

# How to Batch Update Sample Metadata in SESAR

In this tutorial you will learn how to update sample metadata for multiple samples at one time in SESAR. Using batch update, you can update sample metadata for your previously registered samples in bulk, rather than one by one.

<http://www.geosamples.org>  
[info@geosamples.org](mailto:info@geosamples.org)

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ADVANCING OPEN AND FAIR SAMPLES IN THE EARTH, ENVIRONMENTAL, AND PLANETARY SCIENCES



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First, log in to MySESAR by clicking the link in the banner of the SESAR home page (<http://www.geosamples.org>).

# Editing sample metadata in MySESAR

MySESAR

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## Sample Edit

IGSN: IESER000C

Ready? Submit to SESAR

**Sample**

Select Type of Object: \* Individual Sample

Sample Sub Type: (View List)

Sample Name: \* SER DFT 6

**Access Permission**

Release Date: 2020-02-06

**Does the object have a parent?**

Enter Parent IGSN (if in SESAR)

**The parent is not in the system?**

Enter the object type of the external parent: -- select --

Enter the name of the external parent:

Description: copy from my samples

It is possible to edit sample information for existing samples on a one-by-one basis by going to the My Samples tab in MySESAR, and selecting “Edit” next to the sample you wish to edit. If you would like to edit many samples, we recommend that you use the batch update function instead (described in this tutorial).

# Why update sample metadata in bulk?

MySESAR

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## Sample Registration

### Individual Registration

Register an individual sample by selecting a sample type, then fill out the web form to register one sample at a time.

[Register An Individual Sample](#)

### Batch Registration

Register multiple samples by customizing and downloading a batch spreadsheet template. Please download one template per sample type using the Create a Batch File Template button below. Once you have completed the template, please upload it using the Upload a New Batch File button below. If you have questions while completing the template, please refer to the [SESAR QuickGuide](#) or contact us at [info@geosamples.org](mailto:info@geosamples.org).

We found an existing batch file that you uploaded, but did not submit to SESAR!

[Continue With Existing File](#)

[Create a Batch File Template](#)

If you downloaded your template before January 19th, 2018, you will need to download a new batch registration template. The new template allows you to specify a different release date for each sample. If no release dates are specified, sample metadata will be publicly accessible immediately (recommended).

[Upload a New Batch Registration File](#)

### Update Sample Metadata

Update sample metadata using batch template (same as used for batch registration). Use this option only if you are updating metadata for samples you have already registered, you must include the assigned IGSN for each sample. Please note that any existing metadata will be overwritten by what you submit here.

[Upload File to Update Sample Metadata](#)

Updating sample metadata in bulk rather than one sample at a time may be useful if you have a lot of samples you would like to update metadata for. This mechanism may also be useful if you want to pre-register samples prior to a sampling event. Some investigators do so in order to have IGSNs assigned to samples in the field. Since you may not have all the sample information prior to sampling (e.g., exact location and other details of collection and description), you can easily add additional metadata when you return from sampling by uploading a batch update template.

# Pre-registering Samples Before Fieldwork or Subsampling

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	<b>Object Type:</b>	<b>Core</b>	<b>User Code:</b>	<b>IESER</b>									
2	<b>Sample Name</b>	<b>IGSN</b>	<b>Parent IGSN</b>	<b>Release Date</b>	<b>Material</b>	<b>Field name (informal classification)</b>	<b>Classification</b>	<b>Sample description</b>	<b>Collection method</b>	<b>Comment</b>	<b>Purpose</b>	<b>Latitude</b>	<b>Longitude</b>
3	Sample 1	IESER0016		3/22/2020									
4	Sample 2	IESER0017		3/22/2020									
5	Sample 3	IESER0018		3/22/2020									
6	Sample 4	IESER0019		3/22/2020									
7													
8													
9													
10													

To pre-register samples before field work or subsampling, simply submit a batch registration template with minimal metadata for the number of samples you intend to collect. Above is a batch registration template where the investigator knew only that she would collect approximately 20 rock samples. The SESAR data manager returned this template to the investigator with the IGSNs pasted in. The investigator is now free to return to MySESAR to print labels to take out into the field. When she returns from the field, she can submit the same template with additional metadata filled in.

# Batch Updating Sample Info After fieldwork

Object Type:	Core	User Code:	IESER										
Sample Name	IGSN	Parent IGSN	Release Date	Material	Field name (informal classification)	Classification	Sample description	Collection method	Comment	Purpose	Latitude	Longitude	
DFT-1	IESER0016		3/22/2020	Rock		Igneous					41.0036	-73.9091	
DFT-2B	IESER0017		3/22/2020	Rock		Igneous					41.0036	-73.9091	
DFT-2	IESER0018		3/22/2020	Rock		Igneous					41.0036	-73.9091	
DFT-K	IESER0019		3/22/2020	Rock		Igneous					41.0036	-73.9091	

Preparing a template to batch update sample info is much the same as preparing a template to batch register samples. In fact, if you are updating metadata for samples that were registered in a single batch template, you can use the exact same template to update sample metadata. Or, you can download a new batch registration template from MySESAR. The important part is that the update template needs to include the IGSN for each sample, as well as the fields that you wish to update. In the above example, the values in red are those that the investigator would like to add to the existing samples profiles.

# Tips for Batch Updating Sample Metadata

Object Type:	Core	User Code:	IESER									
Sample Name	IGSN	Parent IGSN	Release Date	Material	Field name (informal classification)	Classification	Sample description	Collection method	Comment	Purpose	Latitude	Longitude
DFT-1	IESER0016		3/22/2020	Rock		Igneous					41.0036	-73.9091
DFT-2B	IESER0017		3/22/2020	Rock		Igneous					41.0036	-73.9091
DFT-2	IESER0018		3/22/2020	Rock		Igneous					41.0036	-73.9091
DFT-K	IESER0019		3/22/2020	Rock		Igneous					41.0036	-73.9091

1) Any fields you do not include in the template will not be updated and remain the same as when you registered the samples.

2) If you do include a field and do not fill it in, **any existing metadata for that field will be overwritten by the null values**. For example, if you had previously set the material to be Rock for a sample, but then upload a batch update template that contains the field “material” with no values filled in, the material will be changed to null.

3) You can change the release date for samples in bulk by submitting a batch update template where you change the dates in column D.

SESAR strongly recommends that sample metadata becomes public immediately upon sample registration or within two years of registration.

# How to Upload a Batch Update Template



MySESAR

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**Register An Individual Sample**

### Batch Registration

Register multiple samples by customizing and downloading a batch spreadsheet template. Please download one template per sample type using the Create a Batch File Template button below. Once you have completed the template, please upload it using the Upload a New Batch File button below. If you have questions while completing the template, please refer to the [SESAR QuickGuide](#) or contact us at [info@geosamples.org](mailto:info@geosamples.org).

We found an existing batch file that you uploaded, but did not submit to SESAR!

**Continue With Existing File**

**Create a Batch File Template**

If you downloaded your template before January 19th, 2018, you will need to download a new batch registration template. The new template allows you to specify a different release date for each sample. If no release dates are specified, sample metadata will be publicly accessible immediately (recommended).

**Upload a New Batch Registration File**

### Update Sample Metadata

Update sample metadata using batch template (same as used for batch registration). Use this option only if you are updating metadata for samples you have already registered, you must include the assigned IGSN for each sample. Please note that any existing metadata will be overwritten by what you submit here.

**Upload File to Update Sample Metadata**



After preparing your batch update template, please go to the Register/Update Samples tab in MySESAR and select “Upload File to Update Sample Metadata.”



# Upload your Batch Update Template

MySESAR

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## Update Sample Metadata

Only batch registration templates in Excel (xls) format will be accepted. Please use the [template creator](#) to generate a template. Only one file can be uploaded at a time.

If you downloaded your template before January 19th, 2018, you will need to download a new batch registration template.

my\_sesar\_batch\_samples.xls

Add file Upload Clean

<< Back to Sample Registration

You will then be prompted to upload your batch update template by first clicking “Add File” and then “Upload.”

# How to Batch Update Sample Info: Grid Preview

MySESAR


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## Update Sample Metadata

Object Type: Core

Sample Name	IGSN	Parent IGSN	Release Date	Material	Field name (informal classification)	Classification	Sample description	Coll
DFT-1	IESER0001			Rock		Igneous		
DFT-2B	IESER0002			Rock		Igneous		
DFT-2	IESER0003			Rock		Igneous		
DFT-K	IESER0004			Rock		Igneous		

[Upload New File](#) [Download as Excel](#) [View Locations on Map](#) [Update Now](#)



Once you have uploaded your batch update template, you will see the grid preview (just like batch registration). If there are any issues with your batch, SESAR will display error messages in red and underline the cells in question. If there are errors, please make the appropriate modifications inside the template and re-upload it. Once there are no errors and you are satisfied with what you see, please select “Update Now.”

# Upload your Batch Update Template

MySESAR

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Sample [DFT-1] with IGSN [IESER0001] was updated successfully.

Sample [DFT-2B] with IGSN [IESER0002] was updated successfully.

Sample [DFT-2] with IGSN [IESER0003] was updated successfully.


Sample [DFT-K] with IGSN [IESER0004] was updated successfully.

After you click “Upload Now”, you should see a series of success messages, one for each sample in your batch update template.

# Batch Update

## Before

IGSN: IESER0001



IGSN: IESER0001  
Sample Name: Sample Name 1  
Other Name(s):  
Sample Type: Core  
Parent IGSN: Not Provided



**Description**


Material: Not Provided  
Classification: Not Provided  
Field Name: Not Provided  
Description: Not Provided  
Age (min): Not Provided  
Age (max): Not Provided  
Collection Method: Not Provided  
Collection Method Description: Not Provided  
Size: Not Provided  
Geological Age: Not Provided  
Geological Unit: Not Provided  
Comment: Not Provided  
Purpose: Not Provided

**Geolocation**

Latitude (WGS84): Not Provided  
Longitude (WGS84): Not Provided  
Northing (m) (UTM NAD83): Not Provided  
Easting (m) (UTM NAD83): Not Provided  
Zone: Not Provided  
Vertical Datum: Not Provided  
Elevation Start: Not Provided  
Elevation End: Not Provided  
Nav Type: Not Provided  
Physiographic Feature: Not Provided  
Name Of Physiographic Feature: Not Provided  
Location Description: Not Provided  
Locality: Not Provided  
Locality Description: Not Provided  
Country: Not Provided  
State/Province: Not Provided  
County: Not Provided  
City: Not Provided

## After

IGSN: IESER0001  



IGSN: IESER0001  
Sample Name: DFT-1  
Other Name(s):  
Sample Type: Core  
Parent IGSN: Not Provided

**Description**

Material: Rock  
Classification: Igneous  
Field Name: Not Provided  
Description: Not Provided  
Age (min): Not Provided  
Age (max): Not Provided  
Collection Method: Not Provided  
Collection Method Description: Not Provided  
Size: Not Provided  
Geological Age: Not Provided  
Geological Unit: Not Provided  
Comment: Not Provided  
Purpose: Not Provided

**Geolocation**

Latitude (WGS84): 41.0036  
Longitude (WGS84): -73.9091  
Northing (m) (UTM NAD83): Not Provided  
Easting (m) (UTM NAD83): Not Provided  
Zone: Not Provided  
Vertical Datum: Not Provided  
Elevation Start: Not Provided  
Elevation End: Not Provided  
Nav Type: Not Provided  
Physiographic Feature: Not Provided  
Name Of Physiographic Feature: Not Provided  
Location Description: Not Provided  
Locality: Not Provided  
Locality Description: Not Provided  
Country: Not Provided  
State/Province: Not Provided  
County: Not Provided  
City: Not Provided

The sample profile on the left represents an initial sample registration with minimal sample metadata (perhaps prior to sample collection), while the right image shows the sample information for the same sample after updating sample metadata (including sample name, classification, sample description, and latitude and longitude) using the batch update mechanism.

## Questions? Contact us!

If you have additional questions, please feel free to contact us at [info@geosamples.org](mailto:info@geosamples.org) or visit our help pages and other tutorials at <http://www.geosamples.org/help>.