



## Data Submission Protocol

This protocol assists in the submission of bulk data to BOLD. It describes the necessary format of the data that is required for a correct submission.

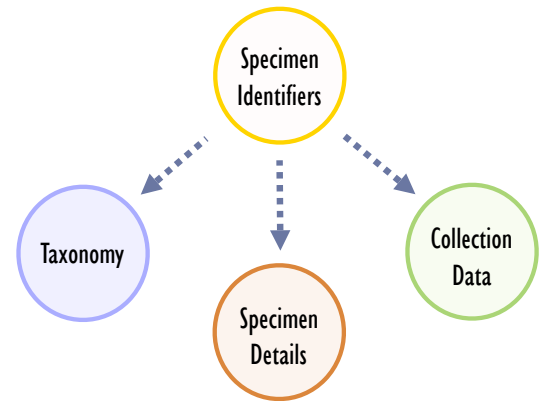
Whenever a bulk submission is sent to the data manager, the following pieces of information need to be sent along with the standard submission spreadsheet:

- I. Project title
- II. Project code
- III. Project manager
- IV. Priority Level (High, Intermediate or Low)
- V. Submission type (New Records or Update)\*

\* If type is 'Update': Please specify which worksheets (Voucher Info, Taxonomy, Specimen Details, or Collection Data) need to be updated.

See next page for more information.

The data spreadsheet consists of 4 worksheets, a specimen identifier worksheet (voucher info) that is referenced by a taxonomy, specimen details, and collection data sheet (Field definitions on Table 1 to 4).



Sample ID	ID associated with sample begin sequenced (often an extension of field or Museum Id)
Field ID	Specimen identifier from a private collection or Field number from a collection event.
Museum ID	Catalog number in curated collection for a vouchered specimen
Collection Code	Code associated with a given collection
Institution Storing	Institution where specimen is vouchered (controlled list)
Sample Donor	Individual or institution responsible for providing specimen or tissue sample.
Donor Email	Email of the sample donor

Table 1 : Field definitions for Voucher Info page on accompanying spreadsheet

Sex	Male/female/hermaphrodite (controlled list)
Reproduction	Sexual/asexual/cyclic parthenogenesis (controlled list)
Life Stage	Adult/immature (controlled list)
Extra Info	User Specified Characteristic (free text) - Can be displayed on tree or used to sort records, max 50 characters
Notes	Free text or XML tagged text. All XML text should be surrounded by the XML start(<xml>) and stop (</xml>) tags.

Table 3 : Field definitions for Specimen Details page on accom-

Full Taxonomy	Full taxonomy consisting of pylum, class, order, family, subfamily(optional), genus, species binomial
Identifier	Primary individual responsible for providing taxonomic identification of the specimen
Identifier Email	Email address of the primary identifier
Identifier Institution	Institution of the identifier

Table 2 : Field definitions for Taxonomy page on accompanying spreadsheet

Collectors	Comma delimited list of collectors
Collection Date	Date of collection, must be in MMM-DD-YYYY format.
Country/FAO region	ISO Country name, Ocean, or FAO region
State/Province	States and provinces (Controlled list according to Getty Geographical Thesaurus)
Region	Park, county, district, lake or river
Sector	Sector of park or county
Exact Site	Description of collection location
GPS Coordinates	Latitude & Longitude in "degrees.decimal degrees" format (e.g. 45.837)
Elevation/Depth	Elevation or depth in meters

Table 4 : Field definitions for Collection Data page on accompanying spreadsheet

# Data Submission Protocol Continued

There are two types of submissions: “New Submission” and “Update”.

## 1. New Submission

New submissions are project specific, so that their data can be associated with a project on BOLD. If records are submitted that need to be entered into different projects on BOLD, a separate file for each project needs to be sent.

The minimal requirements for a new submission on BOLD are:

- Voucher Info Page - Sample ID
- Voucher Info Page - Field ID and/or Museum voucher ID
- Voucher Info Page - Institution Storing
- Taxonomy Page - Phylum

*Other useful information:*

Try to be unique when making up the format of your sample IDs. If the sample IDs you provide are not original to BOLD, you will have to change them before the data can go online.

The more data and details you provide with your new submissions, the less time it will take later to try and update the blanks.

## 2. Updated Submission

The quickest way to update data is to download the Data Spreadsheet from BOLD containing the records that need to be modified. Only download the worksheets and records that will be affected by the update (e.g. if the taxonomy needs to be updated only download the Taxonomy worksheet, if specimen details and collection date need to be update only download the Specimen Details and Collection Data worksheets, etc.). Once the worksheets are downloaded, modify the data and copy it into the standard submission spreadsheet. The submitted update should reflect what the data should be on BOLD.

NOTE: All empty fields will be blanked! The computer cannot distinguish between “blank: do not update this field’ or “blank: delete the content of this field”.

Updates to Voucher Info are slightly different from updates to Taxonomy, Specimen Details, and Collection Data.

### a.) Updates to Voucher Info

Identical to new submissions, updates to the voucher info are project specific. The records need to be split into their corresponding project.

### b.) Updates to Taxonomy, Specimen Details, and Collection Data

Updates to taxonomy, specimen details, and collection data are project independent. Records from any number of projects can be submitted in one submission spreadsheet, and the number of records are (in theory) infinite for this type of update.