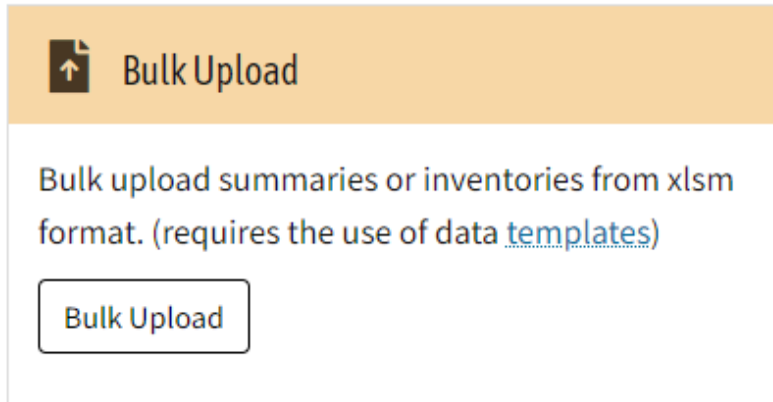


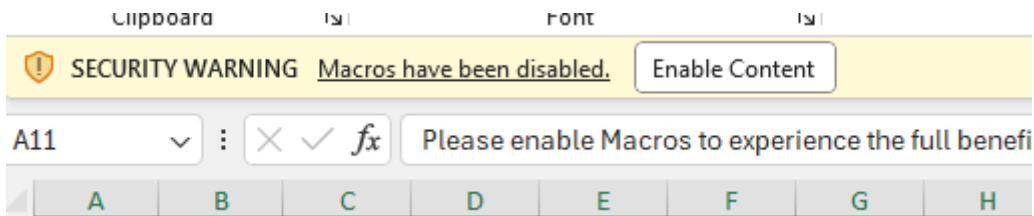
# Guidance for Submitting Preliminary Inventories and Summaries

## Via Bulk Upload

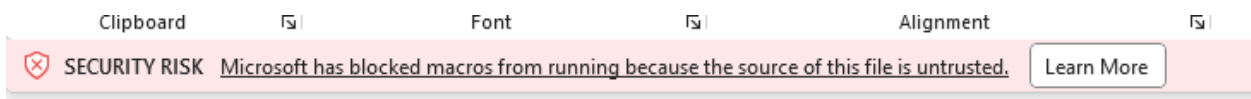
1. Users should ensure they use the newest template. The template can be found [here](#) or on the Dashboard of the user's account.



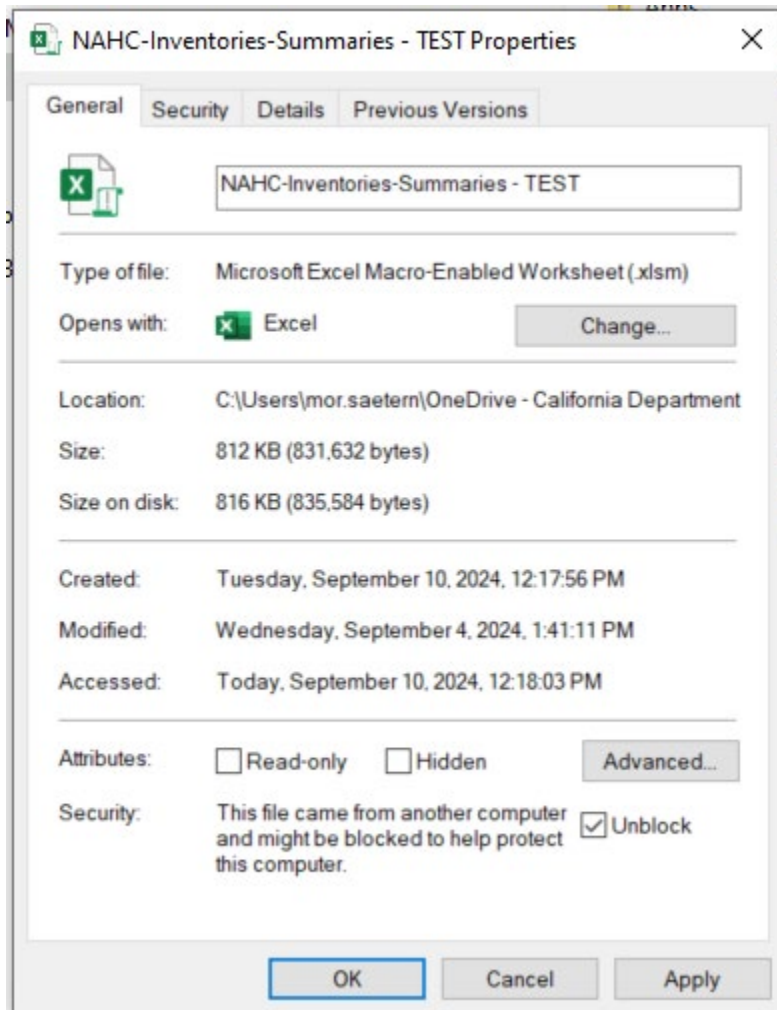
The template is embedded with macros. To enable macros, click "Enable Content" in the security warning table displayed at the top:



If there is no "Enable Content" at the top of the display and you see this warning,



exit the template. Go to the folder where you saved the template, right click the file and click "Properties." When the "Properties" box comes up, click the "Unblock" box.



## 2. Manually save the template.

If you modify the template and only hit “Yes” to save the document after hitting the “Exit” button, that may create data errors during the upload process. You should manually click the “Save” button prior to hitting the “Exit” button, and any validation errors should appear then.

## 3. Do not delete tabs in the template.

You should not delete tabs from the workbook and should simply leave those tabs blank even if you have no Summary or Inventory data to provide. If you have already deleted tabs, you will need to copy the Inventories or Summaries data to a new Excel sheet using the steps below.

**4. You should not modify names of columns in the header and should not add additional columns.**

If an older file is utilized, or you made any of the above errors, it is simple to copy and paste the data from the old Excel sheet to the new Excel sheet.

This is how to do it:

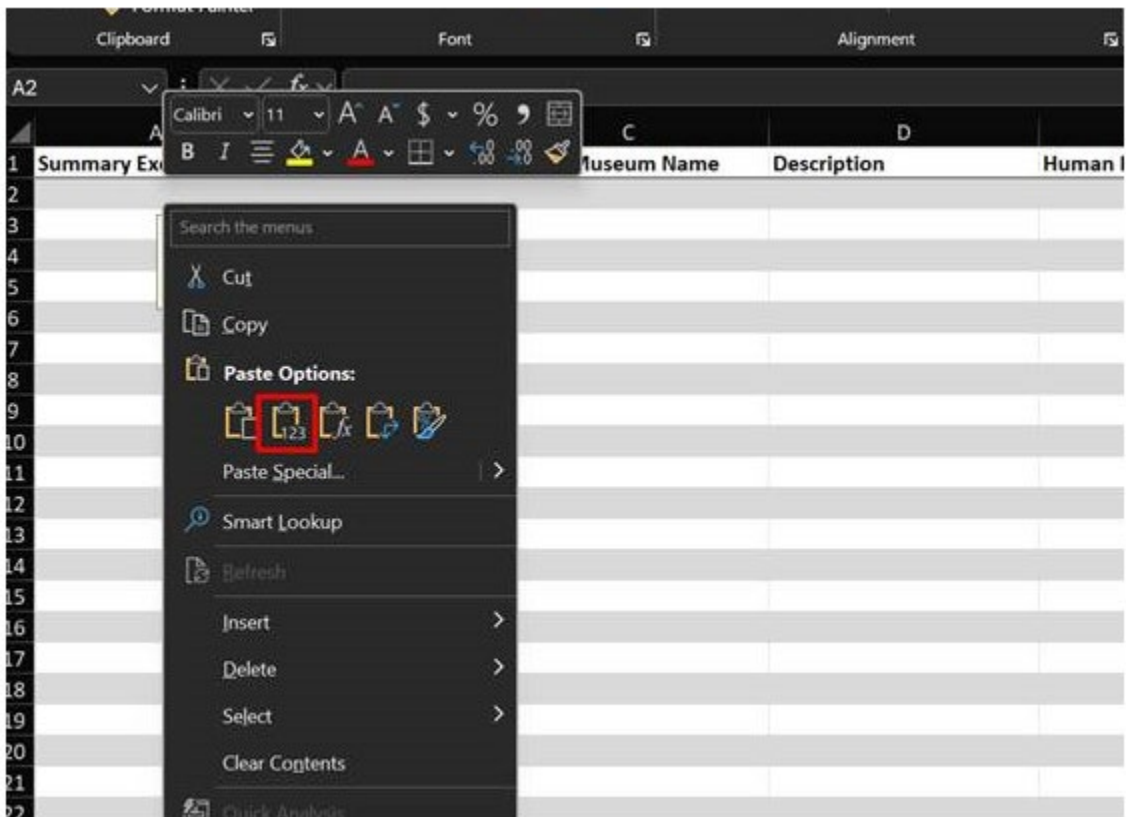
- i. Go to either Inventories tab or Summaries tab. Select all the rows except for the header row and copy.

Inventories Excel ID	Agency/Museum Name	Geographical Location County	Geographical Location City	Geographical Location Other Information	Site Number/Name	Item/Lot Information	Collection Type	Source Type
2	BIOANTH-001	San Diego State University Biological Anthropology Laboratory	San Bernardino County		USGS Quad Yucaipa, T25, R2W, unsectioned	SBR-1000	Archaeological Collection	Archaeologist
3	BIOANTH-002	San Diego State University Biological Anthropology Laboratory	Unknown				unknown	unknown
4	BIOANTH-003	San Diego State University Biological Anthropology Laboratory	Unknown				unknown	unknown
5	BIOANTH-004	San Diego State University Biological Anthropology Laboratory	Unknown				unknown	unknown
6	BIOANTH-005	San Diego State University Biological Anthropology Laboratory	Unknown				unknown	unknown
7	BIOANTH-006	San Diego State University Biological Anthropology Laboratory	Unknown				unknown	unknown

- ii. Go to the new excel file and the corresponding worksheet. Select the first row below the header and paste.

	A	B	C	D
1	Inventories Excel ID	Agency/Museum Name	Geographical Location County	Geographical Location City
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				

- iii. When copying data from other places, you should use the paste option of “Values” highlighted in red below as even simple pasting can change the formatting of the file and corrupt it.



## 5. Tips for filling out the Excel sheet:

**Inventories/Summaries Excel ID Column:** Although this field is not marked mandatory, it is **MANDATORY**. This is not the same as the Inventory/Summary ID that will be automatically generated by the database. Enter any value, number, or text in this column as long as it is unique for each row.

**Dropdown List Columns:** For any column that contains a dropdown list, the user must select data from the dropdown menu.

Some columns will only allow you to select one item. If you make a mistake, just reselect the correct item.

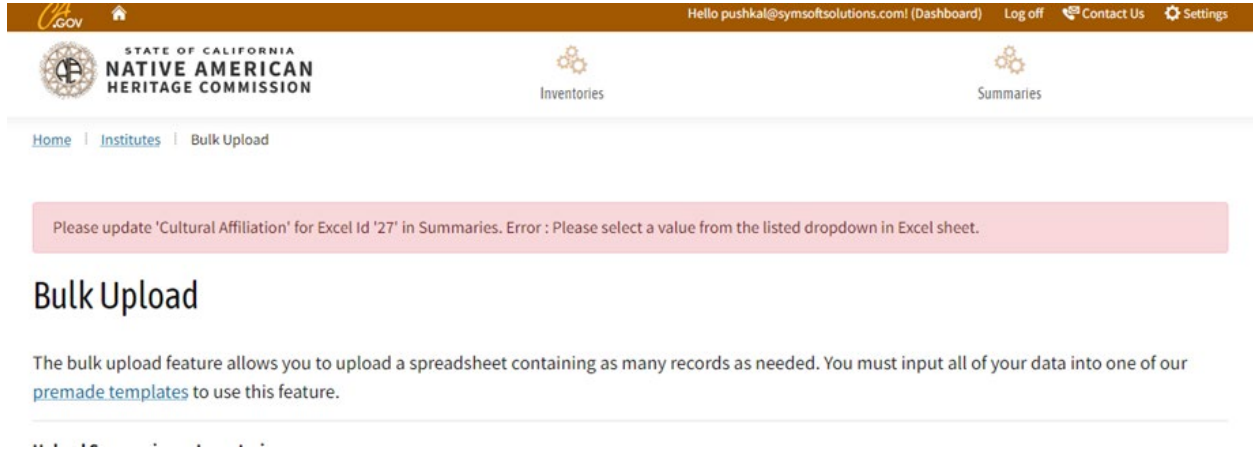
Some columns will allow you to select multiple items. If you make a mistake, reselect the incorrect item and that will remove the incorrect item from your selection.

**Date Columns:** The format for all date columns is mm/dd/yyyy. Do not enter any text.

**Website address:** This must contain a full address and start with Https:// \_\_\_\_\_

## 6. Correcting validation errors when uploading the Excel sheet:

You may encounter error issues when you upload the spreadsheet. Error messages will be displayed as below. Follow the instructions, correct the errors, and resubmit.



The screenshot shows the top navigation bar of the State of California Native American Heritage Commission website. The header includes the logo, the text "STATE OF CALIFORNIA NATIVE AMERICAN HERITAGE COMMISSION", and navigation links for "Inventories" and "Summaries". Below the header, there is a breadcrumb trail: "Home | Institutes | Bulk Upload". A prominent pink error message box states: "Please update 'Cultural Affiliation' for Excel Id '27' in Summaries. Error : Please select a value from the listed dropdown in Excel sheet." Below the error message, the heading "Bulk Upload" is displayed, followed by a paragraph explaining the feature: "The bulk upload feature allows you to upload a spreadsheet containing as many records as needed. You must input all of your data into one of our [premade templates](#) to use this feature."