

DWB-DA: Transaktionen an Naturhistorischen Sammlungen am Beispiel von Ausleihen von Material der BSM

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Outline

- Material transaction @BSM
- Management (analogic/digital)
- Diversity Workbench (DWB)
 - Modules: Agents & Collection
- Use cases: Madrid (Spain)

Transaction overview



Transaction Types

- Gift
- Inventory
- Return
- Loan
- Purchase



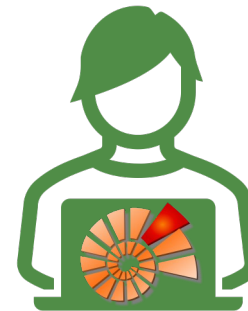
Geographical scope

- Global scale



Analog Management

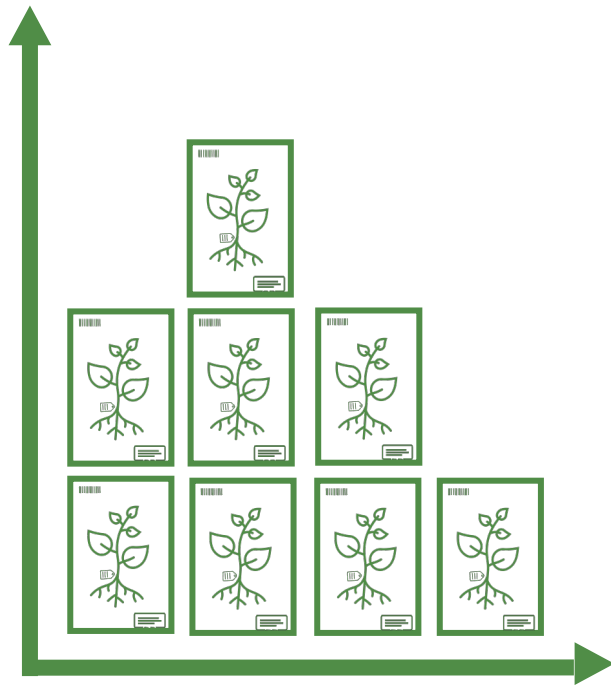
- Loan Book
- Address Book (Agents cards)
- Institution folders
- By Ingrid Sebek



Digital Management

- DWB – Agents & Collection Modules

Transaction overview



Loans Fact

- Average last 34 years
 - 3937 units
 - 94 package
 - + 300 Organisation incl. contact partner
- Last year (2022):
 - 1435 units
 - 31 package
 - 31 Countries

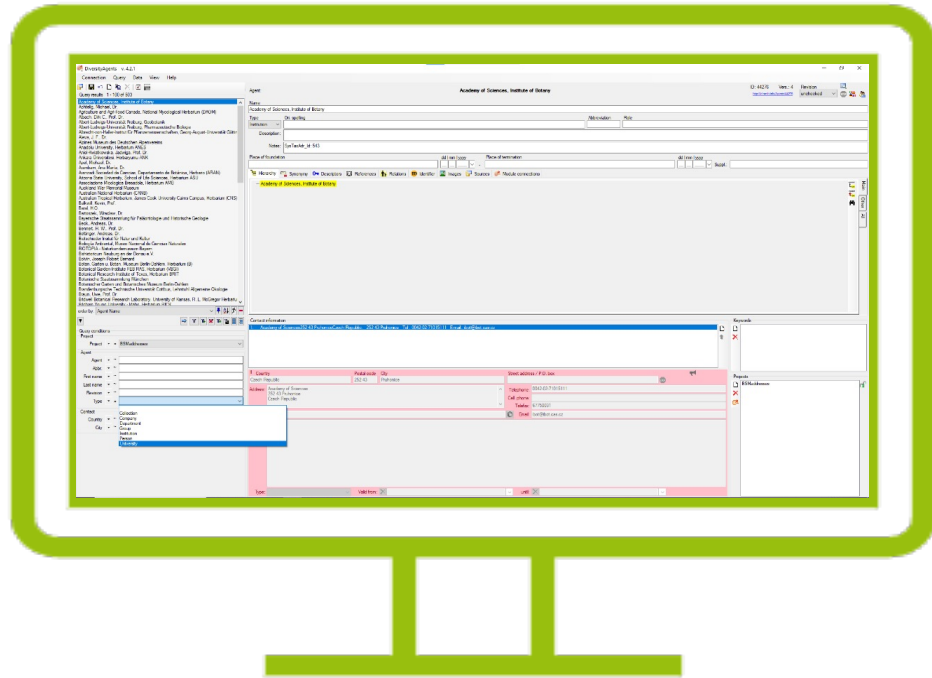
DWB | DAgents

Important!

- Project:
 - Makes use of the Address project
- Contact information
- Exchanges mainly done with botanical collections
- Very important:
 - Keep agents information up to date!

Agents type

- Person
- Group
- Collection
- University
- Institution
- Department
- Company



DWB | DAgents

The screenshot displays the DiversityAgents v.4.2.1 interface. The top menu includes Connection, Query, Data, View, and Help. The main window shows a list of agents on the left and a detailed view of the 'Academy of Sciences, Institute of Botany' on the right. The detailed view includes fields for Name, Type, Institution, Description, Notes, Place of foundation, and Place of termination. Below these fields are tabs for Hierarchy, Synonymy, Descriptors, References, Relations, Identifier, Images, Sources, and Module connections. The bottom section shows contact information for the selected agent, including Country (Czech Republic), Postal code (252 43), City (Pruhonice), Street address / P.O. box, Telephone (0042-02-71015111), Cell phone (67750031), and Email (bot@bot.cas.cz). The interface also features a 'Query conditions' panel on the left and a 'Projects' panel on the right.

Academy of Sciences, Institute of Botany

Country: Czech Republic, Postal code: 252 43, City: Pruhonice, Street address / P.O. box: [redacted], Telephone: 0042-02-71015111, Cell phone: 67750031, Email: bot@bot.cas.cz

DWB | DAgents

The screenshot displays the DiversityAgents v.4.2.1 interface. The main window is titled "Real Jardín Botánico, Herbario (MA)". The interface is divided into several sections:

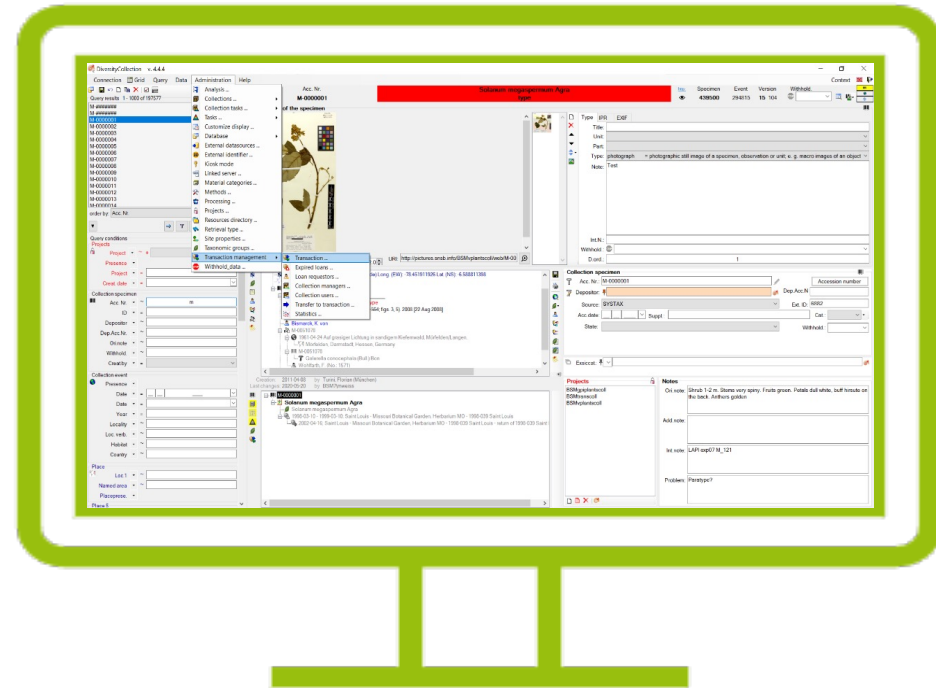
- Query Results (Left):** A list of agents, with "Real Jardín Botánico, Herbario (MA)" selected. The list includes details like "Biología Ambiental, Museo Nacional de Ciencias Naturales" and "Universidad Autónoma de Madrid, Departamento de Biología (Botánica)".
- Main Data Entry Form (Center):** Fields for Name, Type, Collection (set to MA), Abbreviation (set to MA), Description, Notes (SysTaxAdr_Id: 696), Place of foundation, and Place of termination.
- Contact Information (Bottom):** A section with a list of contacts. The first contact is "Herbario (MA) Real Jardín Botánico CSIC Plaza de Murillo 2 28014 Madrid SPAIN". Below this, fields for Country (Spain), Postal code (28014), City (Madrid), Street address (Plaza de Murillo 2), Telephone, Cell phone, and Telefax are visible.
- Left Panel (Bottom):** A section for filtering and sorting, including "order by: Agent Name" and "Query conditions Project = BSMAddresses".
- Right Panel (Bottom):** A section for "Keywords" and "Projects", with "BSMAddresses" selected.

Green arrows highlight specific areas: one points to the "Collection" field, another to the "Abbreviation" field, a third to the "Contact Information" list, a fourth to the "Country" field, and a fifth to the "City" field in the contact information section.

DWB | DCollection – Transaction

Important!

- Transaction Code (Year-Number)
- Country & City
- Transaction type*
- Loan duration
- Generation of documents:
 - Shipment forms
 - Acknowledgement of complete & partial return



Transactions type*

- Forwarding
- Gift
- Inventory
- Return
- Loan
- Purchase

DWB | DCollection – Transaction

The screenshot displays the DiversityCollection v.4.4.4 interface. The 'Administration' menu is open, with a red dashed box highlighting the 'Transaction management' option. A green arrow points to this menu. Another green arrow points to the 'Transaction ...' option within the 'Transaction management' submenu. The main window shows a specimen record for *Solanum megaspermum* Agra, with accession number M-0000001. The interface includes various panels for specimen details, collection events, and projects.

Connection: Grid Query Data Administration

Query results 1 - 1000 of 197577

Acc. Nr. M-0000001

Solanum megaspermum Agra type

Specimen 439500 Event 294815 Version 15 104 Withhold.

Type IPR EXIF

Title:

Unit:

Part:

Type: photograph = photographic still image of a specimen, observation or unit; e. g. macro images of an object

Note: Test

Int.N.:

Withhold:

D.ord.: 1

Transaction management

Transaction ...

Expired loans ...

Loan requestors ...

Collection managers ...

Collection users ...

Transfer to transaction ...

Statistics ...

Risnerck, K. von

M-0051078

1961-04-24 Auf grasiger Lichtung in sandigem Kiefernwald, Mürfelden/Langen, M-4 Morfelden, Darmstadt, Hessen, Germany

M-0051078

Galerella conocephala (Bull.) Bon

Wohlfarb, F. (No: 1571)

Creation: 2011-04-08 by Tünni Florian (München)

Last changes: 2020-05-20 by BSM7/mwais

M-0000001

Solanum megaspermum Agra

1995-03-10 - 1999-03-10, Saint Louis - Missouri Botanical Garden, Herbarium MO - 1995-039 Saint Louis

2002-04-16, Saint Louis - Missouri Botanical Garden, Herbarium MO - 1998-039 Saint Louis - return of 1995-039 Saint Louis

Collection specimen

Acc. Nr. m

ID

Depositor

Dep.Acc.Nr.

Orig. note

Withhold

Create by

Collection event

Presence

Date

Date

Year

Locality

Loc. verb.

Habitat

Country

Place

Loc. 1

Named area

Placeprese.

Place 5

Collection specimen

Acc. Nr.: M-0000001

Accession number

Depositor:

Dep. Acc. N.

Source: SYSTAX

Ext. ID: 6882

Acc. date:

Suppl.:

Cat.:

State:

Withhold:

Exsiccat.:

Projects

BSMgpiplantscoll

BSMtranscoll

BSMvplantscoll

Notes

Orig. note: Shrub 1-2 m. Stems very spiny. Fruits green. Petals dull white, buff hirsute on the back. Anthers golden

Add. note:

Int. note: LAP1 exp07 M_121

Problem: Paratype?

DWB | DCollection – Transaction

Administration of transactions

2017-028 San Francisco ID: 4610

Query results 1 - 500 of 1122

1997-057 San Francisco

1997-058 Rauh

1997-060 Barcelona

1997-063 Wien

1997-064 Kyongsan

1997-066 Leiden

1997-072 Heverlee

1997-079 Pretoria

1997-082 Bronx

1997-083 Meise

1997-089 Barcelona

1997-090 San Francisco

1997-092 Erlangen

1997-095 Halle (Saale)

1997-097 Stockholm

1997-098 Córdoba ESP

1997-100 Rovereto

1997-102 Rondobosch

1997-104 Madrid

1997-108 Leiden

order by: Transaction

Query conditions

Transaction

Name ~

ID ~

ParentID ~

Type = loan

Begin > 1991/1/1

End ~

Comment ~

Notes ~

Investigator ~

From

Number ~

Partner ~

Collection ~

To

Collection ~

Number ~

Partner ~

Material

Admins coll. ~

Description ~

Source ~

Category ~

Logging

Creator ~

Cre date ~

Updater ~

Upd date ~

Agent

Agent ~

Role ~

Payment ~

Transaktion

San Francisco

California Academy of Sciences, Botany Department, Herbarium CAS

1997-06-10; 1997-057 San Francisco

return of 1997-057 San Francisco

1997-10-02; 1997-090 San Francisco

return of 1997-090 San Francisco

1999-05-18; 1999-045 San Francisco

return of 1999-045 San Francisco

2005-02-17; 2005-019 San Francisco

2006-07-03; 2006-020 San Francisco

return of 2006-020 San Francisco

2006-07-03; 2006-021 San Francisco

return of 2006-021 San Francisco

return of 2006-021 San Francisco; 0000-00-00

2009-03-17; 2009-024 San Francisco

2017-08-30; 2017-028 San Francisco

Administration: [v]

Details [x] Statistics [x] Sending [x] Confirmation [x] Reminder [x] Saved [x]

Type: loan

Admin. coll.: M | M-VascularPlants

Transact.: 2017-028 San Francisco

Material: herbarium sheet

Mat. coll.: [v]

Mat. descr.: [v]

Mat. source: [v]

Units: 3

From

Botanische Staatssammlung München

To

California Academy of Sciences, Botany Department, Herbarium CAS

Number: 2017-028

Recipient: Dr. Debra Trock

Collection: [v]

Begin: [x] 2017.08.30

End: [x] 2018.02.28

Suppl.: [v]

ProL: [x]

Categ.: vascular plants

Investigator: Dr. Frank Almeda

Comment: | No destructive sampling is permitted for type material.

List of standard phrases for comment: [v]

Respons.: [v]

Int: [v]

DWB | DCollection – Transaction

The screenshot displays the 'Administration of transactions' application. The main window, titled 'Madrid', shows a hierarchical tree view of transactions. A red dashed box highlights a transaction group starting with 'Facultad de Farmacia, Departamento de Biología Vegetal II, Univ. Complutense de Madrid, (MAF)'. Below this, numerous individual transactions are listed, including dates and descriptions like '2001-05-14; 2001-053 Madrid' and 'return of 2001-053 Madrid'. The left sidebar contains a list of transactions, with '1997-104 Madrid' selected. Below the list are query conditions and filters. The bottom section shows details for the selected transaction group, including 'Type: transaction group', 'Admin. coll.: M', and 'Transact.: Madrid'.

DWB | DCollection – Transaction

The screenshot displays the 'Administration of transactions' window. The main content area shows a transaction form for 'Botanische Staatssammlung München' (M). The form includes the following details:

- From:** Botanische Staatssammlung München, Menzinger Str. 67, 80638 München GERMANY. Contact info: Phone: 089 17861 265, FAX: 089 17861 193, E-mail: office.bsm@snsb.de.
- To:** Dr. Leopoldo Medina Herbario (MA), Real Jardín Botánico CSIC, Plaza de Murillo 2, 28014 Madrid, SPAIN.
- Material:** The Botanische Staatssammlung München is sending you as a loan the herbarium specimen(s) (79 vascular plants) specified in the list attached.
- Loan no.:** 2023-013.
- For study by:** Ariane Moreira and Dr. Ricarda Riina. Number of specimens: 79. Loan granted for 6 months. Return of material expected by 18. Oct. 2023.

The interface also features a left sidebar with a list of transactions, a top navigation bar with options like 'Details', 'Statistics', 'Sending', 'Confirmation', 'Reminder', and 'Saved documents', and a bottom section for 'Display text' and 'Notes'.

DWB | DCollection – Transaction

The screenshot displays the 'Administration of transactions' window in DCollection. The main area shows a transaction record for 'return of 2023-013 Madrid' (ID: 5950). The transaction is associated with 'Universidad Autónoma de Madrid, Departamento de Biología, Herb MAUAM' and is dated '2023-04-18; 2023-013 Madrid'. The record is categorized as a 'loan'.

Botanische Staatssammlung München
M
Menzinger Str. 67 80638 München GERMANY
Phone: 089 17861 265
FAX: 089 17861 193
E-mail: office.bsm@bsm.de

Botanische Staatssammlung München, Menzinger Str. 67
80638 München GERMANY

Dr. Leopoldo Medina
Herbario (MA)
Real Jardín Botánico
CSIC
Plaza de Murillo 2
28014 Madrid
SPAIN

München, 18. Jul. 2023

Acknowledgement for complete return

The Botanische Staatssammlung München is acknowledging herewith the return (complete return) of the herbarium specimen(s) (79 vascular plants) sent on loan to your institution.

Loan no. 2023-013

For study by: Ariane Moreira and Dr. Ricarda Riina
Number of specimens returned:
79 as a total
79 by latest partial shipment

The specimen(s) arrived in good order.

The right side of the interface shows a list of specimens on loan, with a green arrow pointing to the entry 'M-0067294 - herbarium sheets - Bolivia, Plurinational State of - 1904'.

DWB | DCollection – Transaction

Administration of transactions

2023-013 Madrid

Query results: 1 - 500 of 1122

1997-057 San Francisco
1997-058 Rauh
1997-060 Barcelona
1997-063 Wien
1997-064 Kyongsan
1997-066 Leiden
1997-072 Heverlee
1997-079 Pretoria
1997-082 Bronx
1997-083 Meise
1997-089 Barcelona
1997-090 San Francisco
1997-092 Erlangen
1997-095 Hale (Gaele)
1997-097 Stockholm
1997-098 Córdoba ESP
1997-100 Rovereto
1997-102 Rondebosch
1997-103 Madrid
1997-108 Leiden

order by: Transaction

Query conditions
Transaction
Name ~
ID ~
ParentID ~
Type = loan
Begin > 1991/1/1
End ~
Comment ~
Notes ~
Investigator ~

From
Number ~
Partner ~
Collection ~

To
Collection ~
Number ~
Partner ~

Material
Admini coll. ~
Description ~
Source ~
Category ~

Logging
Creator ~
Cre date ~
Updater ~
Upd date ~

Agent
Agent ~
Role ~

Payment

Transaktion

- 2015-09-22; 2015-037 Madrid
- return of 2015-037 Madrid
- 2016-10-24; 2016-047 Madrid
- return of 2016-047 Madrid
- 2017-06-13; 2017-010 Madrid
- return of 2017-010 Madrid
- 2017-07-19; 2017-021 Madrid
- return of 2017-021 Madrid

Administration: [v]

Details Statistics Sending Confirmation Reminder Saved documents

loan form 2023-013

Number of specimens: 79
Loan granted for 6 months. Return of material expected by 18. Oct. 2023.

Yours sincerely,

The Curator

Re: Determinavit labels, written in permanent ink or typed and signed, should be added to each collection return.
Any information which might be of value to future researchers should be provided.

Please verify the contents and acknowledge receipt by duplicate form.
Received the above specimens in good order.

Signed Date

Botanische Staatssammlung München M

Loan no. 2023-013

- M-0067294 Jatropa pedatipartita Kuntze
- M-0079776 Jatropa L.
- M-0079777 Jatropa L.
- M-0079778 Jatropa L.
- M-0079779 Jatropa L.
- M-0079780 Jatropa L.
- M-0079782 Jatropa L.
- M-0079784 Jatropa L.
- M-0079799 Jatropa L.
- M-0079803 Jatropa L.
- M-0079807 Jatropa L.
- M-0079822 Jatropa L.
- M-0079830 Jatropa L.
- M-0079831 Jatropa L.
- M-0079834 Jatropa L.
- M-0079841 Jatropa L.
- M-0079842 Jatropa L.
- M-0079843 Jatropa L.
- M-0079849 Jatropa L.
- M-0079850 Jatropa L.

Display text: loan form 2023-013 Type: [v]

Notes: [v]

Open pdf files

DWB | DCollection – Transaction

The screenshot displays the 'Administration of transactions' web application. The main window shows a transaction titled '2022-011 Trondheim'. The left sidebar contains a 'Query conditions' panel with filters for Transaction Name (2022-011), Type (loan), and other fields. The main content area shows a letterhead from the Botanic Garden of the University of Munich, dated 2022-01-11. The letter is addressed to Prof. Dr. H. Holien and details a loan of three fungal specimens. A red dashed box highlights a list of specimens, with a green arrow pointing to the entry for *Arthonia subfuscolata*. The list includes:

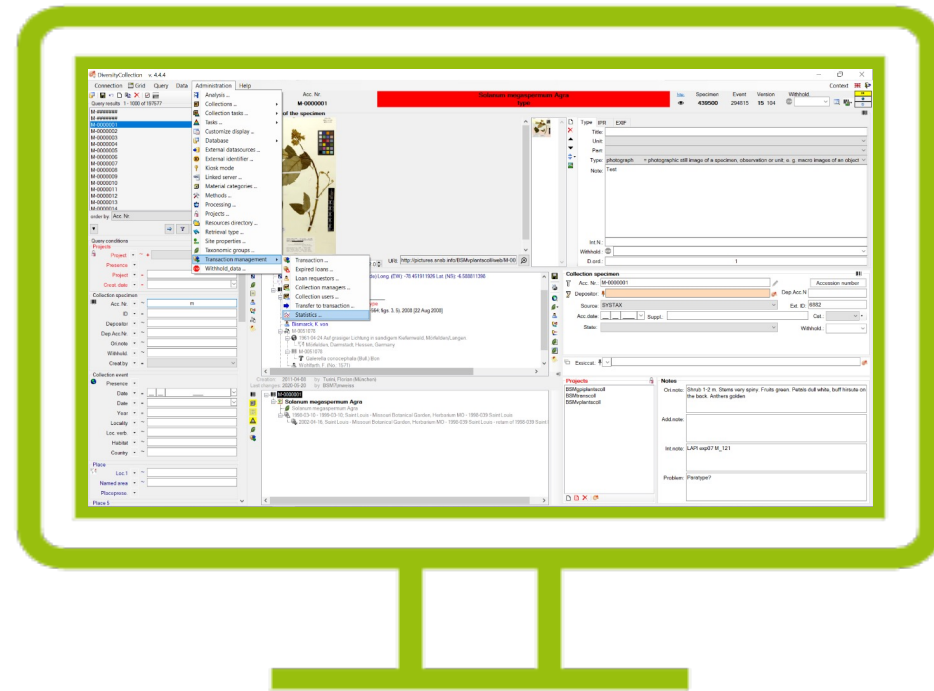
Loan no.	Specimen Name	Type
M-0040886	<i>Arthonia subfuscolata</i> (Linds.) Triebel (= <i>Arthonia glaucomania</i> var. <i>pallidiae</i> Rehm ex Almq., isoelectotype)	
M-0042626	<i>Opegrapha geographicola</i> (Arnold) Hafellner	
M-0043665	<i>Stigmidium gyrophorarum</i> (Arnold) D. Hawksw. (= <i>Arthopyrenia gyrophorarum</i> Arnold, holotype)	

At the bottom of the interface, there are fields for 'Display text' (loan form 2022-011) and 'Notes'.

DWB | DCollection – Statistics

Important!

- Quantitative transection overview
- Examples:
 - Collection administration
 - Transaction type
 - Units / package
 - ... and more!

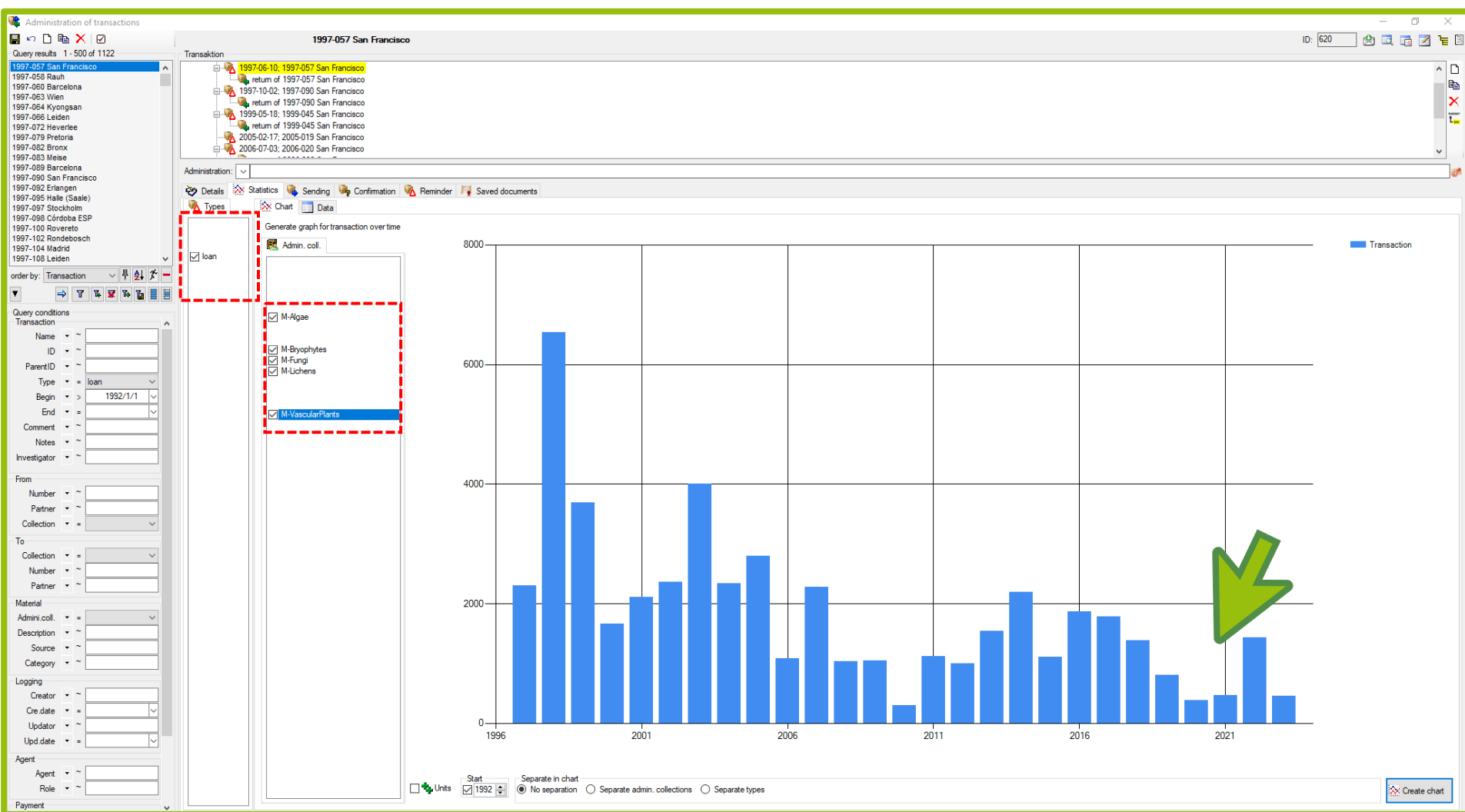


DWB | DCollection – Statistics

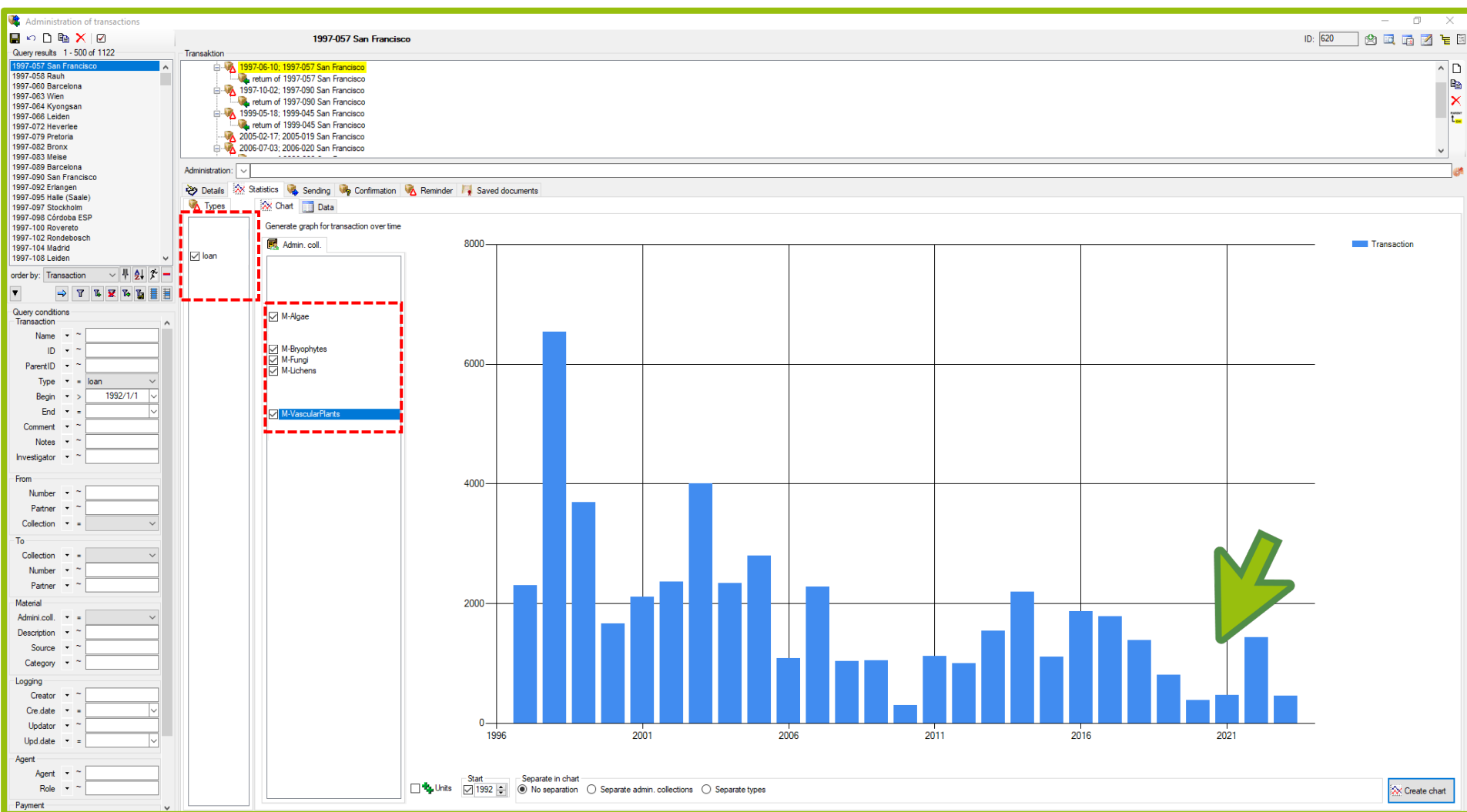
The screenshot displays the DiversityCollection v. 4.4.4 software interface. The main window shows a specimen record for *Solanum megaspermum* Agra. The interface is divided into several panels:

- Left Panel:** A sidebar with a tree view of collections and a list of specimen accession numbers (M-0000001 to M-0000014). Below this is a 'Query conditions' section with filters for 'Project', 'Presence', 'Project', and 'Creat. date'. Further down are fields for 'Collection specimen' (Acc. Nr., ID, Depositor, Dep. Acc. Nr., Ori. note, Withhold., Creat. by) and 'Collection event' (Presence, Date, Year, Locality, Loc. verb., Habitat, County). At the bottom are 'Place' fields (Loc. 1, Named area, Placeprese).
- Top Panel:** A menu bar with 'Connection', 'Grid', 'Query', 'Data', and 'Administration'. The 'Administration' menu is open, showing options like 'Analysis ...', 'Collections ...', 'Collection tasks ...', 'Tasks ...', 'Customize display ...', 'Database', 'External datasources ...', 'External identifier ...', 'Kiosk mode', 'Linked server ...', 'Material categories ...', 'Methods ...', 'Processing ...', 'Projects ...', 'Resources directory ...', 'Retrieval type ...', 'Site properties ...', 'Taxonomic groups', 'Transaction management', and 'Withhold. data ...'. A green arrow points to the 'Administration' menu.
- Center Panel:** A tree view showing the specimen record for *Solanum megaspermum* Agra. The 'Statistics ...' option is highlighted in blue, and a green arrow points to it. Other options include 'Transaction ...', 'Expired loans ...', 'Loan requestors ...', 'Collection managers ...', 'Collection users ...', 'Transfer to transaction ...', and 'Dismark, K. von'.
- Right Panel:** A form for specimen details. It includes fields for 'Type', 'IPR', 'EXIF', 'Title', 'Unit', 'Part', 'Type' (set to 'photograph'), and 'Note' (set to 'Test'). Below this is a 'Collection specimen' section with fields for 'Acc. Nr.' (M-0000001), 'Depositor' (SYSTAX), 'Dep. Acc. N.', 'Ext. ID' (6882), 'Acc. date', 'Suppl.', 'State', and 'Withhold.'. At the bottom right is a 'Notes' section with fields for 'Ori. note', 'Add. note', 'Int. note', and 'Problem'.

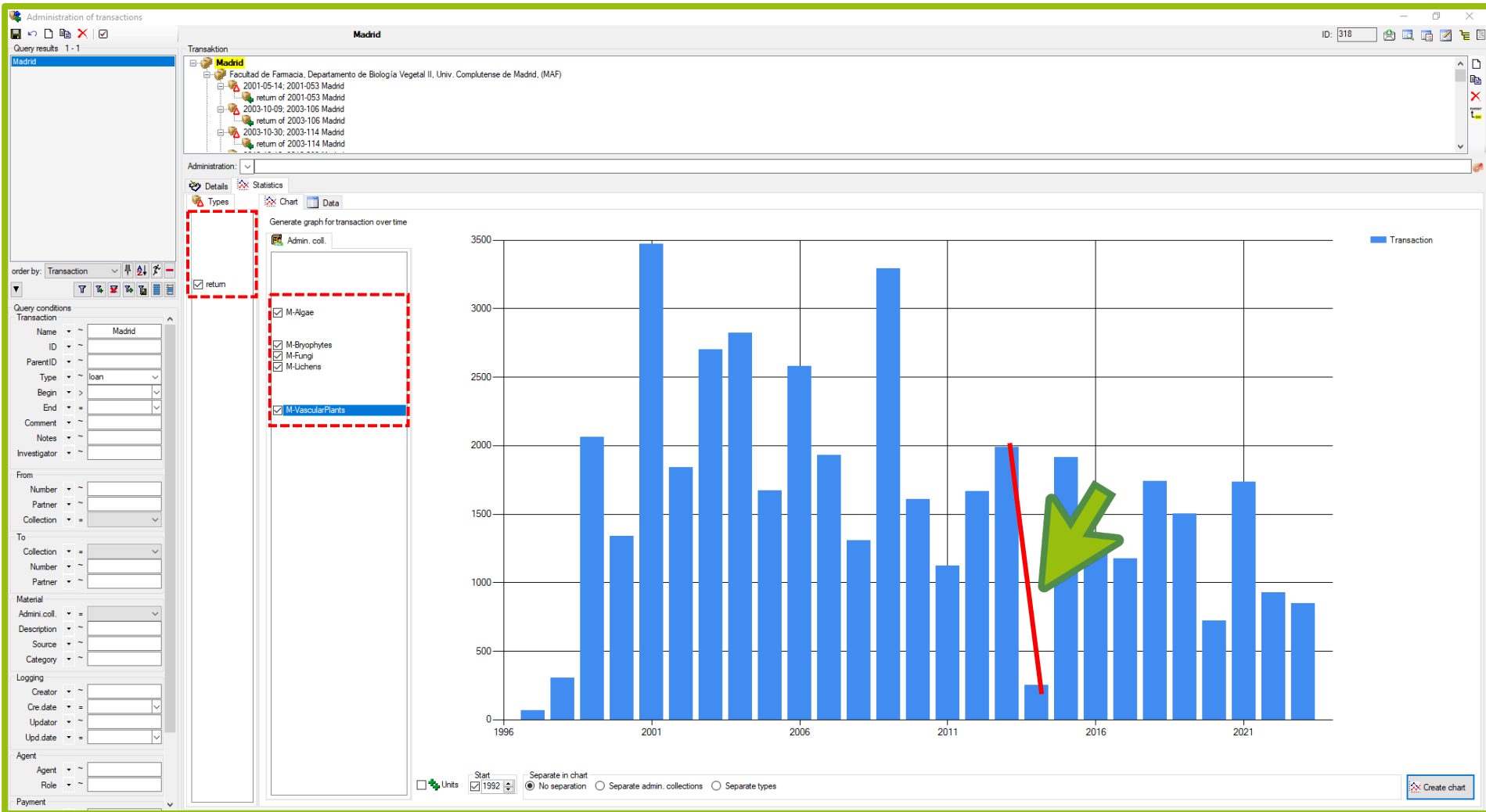
DWB | DCollection – Statistics



DWB | DCollection – Statistics

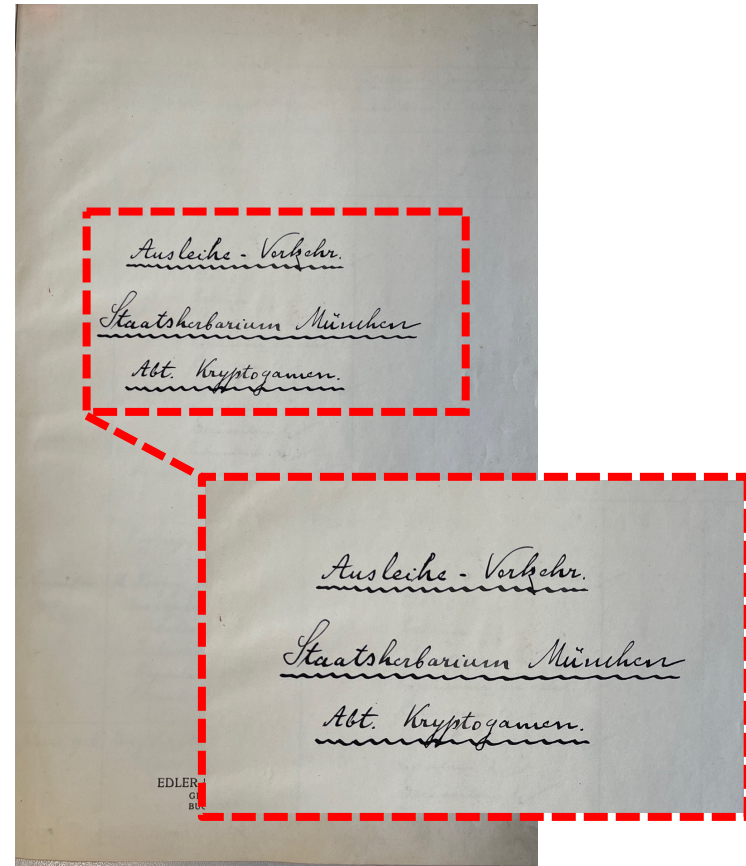
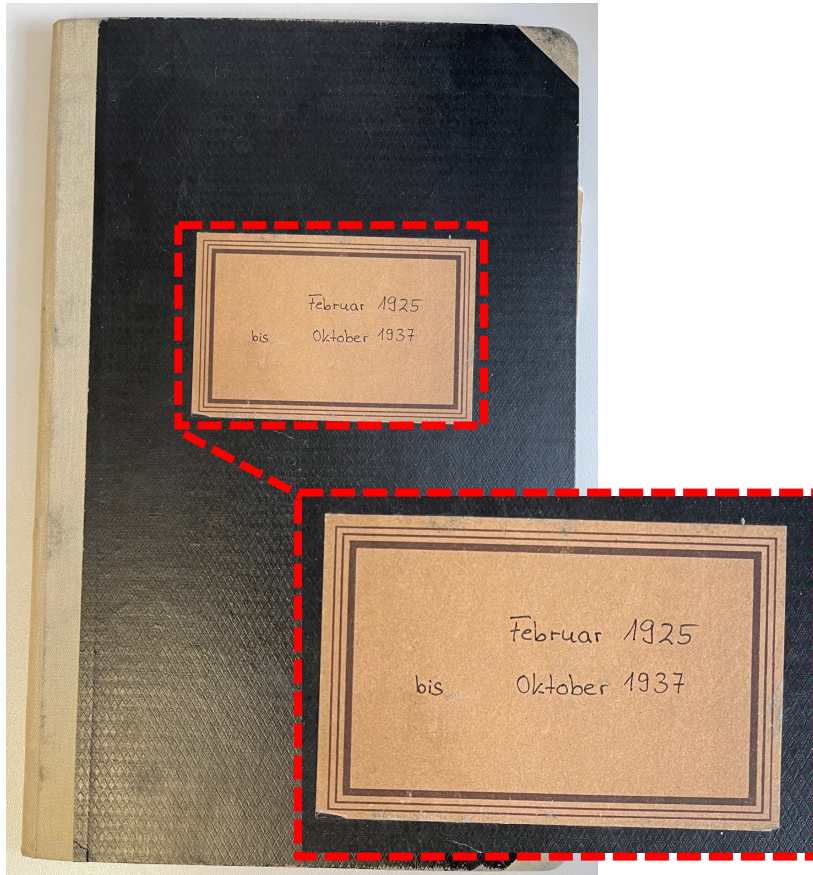


DWB | DCollection – Statistics



Bonus Track!

Analog Management – one of the oldest loan books (1925) !



THANK YOU FOR YOUR ATTENTION!

Dr. Carla Novoa Sepúlveda
Botanical State Collection Munich
Bavarian Natural History Collections

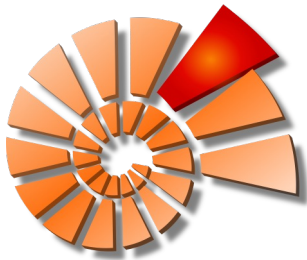
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Manual - DCollection

<https://www.diversityworkbench.de/manual/dwb/diversitycollection/index.html>

Manual - DAgents

<https://www.diversityworkbench.de/manual/dwb/diversityagents/index.html>