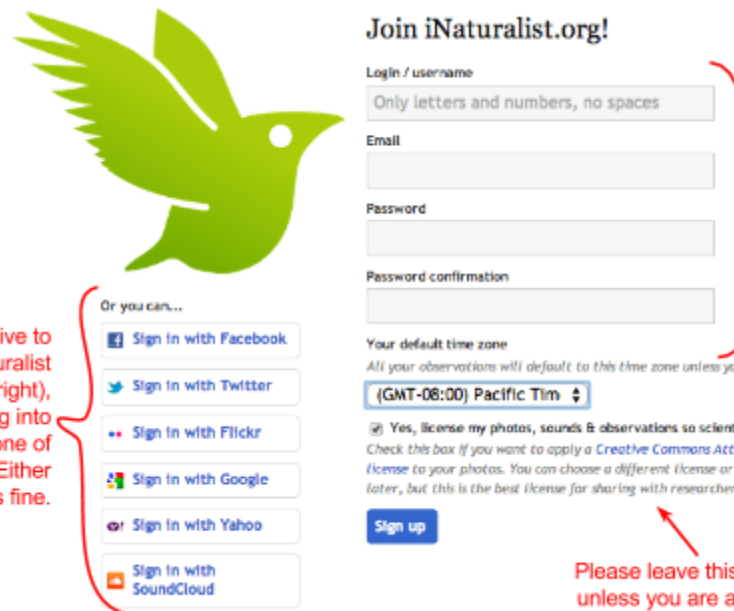


Connecting Students to Citizen Science and Curated Collections

How to use iNaturalist

I. Set up a personal account and join the class project.

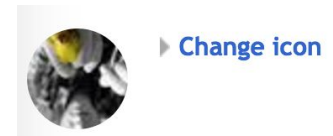
1. Go to <http://www.iNaturalist.org> and click on “Sign Up” in the upper righthand corner of the home page. Fill out the required information as shown below:



The screenshot shows the iNaturalist sign-up form. On the left is a green bird icon. The form has fields for 'Login / username', 'Email', 'Password', and 'Password confirmation'. Below these are social media login options: Facebook, Twitter, Flickr, Google, Yahoo, and SoundCloud. A 'Sign up' button is at the bottom. A time zone dropdown is set to '(GMT-08:00) Pacific Tim'. A checkbox is checked for 'Yes, license my photos, sounds & observations so scientists can use my data!'. Red annotations include: a bracket pointing to the username, email, and password fields with the text 'Fill in these fields. For the purposes of this class, your username needs to be your first and last names combined, e.g. "JaneDoe."'; a bracket pointing to the social media login options with the text 'As an alternative to creating an iNaturalist log in (on the right), you may log into iNaturalist with one of these accounts. Either way is fine.'; and an arrow pointing to the checked checkbox with the text 'Please leave this box checked unless you are against having your observation data shared.'

2. Once you have an account and are logged in, hover over your username in the upper righthand corner of the home page and click on “Profile.” This will bring you to your user profile, where you can access information about observations and species observed for yourself, people you follow, and projects you are a part of. Click on “Edit account settings & profile,” underneath your avatar/icon image.

3. Add a photo of yourself or something to represent yourself by selecting “Change Icon” (shown in the image to the right).



4. You may also add a brief bio, change your email notification settings, link your iNaturalist account to external photo hosting services, modify the licensing on any photos you upload, etc. When you are finished editing, click “Save” to return to your profile home page.

5. Now it's time to join your class project. On the top navigation bar, hover over “Projects,” and in the search bar on the drop-down menu that appears, type in “Connecting Students to Citizen Science and Curated Collections.” This will bring up the project illustrated to the right.



Connecting Students to Citizen Science and Curated Collections

This iNaturalist project is part of a curriculum design for an updated university-level botany course that ...

- Go to the project page, click on “Join this Project” in the top righthand corner, and follow the steps as prompted. Once you have joined the project, it will show up under “Projects” on the top navigation bar whenever you are logged in.

II. Make an observation.

Every time you collect a specimen you will also photograph the living plant and make an observation on iNaturalist. In addition to photographs, you will need to record the following important information on your iNaturalist observation. You will use this data to print labels for your herbarium specimens.



As you fill out your observation information on iNaturalist, the following fields will automatically populate for you:

Country, State, County

Lat/Lon Coordinates

Common Name

Taxonomic authority (your instructor will add the authority to your specimen identifications prior to printing herbarium labels)

You must make sure to enter information for:

Species-level Identification [NOTE: Do not enter the

authority name in iNaturalist or else it will not recognize your species! As you begin typing the plant’s name, iNaturalist will offer suggestions—make sure you select the correct species from one of the options it brings up. If iNaturalist does not bring up the species you are trying to identify the observation as, check with your instructor because every so often iNaturalist uses different taxonomy than is found in the source your course uses, although this should be a rare occurrence.]

Collection Date

Description (note qualities of the plant that will not be preserved in the specimen, e.g. color)

Tags [NOTE: you **must** “tag” all of your observations with your institution’s herbarium code (e.g. “SCFS”) so that your instructor can easily sort observations for your class. Ask your instructor what herbarium code to use.]

Municipality (e.g. town or region, iNaturalist will help you fill this in when you search for location)

Collector Name (First name, Middle initial, Last name)

Associated Collectors (if present)

Collector Number (no Roman numerals)

Locality Description (driving directions)

Habitat

Associated Species (optional)

Tips for iNaturalist Photos

- Take several per plant, but all of the same plant.
- Capture important diagnostic features, e.g. needles/leaves, bark, overall shape, etc.
- Make sure your photos are in focus.
- Upload your photos to iNaturalist immediately! Don't guess which photos belong to which observation.

Here's how to make a new observation on iNaturalist ([see video at https://vimeo.com/179137654](https://vimeo.com/179137654)):

1. All observations for this course must be connected to the "Connecting Students to Citizen Science and Curated Collections" project. The easiest way to do this is to go to the project page and click on the orange "Add Observations" button. Note: If you forget to upload this way, you can add previously uploaded observations to a project via the "Add to Project" button on each observation record page.
2. Selecting "Add Observation" will bring up the screen illustrated below. Fill in the information as shown.

Add an observation to **Connecting Citizen Sci...** Add: Batch · From list · Import · From photos

What did you see? ID Please? **Mimulus lewisii** [Lookup](#)
Lewis' Monkeyflower (Mimulus lewisii)

Was it captive / cultivated?

When did you see it?
2014-07-05
(GMT-08:00) Pacific Time (US & C) | e.g. "2014-08-12 15:31:57", yesterday at 4pm

Description
Flowers pale pink. No scent.

Where were you?
North Fork of the American River
Lat: 39.245873 Lon: -120.418892 [Edit](#)
Acc (m): 102 Src: manual

Add media
Add photos Add sounds
Source: your hard drive
Select one or more photos
Choose Files 3 files
 Sync obs. w/ photo metadata? [clear](#)

Upload at least one photo here. If your camera has a GPS, you can choose to "Sync obs. w/ photo metadata" and iNaturalist will automatically fill out your location and date info.

Type a place into the box under "Where were you?" to search the map. Zoom in and click on this map to automatically fill in the Lat/Lon fields.

You may choose to "tag" your observation here with relevant keywords that would help other users find your observation in searches. IMPORTANT: if your instructor tells you to, you must tag every observation you make with your herbarium code, e.g. "SCFS"!!

Tags Comma-separated, please
wildflower, SCFS

Fields for Connecting Citizen Science to Curated Collections

Collector * Erica R. Kimmel

Collector Field Number * 539
If a collector/observer's field number is associated with this occurrence please include it.

Locality Description * Cedar Creek, 0.25 miles below the
Where was the specimen collected?

Habitat * Riparian
A description of habitat

Associated Species
Monardella sheltonii, grasses, Rub

* required

More fields
Add a field Start typing field [Create a new field](#) [View all fields](#)

When you've entered all the required information, click "Save observation." You can always go back and edit.

[Save observation](#) [Save and add another](#) [Cancel](#)

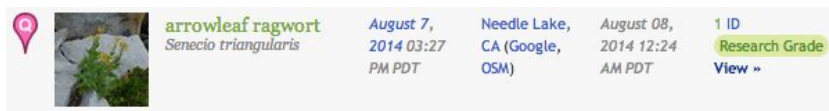
Please do not upload in batches, or from photos, because iNaturalist will not bring up the additional required fields for this project. You can, however, make observations using the iNaturalist mobile app (see video at <https://vimeo.com/179173153>).

3. Making observations on the iNaturalist mobile app can be convenient if you own a smartphone or tablet and would like to take photos and record your data while in the field. The app can be used offline, and synced once you get back into internet range or cellular reception. Download the app on your mobile device, sign into your iNaturalist account, and enter the same information as shown in the directions above. Please note you **always** need to add observations to “Connecting Students to Citizen Science and Curated Collections” project so that the additional fields required will show up on the data entry screen.

III. Add identifications and comments to your classmates’ observations.

Commenting and adding identifications to your classmates’ observations is an important aspect of this class. Add an identification either to confirm your classmate’s identification, or to suggest a different one. Add a comment if you have questions about the identification or observation, or to share helpful identifying features, e.g. “I believe this is XYZ species because the leaves are tomentose, versus ABC species, which has glabrous leaves.”

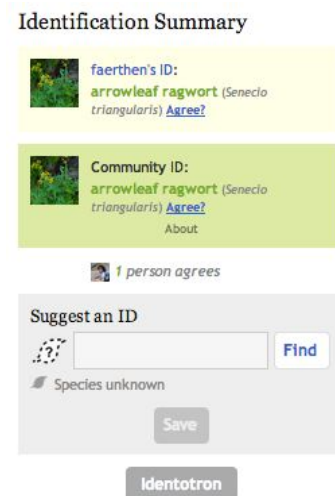
1. To add an identification, first find one of your classmate’s observations that you are interested in.



You can find a list of observations below the map on the project homepage. In the image above, notice that

this observation has been marked as “Research Grade” (two or more identical IDs); try to add identifications to observations that have not yet become research grade.

2. Click on the observation you want to ID, and you will see a box called “*Identification Summary*” on the right side of the observation page. You have two options: either “*Agree*” with someone else’s ID, or “*Suggest an ID*” below if you believe the plant has been misidentified.
3. You can add a comment at the bottom of the observation page.



IV. Additional Resources

iNaturalist offers additional support for users on these pages:

- <http://www.inaturalist.org/pages/getting+started>
- <http://www.inaturalist.org/pages/video+tutorials>
- <http://www.inaturalist.org/pages/help>