How to Update Determinations

Determinations can be updated using 4 methods: manually one by one through the ForestPlots.net interface (View Tree/View Liana screen: Tree Details tab), or via Data Import either during a new census upload, during Voucher import, or using the 'update determinations' wizard. This checklist provides information for how to update determinations using the 'Update Determinations' Data Import wizard.

1. Log in to ForestPlots.net and navigate to the plot in MyPlots
2. Generate 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 'headers'.
   - We recommend downloading a 'Taxon Manager Plot Dump' (found in 'Data Export') to obtain the data required for the file
   - Ensure that any voucher codes are already stored in ForestPlots.net. If the voucher hasn't been uploaded you should use 'Import Vouchers' instead, entering the new determination in the 'Import Vouchers' template file.
4. Save the template file
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 voucher 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'
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
12. In the Record Data Validation screen, check that all records are listed as 'Valid', click 'next'
13. Click 'Finish', update completed