Guidance for Submitting Preliminary Inventories and Summaries Via Bulk Upload

1. Users should ensure they use the newest template. The template can be found <u>here</u> 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,

Clipboard		Font	5	Alignment	
SECURITY RISK	Microsoft has blo	cked macros from runnin	ig because the sourc	e of this file is untrusted.	n More

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.

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X II	NAHC-Inventories-Su	mmaries - TES	т	
ype of file:	Microsoft Excel Macro	-Enabled Work	(sheet (.xlsm)	
)pens with:	Excel		Change	
ocation:	C:\Users\mor.saetern\	OneDrive - Cal	ifornia Departme	
Size:	812 KB (831,632 bytes))		
Size on disk:	816 KB (835,584 bytes)			
created:	Tuesday, September	10, 2024, 12:17:	56 PM	
Nodified:	Wednesday, Septemb	per 4, 2024, 1:41	I:11 PM	
ccessed:	Today, September 10	, 2024, 12:18:03	PM	
Attributes:	Read-only	lidden	Advanced	
Security:	This file came from another computer I Unblock and might be blocked to help protect this computer.			

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.

-									
1	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, TZS, R2W, unsectioned	SBR-1000		Archaeological Collection	Archaeologist
3	BIOANTH-002	San Diego State University Biological Anthropology Laboratory	r Unknown					unknown	unknown
4	BIOANTH-003	San Diego State University Biological Anthropology Laboratory	r Unknown					unknown	unknown
5	BIOANTH-004	San Diego State University Biological Anthropology Laboratory	r Unknown					unknown	unknown
6	BIOANTH-005	San Diego State University Biological Anthropology Laboratory	Unknown					unknown	unknown
0		San Diego State University Biological							
7	BIOANTH-006	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.

	А		В	С	D	
1	Inventories Excel ID		Agency/Museum Name	Geographical Location County	Geographical Location City	
2						
3		This is a				
4		Mandatory	,			
5		Field.				
6						
7						
8						
9						
10						
11						
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12						

 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.

Clipboard	rs.	Font	a	Alignment	rs.
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15	Insert	>			
17	<u>D</u> elete	>			
19	Select	>			
20	Clear Contents				
22 2	Chuick Analysis				

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.



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