How to Update Determinations

Determinations can be updated using 4 methods:

a) During a **new census upload**
b) During **voucher import**
c) Updated **manually** one by one through the ForestPlots.net interface (View Tree/View Liana screen: Tree Details tab) or
d) Using the **'Update Determinations'** Data Import feature.

This checklist provides information on how to update determinations using the 'Update Determinations' data import feature.

1. Log in to ForestPlots.net and navigate to the plot in MyPlots.
2. Download a template file by selecting the green data icon in 'Data Import' – 'Update Determinations'.
3. Fill in the columns of the template file. Further information for these can be found in the worksheet 'Definitions'.
   - We recommend downloading a **'Taxon Manager Plot Dump'** (found in 'Data Export') to obtain the current data from ForestPlots required for the file.
   - Note: Use the **Family / Species / Subspecies / Variety columns** (and NOT the Recommended Family / Recommended Species / Recommended Subspecies / Recommended Variety columns) from the **'Taxon Manager Plot Dump'** as the **Current Family / Current Full Species Name / Current Subspecies Name / Current Variety** in the Update Determinations template.
   - Ensure that any Voucher Codes are **already stored** in ForestPlots.net and are '**collected'** from the specified stem.
     - If the voucher hasn't been uploaded yet, you should use 'Import Vouchers' instead (not 'Update Determinations'), entering the new determination in the 'Import Vouchers' template file.
     - There is no need to include all of the 'same as' trees (Voucher Collected = No) in the Upload file. As long as you include the 'Collected' treeid and its Voucher Code, you will have the option to auto update the determination of the 'same as' trees during the Data Consistency Check (see step 15).
   - Ensure that the column **'Confirmation only'** is always populated with '0', unless the new determination is the same as the old determination (and is therefore only a Confirmation, rather than an update, in which case enter '1'. Ie. Confirmation only='0' will update the determination.
4. Save the template file.
   - Ensure that the file contains no extra or missing columns. The file format and column sequence must exactly match the template.
   - Make sure that the top row contains the headers.

5. In ForestPlots.net navigate to the plot in 'MyPlots' and select 'Data Import' then 'Update Determinations'.
6. Select the prepared file, then click 'next'.
7. Select the worksheet that contains the prepared Determinations data, then click 'next'.
8. In the **Herbarium Identification screen**, check that the identified Herbarium is correct and click 'next'.
   - If the Herbarium is unidentified, match manually. Email admin@forestplots.net if your herbarium is not listed in Forestplots.net.

9. In the **Collector Identification screen**, check that the identified Collector is correct and click 'next'.
   - If the Collector is unidentified, match manually and check that the collector initials match those in your Voucher Import file Email.
10. In the **Voucher Code Validation screen**, check that all Vouchers are listed as Valid and click 'next'.
   - If any are Invalid, go back and check your data, do not continue with the Upload.

11. In the **Species Validation screen** check that the Species in your file are matched to the ForestPlots Master Species List, click 'next'.
   - If any appear in 'Species not found' match manually to the Master List. If any are new species, please email admin@forestplots.net.

12. In the **SubSpecies Validation screen** check that the SubSpecies and Varieties in your file are matched to the ForestPlots Master SubSpecies List, click 'next'.
   - If any appear in 'Species not found' match manually to the Master List. If any are new Subspecies, please email admin@forestplots.net.

13. In the **Record Data Validation** screen, check that all records are listed as 'Valid' (i.e. current determination, voucher code and herbarium (if included) in the upload file match what is currently stored in ForestPlots **for each treeid**) , click 'next'.
   - If any are Invalid, go back and check your data, do not continue with the Upload.

14. The **Voucher Consistency Check** screen will list any Voucher Codes missing from the upload file, i.e. treeids that appear in the file but have a **'collected'** Voucher Code in ForestPlots that is not included in the upload file.
   - You can download this list and check these additional voucher codes.
   - In ForestPlots: Confirm (+) or Reject (-) each of these additional Vouchers.
     o By Confirming: the additional Voucher determination (and any associated stems) will also be Updated..
     o By Rejecting: the additional Voucher (and any associated stems) will remain as the old determination (currently stored in ForestPlots).
   If there are no missing Vouchers this screen will be blank. Click 'next'.

15. The **Data Consistency Check screen** will list all treeids from the upload file that have a collected Voucher in the tab **'Collected From Records'**. The 2nd tab, **'Unconfirmed Records'**

will list any treeids in ForestPlots that are also linked with those Voucher Codes (i.e. the same as/non collected stems), **even if they are not included in the upload file**.

- DOWNLOAD this list and check that for each voucher code all non collected stems have a similar current determination as the collected stem. Any discrepancies should be investigated further; check for stems that may have previously been linked to the wrong voucher in error.
- In ForestPlots **'Unconfirmed Records'** tab: Confirm or Reject each treeid record.
    - Confirmed records will have their determination updated to match the new determination of the Collected Voucher.
    - Rejected records will not have their determination updated to match the new determination of the Collected Voucher, and will keep their current determination in ForestPlots.

If there are no Vouchers, or no 'same as' treeids, the tab(s) will be blank, Click 'next'.

16. Click 'Finish', update completed.

If you have any queries please contact admin@forestplots.net.