop Museum, United States</p> <ul style="list-style-type: none"> • Longer names may be shortened for titles. • Full location keyword will still be input as a location keyword under Subject.
United States - Hawaii - Honolulu County	Bernice Pauahi Bishop Museum - Natural and Cultural History [AND] Oahu Island		
<table border="1"> <tr> <td>United States - Hawaii - Hawaii County - Kahuku</td> <td>Hawaii Island [AND] Big Island</td> </tr> </table>	United States - Hawaii - Hawaii County - Kahuku	Hawaii Island [AND] Big Island	<p>Kahuku, United States</p> <ul style="list-style-type: none"> • In this case, a location in the location string is preferred, indicated by the bolded word.
United States - Hawaii - Hawaii County - Kahuku	Hawaii Island [AND] Big Island		
<table border="1"> <tr> <td>Singapore - Central Singapore Development Council - Bukit Timah Subzone</td> <td>none</td> </tr> </table>	Singapore - Central Singapore Development Council - Bukit Timah Subzone	none	<p>Bukit Timah, Singapore</p> <ul style="list-style-type: none"> • "Subzone" can be taken out.
Singapore - Central Singapore Development Council - Bukit Timah Subzone	none		
<table border="1"> <tr> <td>Papua New Guinea - Morobe Province HPN: Territory of New Guinea</td> <td>Sarawaket Range [AND] Saruwaket Range</td> </tr> </table>	Papua New Guinea - Morobe Province HPN: Territory of New Guinea	Sarawaket Range [AND] Saruwaket Range	<p>Sarawaket Range, Papua New Guinea</p> <ul style="list-style-type: none"> • Use modern names in titles (the one in the location string). For more on HPN, see here.
Papua New Guinea - Morobe Province HPN: Territory of New Guinea	Sarawaket Range [AND] Saruwaket Range		
<table border="1"> <tr> <td>United States - California - Los Angeles County - Claremont</td> <td>Rancho Santa Ana Botanic Garden [AND] RSA [AND] California Botanic Garden</td> </tr> </table>	United States - California - Los Angeles County - Claremont	Rancho Santa Ana Botanic Garden [AND] RSA [AND] California Botanic Garden	<p>California Botanic Garden, United States</p> <ul style="list-style-type: none"> • Use modern names in titles. (Rancho Santa Ana Botanic Garden is the previous name for California Botanic Garden)
United States - California - Los Angeles County - Claremont	Rancho Santa Ana Botanic Garden [AND] RSA [AND] California Botanic Garden		

Scientific Name

V1

4.5.7 Scientific Name Qualifier

Include *Scientific Name* qualifier (with correct spelling) of the plant depicted in the image. Use the name given by Carlquist. At a minimum include Genus or Family for plants and animals. Make sure the Scientific Name Qualifier is the last qualifier in the Subject Field.

6.5.5. Scientific Name [qualifier]

→ Required only when applicable

Scientific Name basics:

- Scientific names are entered under the Subject field, with the **drop-down qualifier of Scientific Name**.
- Genus (first word) is capitalized, species (second word) is lowercase.**
 - Sometimes you may have the genus, but not the species.
 - Rarely we will not have either and will use the Family name (the more general taxonomic level above genus), capitalizing the first letter of the Family name.

• Variants & subspecies:

- Could be provided on the slide mount/slide box, in the field notebook, or through your research.
 - If a variant or subspecies addition is provided in CCH2, but not the slide mount/box or field notebook, default to what is provided with the slide mount/box/field notebook.
- Write out whole name in the Scientific Name qualifier, including "subspecies" and "variant" additions.
 - Format:
 - Variants: [Genus] [species] var. [variant]
 - Subspecies: [Genus] [species] subsp. [subspecies]
 - Be sure to use the scientific name, with the correctly formatted variant/subspecies additions, in the title/description.
 - See: [Title ffield](#) / [Content Description \[qualifier\]](#)

- Scientific name will be input whether it is provided in the BCMI or was determined through your research.**
- We will only input one scientific name for a plant, no synonyms. Prioritize the name used by Carlquist, unless it's not an approved name. (see Scenarios below)
- Searching a name through Google Images can sometimes be helpful - but for similar plants, more detailed images, specific species - using [iNaturalist](#) can work well. Reference only "Research Grade" labeled records.

Scenario:	Portal Input:
Scientific name is on slide box/slide mount AND Scientific name is confirmed to match the image of the plant	Put name provided in the Scientific Name qualifier
Carlquist collector number is on slide box/slide mount	Put name provided in the Scientific Name qualifier

V4

WITH Scientific name AND Field notebook/CCH2 record collector number/scientific name is confirmed to match the image of the plant	
Scientific name is on slide box/slide mount AND Scientific name is confirmed to match the image of the plant BUT Scientific name is crossed out on slide box/slide mount	Put name provided (even if crossed out) in the Scientific Name qualifier
Scientific name is on slide box/slide mount AND Scientific name confirmed to match the image of the plant BUT Scientific name is misspelled on slide box/slide mount	Put correctly spelled version of the plant name in the Scientific Name qualifier
Carlquist collector number is on slide box/mount WITHOUT Scientific name	Look up the collector number in the field notebook (first) or CCH2 (if there's no field notebook with it) and put the name provided in the Scientific Name qualifier
No scientific name or collector number provided on slide box/slide mount AND You determine the scientific name through research	Put the most common/accepted version of the scientific name in the Scientific Name qualifier
Collector number on slide box/slide mount DOES NOT MATCH Collector number in field notebook BUT The scientific name, approximate date, and approximate location match between the slide box/slide mount and field notebook	Follow BCMI metadata note instructions OR Submit a Question Form request
Scientific name on slide mount/slide box/field notebook/determined through research	Follow BCMI metadata note instructions OR
DOES NOT MATCH Scientific name provided in CCH2 BUT The collector number, approximate date, and approximate location match between the slide box/slide mount/field notebook/research and CCH2	Submit a Question Form request
Any other unlisted/uncertain scenario	Follow BCMI metadata note instructions OR Submit a Question Form request



NSF Carlquist Exhibitions



<https://fwbg.org/full-calendar/exhibition-expeditions-through-the-lens-botanical-photographs-of-sherwin-carlquist/>

Expeditions Through the Lens:
Botanical Photographs of
Sherwin Carlquist


Botanical Research Institute of Texas
(BRIT) – Fort Worth, Texas
In-person exhibit
June 1st – September 30th (weekdays)



<https://storymaps.arcgis.com/stories/75f901d150b24d21a6ce0b6cfaa7913>

Sincerely, Sherwin
The life and legacy of
Dr. Sherwin Carlquist,
a visionary botanist

California Botanic Garden (CalBG) –
Claremont, California
Online exhibit



Thanks!

Contact Samantha Ekberg at:

Email: sekberg@fwbg.org

LinkedIn:



<https://www.linkedin.com/in/samantha-e-479873178>

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<https://fwbg.org/full-calendar/exhibition-expeditions-through-the-lens-botanical-photography-of-sherwin-carlquist/>

BRIT
In-person
exhibit



<https://storymaps.arcgis.com/stories/75f901d150b24d21a6ce0b6cfaa7913>

CalBG
Online
exhibit



<https://texashistory.unt.edu/>

Carlquist
collection on
The Portal to
Texas History