A guide to using iRecord

Steve Garland – (v3.0) - May 2019

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CHAPTER ONE

WHY iRECORD?

Wildlife recording can be a fascinating and rewarding activity. iRecord can not only make wildlife recording even more enjoyable but can also make your recording efforts become much more worthwhile. Biological recording is not just about having fun, as good quality biological records are essential to inform everything from planning decisions to political policy to scientific research and practical wildlife conservation. At its most fundamental level wildlife records are collected on paper or in digital form such as a spreadsheet. It's all too easy for the records to get forgotten about and left exactly where they are; the records are then not available for anything. By using an online recording system like iRecord you can easily:

- Share your sightings with the recording community
- Explore dynamic maps and graphs of your data
- Ensure that your records are available to appropriate organisations and therefore make a real contribution to science and conservation.

Online wildlife recording presents lots of new opportunities:

- Sharing records is simplified to the point that the recorder need not actually do anything other than add their records to the system. Records can be easily shared with other recorders, local record centres and the NBN Gateway. Software and checklists are updated by the system, with no action required from the recorder.
- By sharing our records, we can learn from the experiences of others such as what is being recorded on our patch by others, what identifications are being verified by experts and so forth.
- By sharing our records, we can get rapid feedback from experts and other recorders on record quality issues.
- By sharing our records, we can ensure our records are of maximum value and not just known only to ourselves.

Tip: iRecord's philosophy is that sharing of non-sensitive records is a fundamental part of wildlife recording. In fact, unless there are sensitivity issues relating to a record iRecord makes records available for public interest and to support nature conservation. iRecord is not the right tool for you if you want to keep a private list of records!

There are a number of YouTube videos showing how to 'do' iRecord. Go to YouTube and search for something like 'iRecord biological recording'. A simple search on iRecord will unfortunately bring up lots of videos on a sound-recording app with the same name! However, remember that iRecord does get updated, so some may have dated!

CHAPTER TWO

USING TRAINING MODE IN iRECORD

Register on iRecord

Before starting any work using iRecord, make sure that you have registered a user account and can log in. You can do this via the links from the iRecord home page.

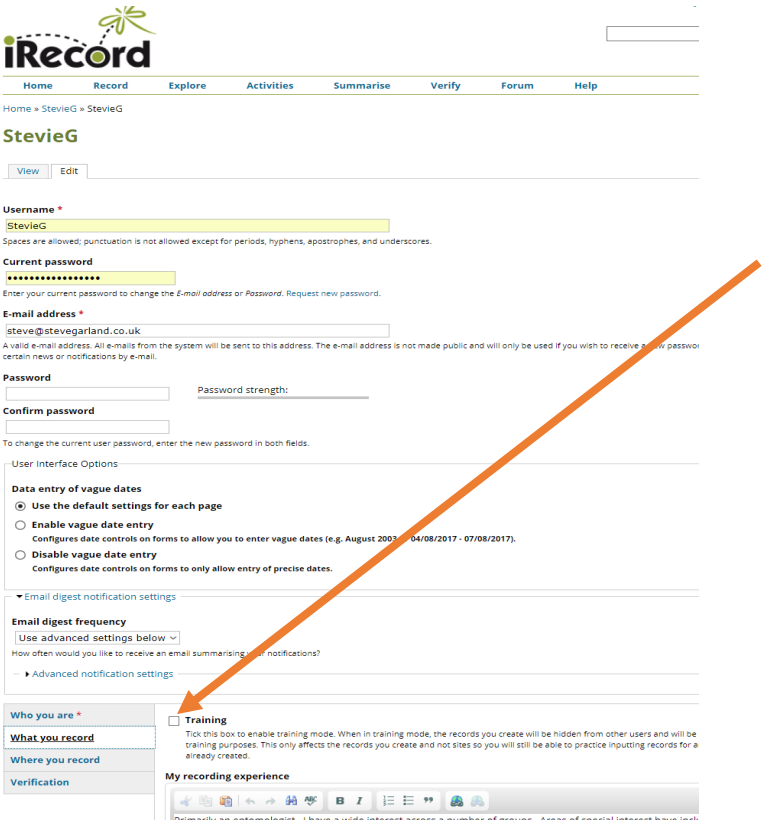
Whilst learning iRecord, you will want to go through the steps of actually submitting records into the system and seeing the results. If you are concerned about putting records into iRecord whilst you are still learning the basics then don't worry as iRecord supports a training mode. Whilst in training mode:

- the records you add are flagged as training records so they won't be sent on to experts, local environmental record centres or the NBN Gateway.
- training records are hidden from view for all users of iRecord unless they are also in training mode.

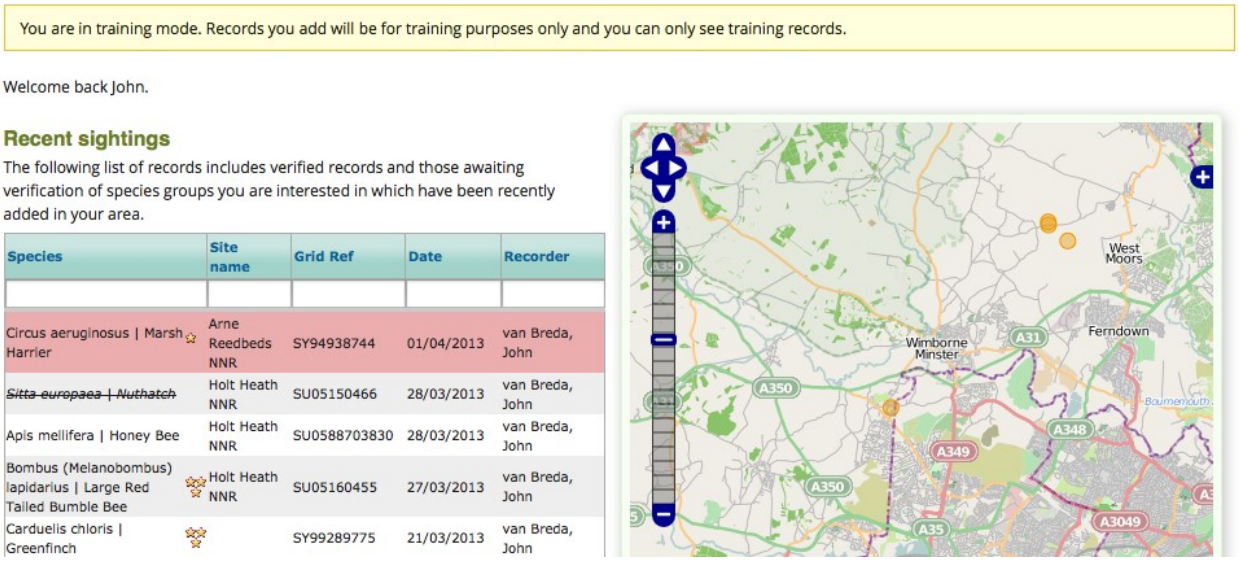
To enable training mode, follow these steps:

1. Click **My Account** from the link in the top right of the screen.
2. Click on the **Edit** tab.
3. Click on the **Preferences** tab.
4. Scroll down to the 'Who you are' box and click on **'What you record'**
5. Tick the checkbox next to **'Training'**.
6. Scroll to the bottom and click the **'Save'** button.

The following screenshot shows the My Account link, Edit tab, What you record tab and Training checkbox:



Once you are in training mode, you will find that a message is displayed at the top of each page warning you. You can see from the following screenshot example that the records visible on the home page were those which were previously input whilst in training mode.



Don't forget to <u>unset</u> the training option when you want to start inputting live records! When you do this, your training records will remain in the system but will be hidden from your view until you choose to return to training mode.

CHAPTER THREE

WHERE DOES THE RECORD GO?

One of the big benefits of iRecord over written records and some other computerised recording systems is in relation to where your records go after you submit them. Many recorders are motivated to record wildlife because they want to ensure that records are available to decision makers, planning authorities, scientists, recording schemes and societies. Records on paper need considerable effort to get them into a form where they can be utilised. Even records in spreadsheets take considerable effort to import them into the databases used to collate records, since species names and other terms all need to be matched with the correct equivalents in the database. This might sound trivial but don't forget that many species names are not unique; a redshank is a plant *or* a bird for example. A combination of the effort required to process records and the lack of awareness of the importance of collating records means that many records remain exactly where they started out - on paper or on a spreadsheet. This is even true of many records collected from that most modern of recording phenomena, the bioblitz; the effort required to mobilise the data is often considered not worth it. Of course that's not to say that we shouldn't hold events purely with the aim of public engagement, but with iRecord we hope to make mobilising records much easier so there are no good reasons not to.

iRecord helps you to match species names correctly at the point of data entry by showing you the common name, latin name and species group when you pick a name, so issues with matching names are no longer a factor. The record is immediately in digital form with correctly input grid references picked from a map, no ambiguity in the way dates are written and so forth. Therefore fully utilising the records which are input into iRecord becomes much simpler. Creating an accurate record right from the outset is only part of the story, so lets take a look at what else happens next behind the scenes.

The Database

All records added to iRecord go straight into a database hosted by the Biological Records Centre known as the *community warehouse*. This name reflects the fact that the database is shared with a community of other online recording websites for reasons which we will come to later. The records are held securely and are regularly backed up.

Records are immediately available

All non-sensitive records added to iRecord are immediately available for browsing on the Explore pages of the website. Local environmental records centres have instant access to records, to ensure that they are not overlooked in the local planning process while they are waiting for verification. Of course, a record needs to be verified before it is used as evidence for decision making, but instant access to unverified records can help ensure that important species and habitats are not harmed due to lack of awareness of their presence.

Automated checks

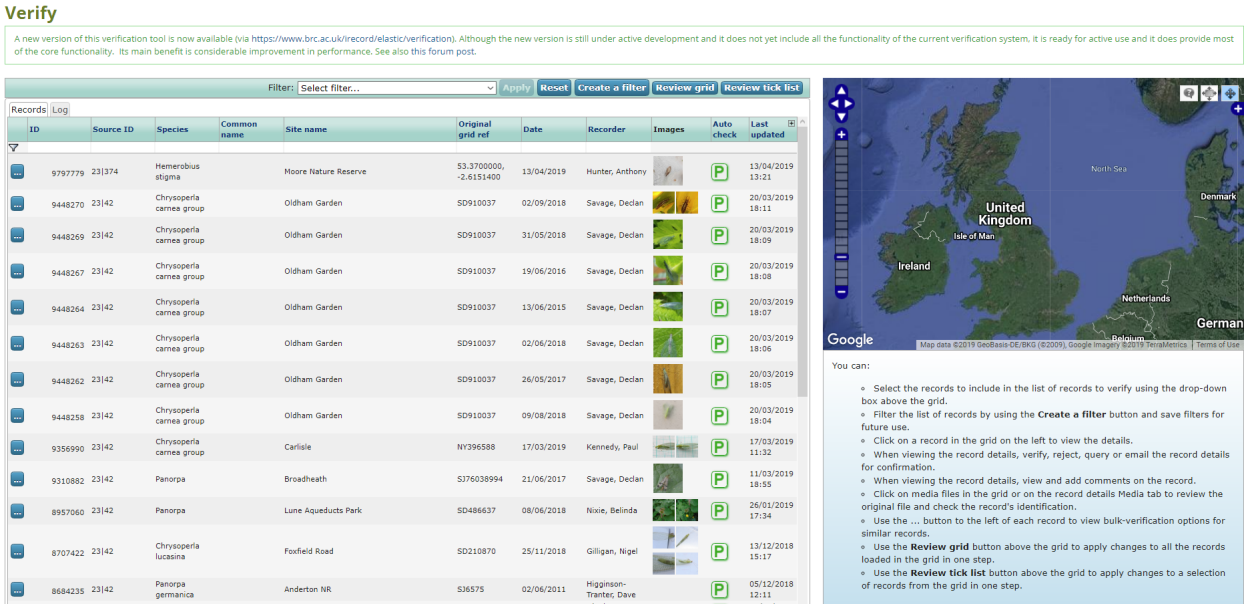
Records added to the database are subjected to a number of automated checks. For example, if a record is outside the expected distribution of the species or at an unexpected time of year, then a flag is added to the record marking it as such. These flags shouldn't be considered as an indication of a "bad" record though - a record which is outside the known distribution is exactly the sort of record which can show the movement of a population if enough evidence is available to verify the record.

The rules used for the automated checks are based on criteria originally developed by the national recording schemes for the NBN Record Cleaner software, which was designed to highlight records that fall outside normal patterns of distribution or time periods. As new records are verified within iRecord, the system 'learns' so that if a new species gets verified several times from a new area, it no longer triggers an 'out-of-range' warning.

Expert Verification

The next, critical step in the journey of the record is a review by an expert. Only expert verified records can be used as evidence in planning enquiries, species atlases etc. That doesn't mean a record that cannot be verified is not useful; even if it only gives guidance for further professional surveying - every record is valuable.

Experts have access to a list of the records pending verification, which is filtered to their region and taxonomic speciality as appropriate. They also have tools to quickly verify records (for example you can verify *en masse* all records of common, easily identified bird species by trusted recorders). Photos uploaded with records are often a great help in verifying records of some species groups but in many cases the expert needs to contact the recorder to check further details or to ask if a specimen is available. iRecord's verification system includes tools to make all these tasks as simple as possible for the expert so that they can concentrate on the important task of checking through the records.

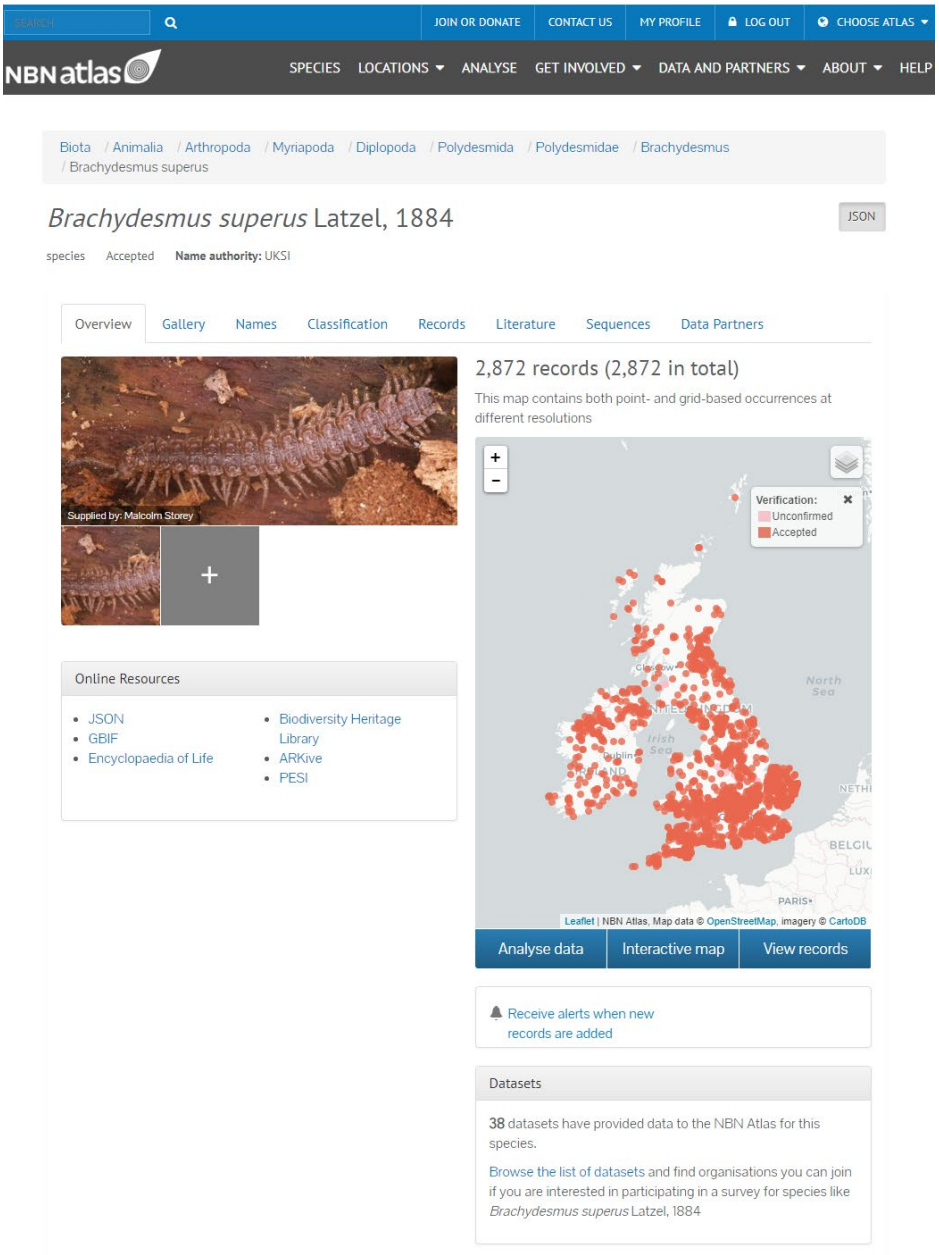


The above screenshot shows the verification system in iRecord. Notice how the verifier is able to verify records from multiple places from a single screen - in this case a page of Neuroptera awaiting verification by me.

Chapter 20 has some further notes on Verification.

Records are passed to the NBN Atlas

The NBN Atlas is the UK's portal for exploring biodiversity data, a *node* of the Global Biodiversity Information Framework (GBIF). Verified records from iRecord may be shared via the NBN Atlas. The decision to do so lies with individual national recording schemes, although most do upload data. From there, the records are made available to a number of other websites via NBN web services, and to an international audience via GBIF.



Records added to iRecord will be made available to national recording schemes and their verifiers, and to local records centres, conservation organisations, natural history societies and others with legitimate interest in the data. Wherever possible records will also be shared via the NBN Atlas, through the relevant national recording scheme.

CHAPTER FOUR

MY ACCOUNT

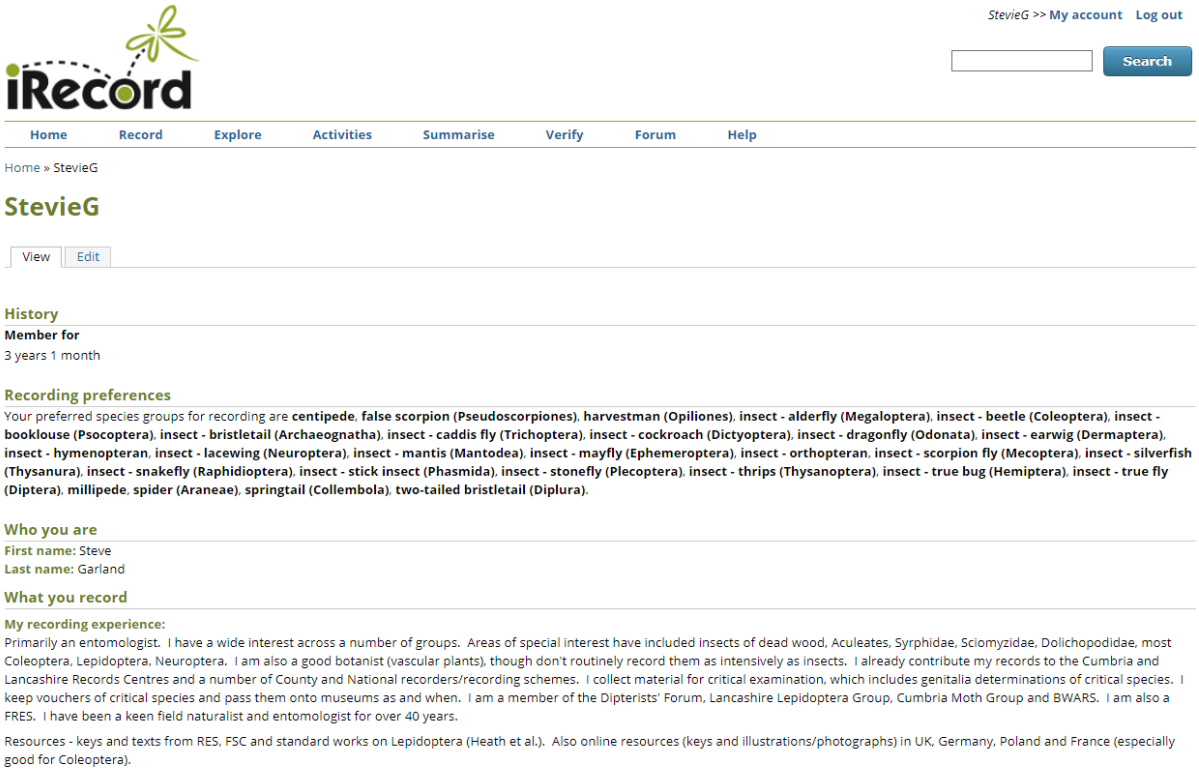
iRecord allows you to customise several aspects including the species groups you like to record most often and the region, county or area you most often record in. These are then used to customise reports and can also be used to simplify data entry or to bring to your attention any recording forms which might be of interest, so it's worth spending a few moments familiarising yourself with the possibilities.

To access your account, click on the **My Account** link in the top right of any page.

The My Account section is divided into 2 tabs as follows:

View Tab

The View tab shows a summary of your settings, for example:



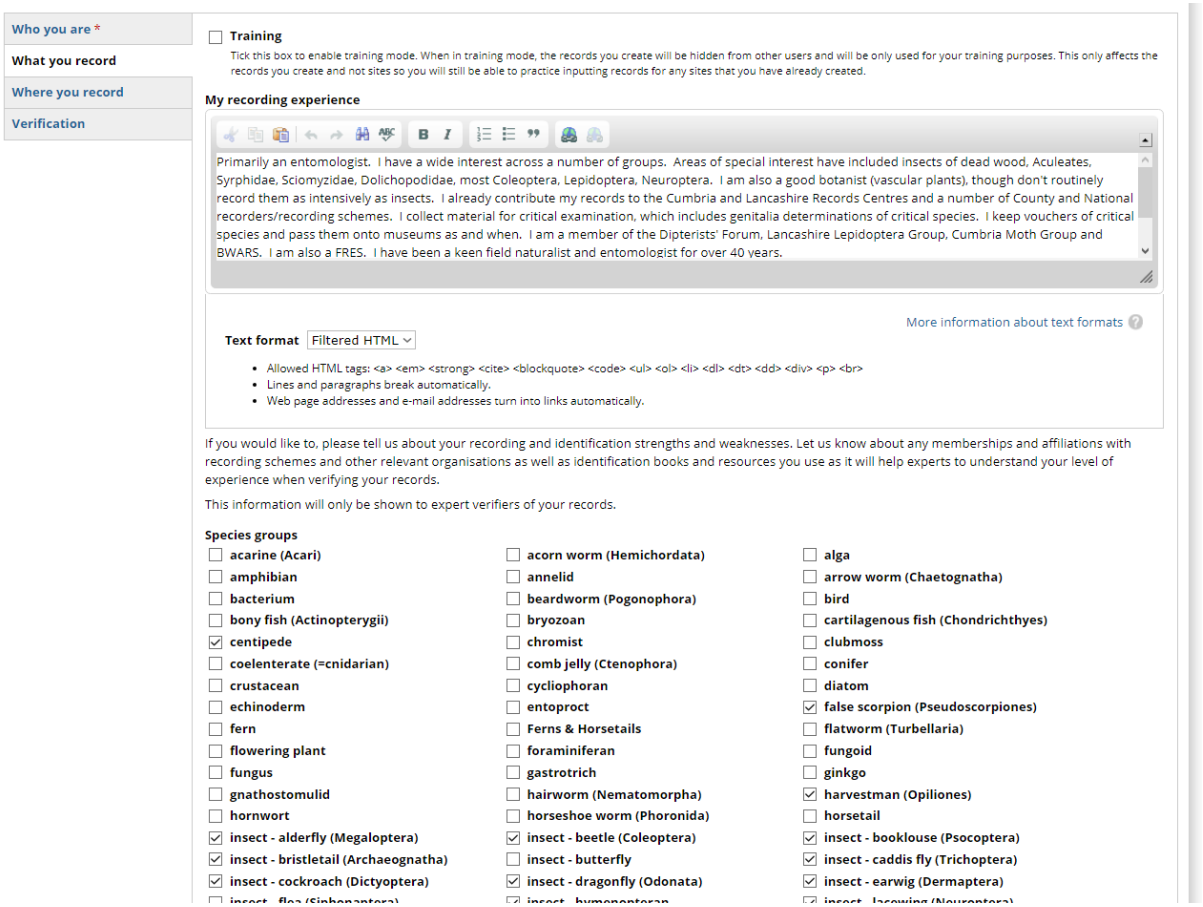
Note on this tab the section called Recording Preferences which tells you what you're mostly interested in. There's more about this in later chapters.

Edit Tab

The Edit tab allows you to change your Log In password and to set your account to allow vague dates (such as 'July 2019' or '04/08/2018-10/18/2018', which are not allowed by default.

You can also set the frequency that you receive emails with your notifications. Notifications are mentioned under Verification.

The Edit Tab is divided into 4 further sub-tabs. The first one is **'Who you are'** which just allows you to change your name. The important one is called '**What you record'**:



On the 'What you record' tab you can set the species groups you are most interested in. Tick all those you regularly record. You can change these at any time later.

The third one is **'Where you record'** where you can select a Vice County where you usually record. When you open iRecord you will find that the map is centred on this area.

Note that the list of locations available to pick from uses the list of *Watsonian Vice Counties* (https://www.brc.ac.uk/article/british-vice-counties). These are often used in biological recording since they are persistent and not subject to the changes that our list of administrative areas are subject to.

When you have set the options remember to click the Save button at the bottom of the page.

CHAPTER FIVE

GENERAL PURPOSE DATA ENTRY FORMS - 1

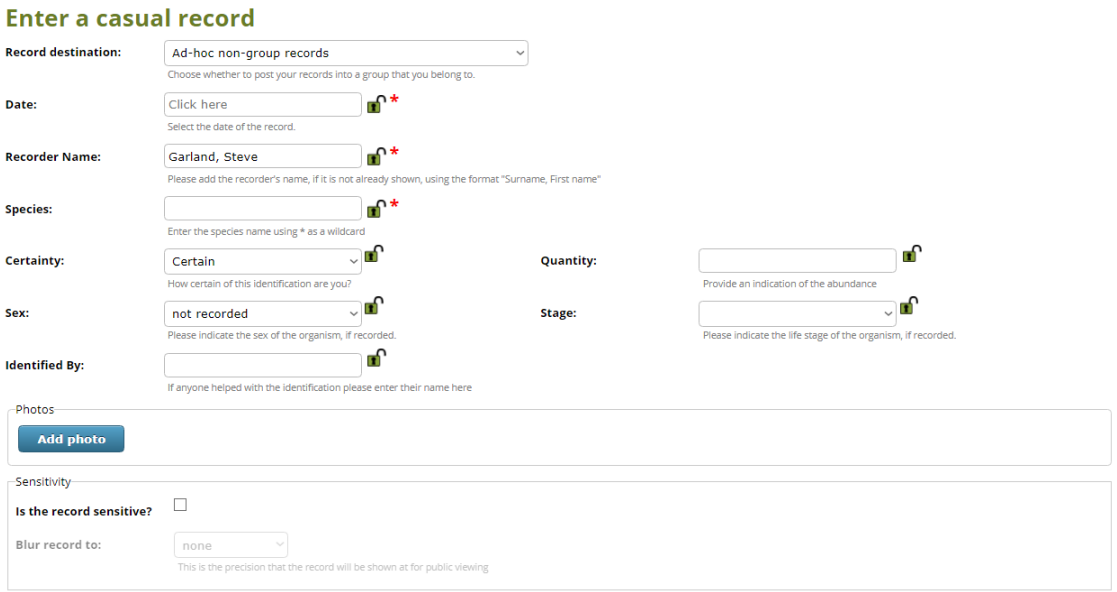
Enter a casual record

To add a record:

1. **<u>First make sure you are logged in and NOT in Training Mode if you wish to save real records.</u> (Note: you can use these forms in Training Mode to try them out, but records will not be made available outside training mode.**

2. Select **Record > Enter a casual record** from the main menu. This takes you to the form for general ad-hoc records. There are other forms for lists of records as well as forms catering for specific surveys, species groups and places which we will learn about later. The top half of this form allows you to set most details of the record other than the locality information.

   The screen displays a number of boxes for data. Five of these have a red asterisk (*) next to them. These MUST be filled in or you won't be allowed to save the record. All of the rest are optional, although the more you can complete, the greater the value of your record.



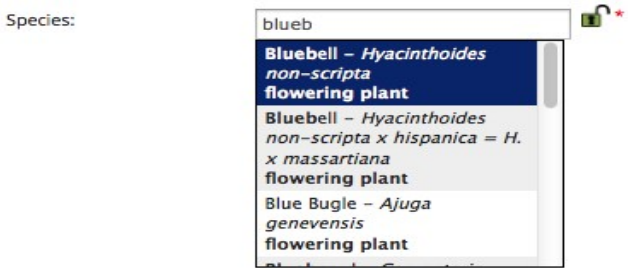
3. **Record destination –** The default is 'Ad-hoc non-group records. If you create or join Activities (see later section) they will appear here as drop-down choices**.**

4. **Date.** Click in the box beside the Date label and you will see that a calendar panel pops down making it really easy to simply click on the correct date. If you need previous months or years then you can use the controls at the top of the panel to change the visible month. Obviously future dates are not allowed. You can also type in a date directly in the format dd/mm/yyyy – often the easiest way when entering records from previous years, or old collections/notebooks.

So, click on today's date to set the date for the record.

5. **Recorder name**. The Recorder Name field will already have been filled in with your name as a default value. If you are entering a record made by someone else, you must add their name here, in the format Surname, Forename.

6. **Species.** Click in the box next to the Species label. Start typing the first few characters of a species name, e.g. "blueb" to search for Bluebell, *Hyacinthoides non-scripta*. The list of possible matched species names appears below the input box:



If the species you are looking for has come to the top of the box then simply press return, or click on with mouse, to select it, or you can use the arrow keys to navigate in the list then press return when the species you want is highlighted. If the list is a long one then and your name hasn't appeared, scroll to the bottom and it may say **More available…** so click on this to see more choices. More ways of entering this are in Chapter 8.

7. **Certainty**. Although most records are put on iRecord with a relatively high degree of confidence in the identifications, there are many reasons why iRecord should accept less than certain records. These can be Certain, Likely or Uncertain.

    a Uncertain records can still act as a pointer to others who may want to confirm the record themselves.

    b An uncertain record as determined by the recorder might be accompanied by enough information for the record to be verified by an expert.

    c Most recorders like to keep all their records for the sake of completeness, not to have to discard the ones that they cannot be 100% certain of. This is especially important to the newcomer recorder who might one day be the expert verifying my records.

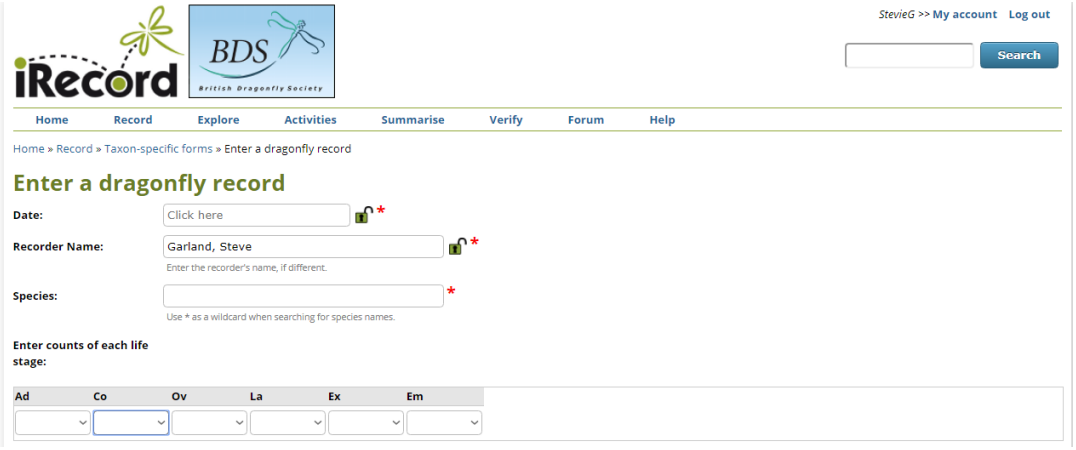
Therefore, always set the certainty of your record's identification as it ensures that the record is not misinterpreted or misused. It may also flag up a record for closer attention from a Verifier

8. **Quantity**. This category is free text. Examples include: 1, 2-5, abundant, several, large flock, one clump…

9. **Sex**. Drop-down – male, female, mixed.

10. **Stage**. Drop-down. On this simple form the choices are restricted to: adult, pre-adult or not recorded. For animals (including insects) it is very helpful to say if you are recording an adult or not, but for plants the 'not recorded' option is the only relevant one. Again, this is a general-purpose form and this field may not be appropriate to all records, but where possible set the stage of the organism if you can.

    Note that iRecord does support more specialist recording forms, e.g. the British Dragonfly Society's survey recording form, where the list of options is more specific including Adult, Copulating, Ovipositing, Larva, Exuvia etc.



11. **Identified By**. -Knowledge of who identified a record is a really important piece of information when verifying records. If someone else identified your record for you, this is where you put their name.

12. **Add photo** – See Chapter 9

13. **Is the record sensitive** – **All** records are available to **all** users of iRecord. There is a tiny risk that some people with harmful motives may access data and misuse it. Some records, for example badger setts or rare bird nest-sites may be best kept from public access. To this end iRecord lets you BLUR your data for the public. However, data blurred in this way causes problems with mapping and data extraction, so is best avoided. For example, the record will appear in reports for any site the 10km or 100km square overlaps with. If your data is really that sensitive, iRecord is probably not the best place to put the record. If you do use this blur option, try to keep it at as detailed a level as possible to avoid causing problems.

14. **Location**. Type in the site name where you recorded the species, or a brief description of the site. If you have created sites or added NNRs as **My Sites**, as you start to type their name, they will appear in a drop-down box. If your site is not in **My Sites**, after you enter or select a Spatial reference a button to the right of the Location will offer the option to **Remember site**. If you click this the site and grid reference will be saved and will appear in future as you start to type the name. This can be helpful if you decide to add it to **My Sites** later.

15. **Spatial reference**. – This is detailed information on the place. You can enter a grid reference, latitude and longitude, Irish Grid Reference or Channel Islands Grid Reference. The quickest way to do this is usually to scroll down the page till you can see the map, then move the mouse over the map to the general area of the record. As you hover over the map, you can see a dotted outline of the grid square which you are currently over informing you where the grid square will be set when you click. If you are using a saved Site, the site will already appear in your map window, making things even easier.

Double-click or use Ctrl + mouse-wheel and the map will zoom in so that you can click again to set a more precise grid reference. Do this until your grid reference is placed to an appropriate level of precision. A 10m grid square is a good aim if you can be that accurate!

You can also type in the grid reference or Lat/Long directly.

16. **Habitat –** This is a hierarchical drop-down list of habitats. However, it is quite basic and, in many cases, I find that it does not provide a useful or relevant category for my recording. You can always add something descriptive to the Comment box.

    NOTE/WARNING – ***The habitat box can be quite annoying when you are using sites you have created. iRecord will remember the habitat that you chose when you entered the last record for the site. This is something you can miss if you haven't any habitat data for a subsequent record. I know I miss it sometimes because I don't often enter anything here so I can end up with 'bogs and fens' on a limestone hill if a big site has varied habitats!***

17. **Comment –** A free-text box to add anything that may add value to the record. Another important use is to add information that may help the expert Verifier to ascertain the accuracy of your identification by explaining HOW you identified it. For example, it might say a specimen was observed microscopically, was dissected or that a voucher has been kept if needed. You can also mention the identification key or book used, which may help considerably.

18. **Finally, click the Submit button to save your record.**

Important Note – Don't hit the enter key until you are sure you have finished as that will SUBMIT the record.

CHAPTER SIX

GENERAL PURPOSE DATA ENTRY FORMS - 2

Enter a list of records

This form is designed for quickly entering a list of records that were collected at the same place, on the same date, by the same person. Each record added on the Enter a List of Records data entry form has exactly the same information as the **Enter a Casual Record** form. The big difference is that you only input information about the visit once and you use a grid to enter a list of all the records that share the same visit information. Another difference is that the form is **divided onto 2 tabs**, with information about the place you visited on the second Where Was It? tab.

Entering the date, recorder name and visited place information is exactly like entering these details on the **Enter a Casual Record** form. However, the species input grid is different:

Inputting records is simply a matter of typing species names into the first, Species column. This matches the text you input against the list of known species names, exactly as when you are inputting a single record. Once you have input a species name, a new row is added to the bottom of the grid letting you continue adding more species records. When you add a row to the grid for a species record, you can also set the following attributes of the record: • Certainty

- Quantity
- Sex
- Stage
- Identified By
- Comment – There is still an **Overall comment** box at the end – for example if all records were from an MV trap it could go there. The comment box next to each record allows for specific comments on habitat, Identification process etc relating only to that one record.
- Images (Photos) See Chapter 9

The locality data is on a separate tab/page 'Where was it?'. Once you click on this tab, you can't return to your species list until you have put data in all the essential (red *) fields.

USEFUL NOTE – If you want to add more records from this sample later, find one of the records and click the Edit icon. Then below the record you will see 'View all the records in this sample or add more records' – click this and you can then add more without having to add dates, site data or other shared information.

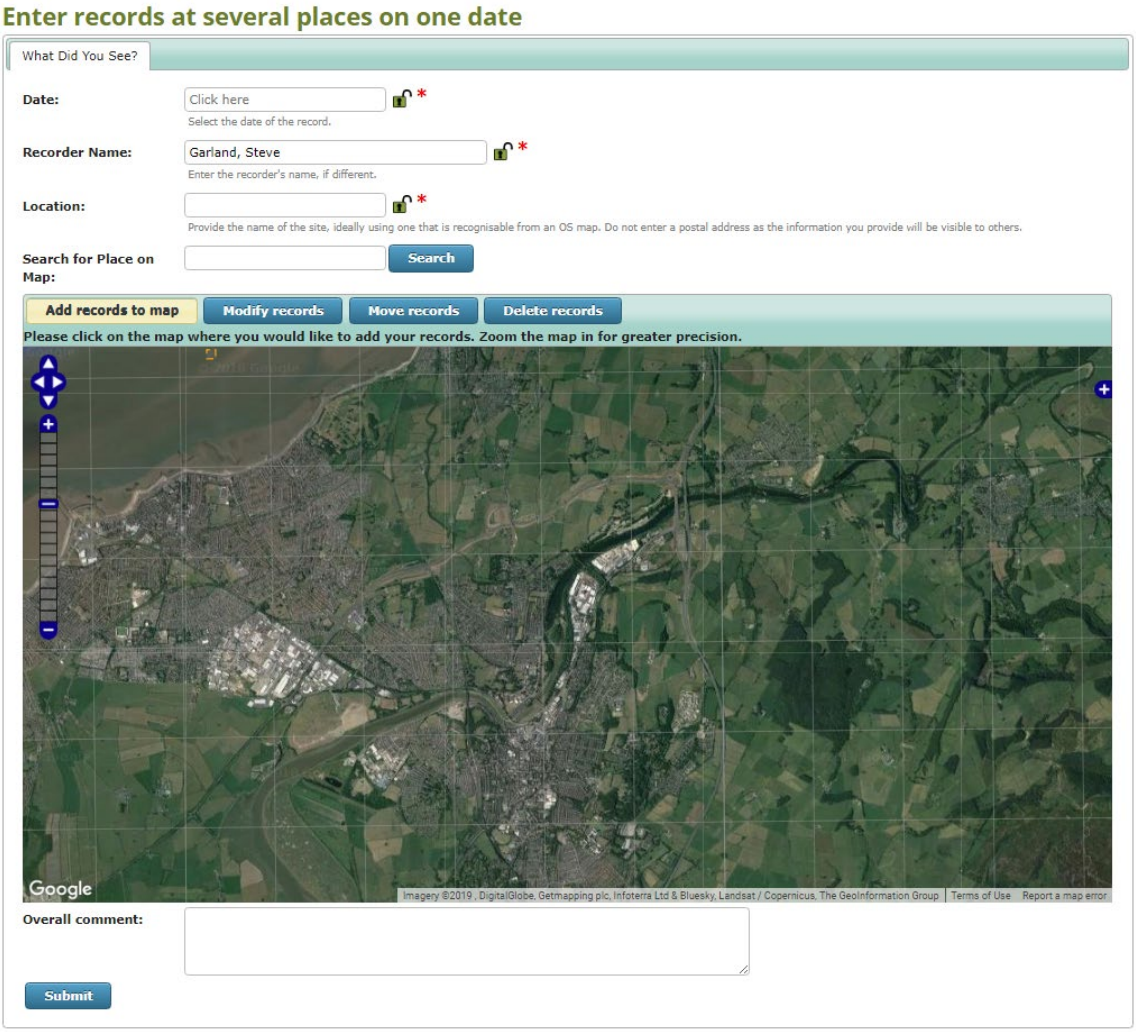
CHAPTER SEVEN

GENERAL PURPOSE DATA ENTRY FORMS - 3

Enter records at several places

Although entering a list of records from one place on one day can be a quick way of inputting lists of records, most recording trips involve records from more than one grid square. The Enter Records at Several Places form is designed to handle this quickly and efficiently - you can add a number of grid squares to a map and enter any number of records you like at each grid square.

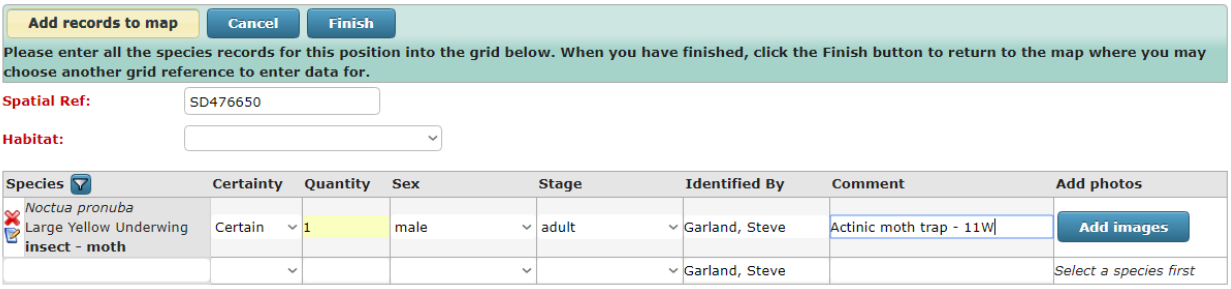
Select **Record** > **Enter records at several places** from the menu. This form allows you to easily add records for multiple grid squares. Find the right place on the map, by selecting Google satellite using the layer picker on the map (the blue cross button near the top right of the map).



Use the zoom bar on the left of the map to zoom out or in and you can drag the map around using the mouse.
You can use the pan and zoom controls on the map to zoom in.
Select a grid square to input records; the map will slide out of view to be replaced by a grid allowing input of the records at this grid reference.

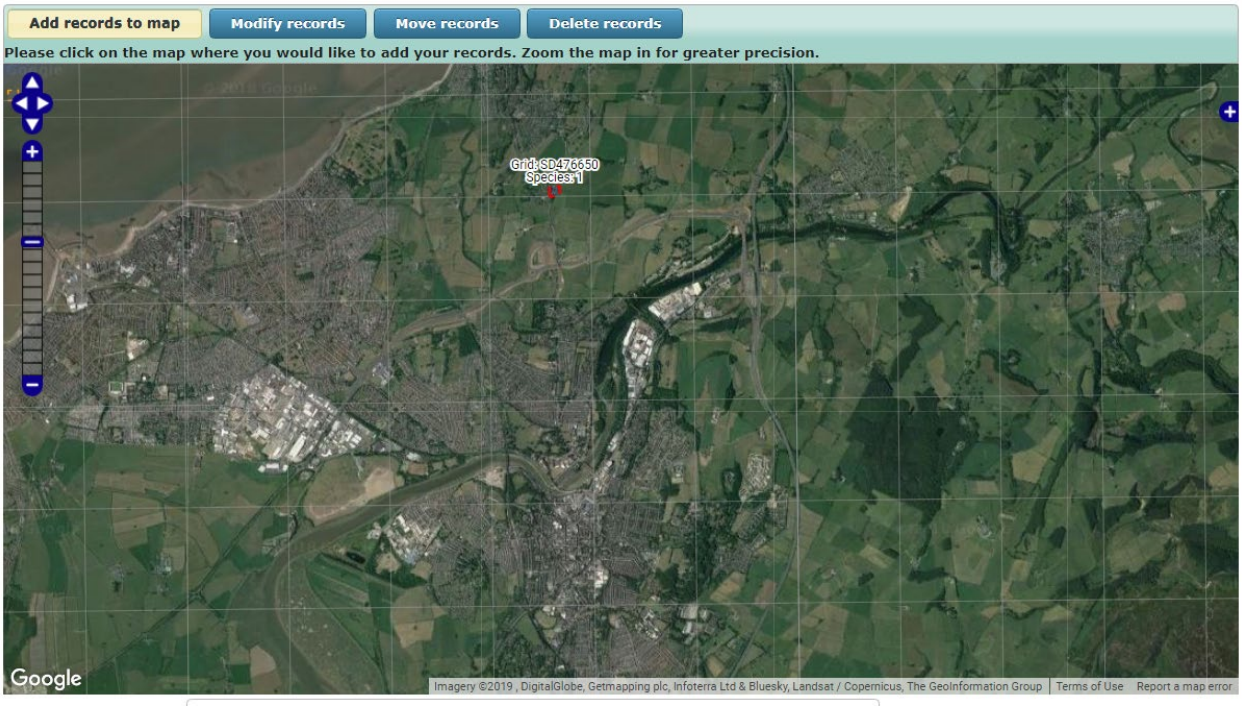
Tip: If you record regularly at a site, it really will be worth creating a site in the My Sites feature to make finding repeat sites very easy!

The entry grid looks as below…



We can of course specify additional details for any of these records if required. Click the Finish button to the top right of the grid when you are ready to continue to add the next grid square.

Click the **Finish** button when you are done. The map below shows an example at this stage.



You can continue to add more records at further grid squares and can add extra records to one of the existing grid squares. Click the Modify Records button above the map. Note how the instructions just beneath the buttons changes to tell you what to do:

Select the records on the map you wish to change.

Click on an existing grid square and you will return to the grid view of the records where you are free to add new records, details of records or to remove records you no longer want to add.

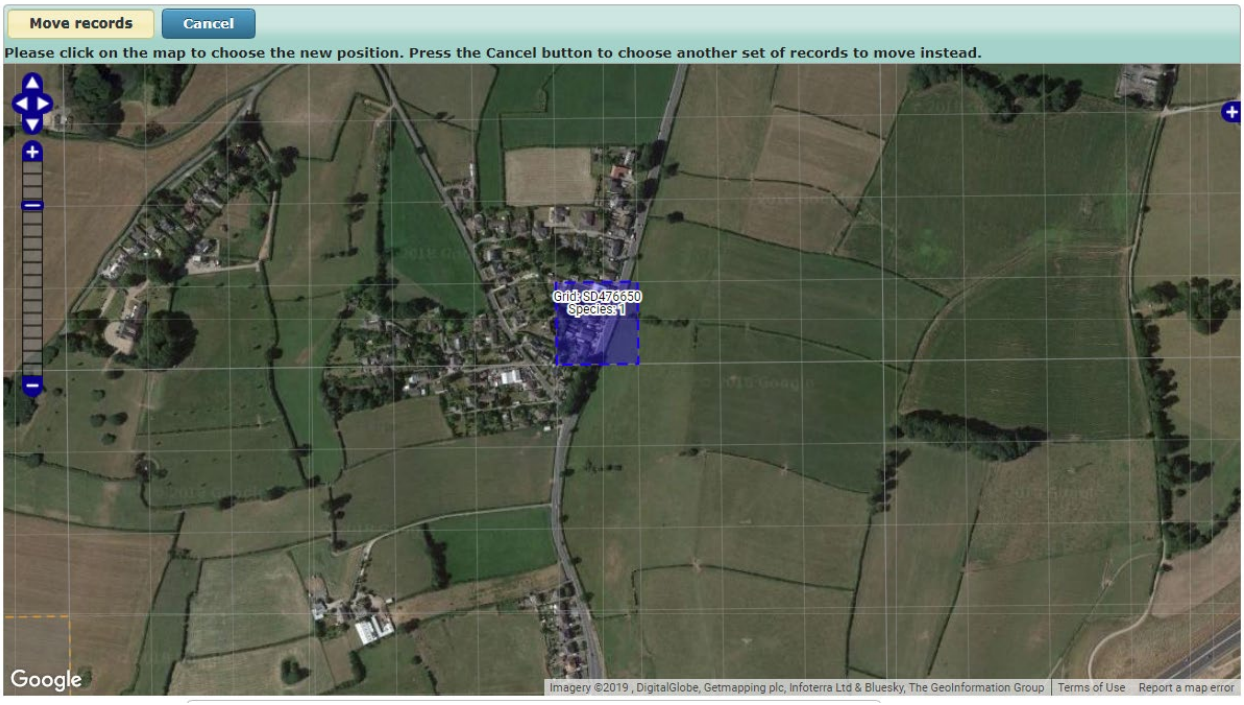
Move records - If you wish to move the location of records, click on the Move Records button and the instructions now say:

Please select the records on the map you wish to move.

Click on your chosen grid square and the instructions change to:

Please click on the map to choose the new position. Press the Cancel button to choose another set of records to move instead.

You can zoom the map in (the "ghost" image under the mouse cursor shows you how precise the grid square will be when you click). Click on the map just to relocate the square.



Modify records – If you have made a mistake, or wish to add something further, click Modify Records and the original record entry table will appear. You can then add more or edit existing records.

Delete records – clicking on this will let you select a square to delete. It will ask for confirmation before you take this drastic action!

CHAPTER EIGHT

DATA ENTRY TIPS

Data entry in iRecord is designed to be as quick and intuitive as possible, but there are a few tips and tricks which can make things even easier.

Control locking

There are little padlocks next to many boxes. If you click on one, they lock as below.

Try it with the lock by the Date, the date control is now greyed out and the padlock locked, indicating that the control value cannot be changed. Try clicking on the date control and you will see that it no longer accepts input. The real value of control locking is the control's value **will be remembered the next time you use this form.** So, we can use this facility when we need to input several batches of records which share some of the same attributes such as the date, place or recorder.

This works in the same way for all fields with padlocks.

Inputting lists of species

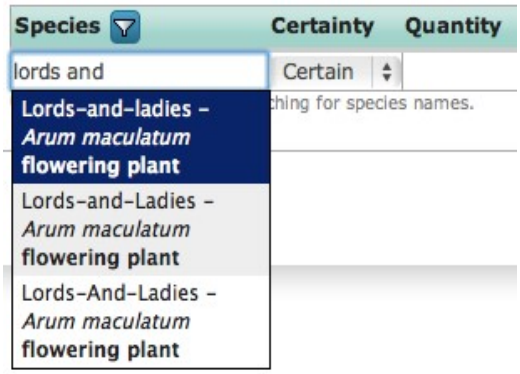
Choose **Record > Enter a list of records (for a site on a date**).

Tip: Don't forget that you can use the tab key to navigate forwards in the form - this is a standard feature of web browsers. Shift tab allows you to navigate backwards.

Here are a few names of species that can be entered:

- Lords and ladies
- Dog violet
- Greater-Spotted Woodpecker
- Parus caeruleus
- Magpie

It is worth exploring a few of the different issues relating to finding species names to get a clearer understanding of how it works so you'll be able to find names quickly and efficiently. Type "lords and" into the species name box. Your search is sent to the server and used to lookup possible species name matches as follows:



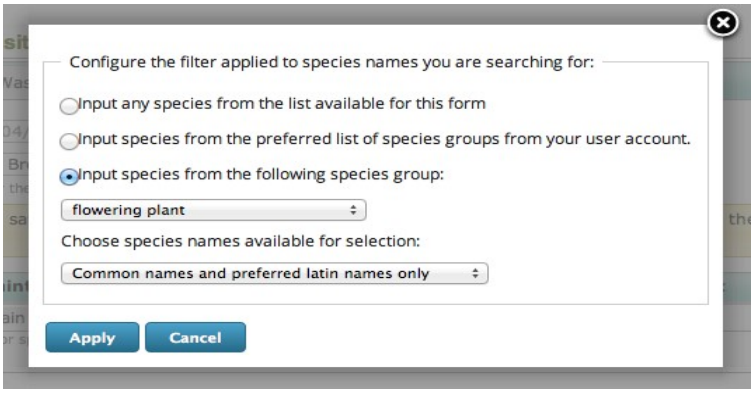
This is an interesting (i.e. deliberately chosen) example. 3 results are shown, but they are all for *Arum maculatum*, i.e. Lords-and-ladies or cuckoo pint. The reason is that iRecord uses the UK Species Index to provide species names and the UKSI lists 3 variants of the common name Lords-and-ladies with different capitalisation. Another interesting point here is that there are hyphens in the common names listed and the names are found even if you didn't include the hyphen in the characters we typed.

Tip: iRecord doesn't care about punctuation and other special characters when you search for a species name, so don't bother typing them. In fact, spaces are also ignored - typing "7sp" is enough to find "7-spot ladybird" and would also find 7 spot ladybird if it were listed without the hyphen.

Another way to select a species name uses an abbreviation of the scientific name - Type "armac" which is 2 letters from the genus name and 3 letters from the species name. This *should* find the species for us as iRecord supports 2+3 letter abbreviations as used in some other recording systems. However, as there are quite a few species with the same abbreviation, *Arum maculatum* does not make it to the top. One way around this is to limit the search to flowering plants, which is particularly useful if entering a list of many flowering plant records.

Tip: When using 2 + 3 letter species name abbreviations, utilise the filter button in the Species column header to limit your search to the appropriate species group(s). This works even more effectively when entering species from a not-so-extensive group as flowering plants.

To change the species names filter, click the filter button in the column header of the Species column. This pops up a dialog box allowing you to configure what names are available in the search filter. Select the option Input species from the following species group then in the associated drop-down box choose flowering plant.



Click Apply. Now, clear the species name input box and type “armac” again. This time you will find that Arum maculatum appears in the list a couple of places from the top. Use the down arrow key to move the highlighted name down, then hit the return key to select it.

The species name is selected and a new row is automatically added to the grid. Note that the input cursor is put straight into the new box in the Species column ready for you to continue typing species names. Let’s try the next name in the list, written as “Dog violet”. Type this name in. Nothing is found - you can tell this because the rotating “searching icon” appears briefly and then disappears, indicating nothing was found. One thing to bear in mind about using the UK Species Index to lookup species names is it does not understand the vagaries of the ways that we often share names. There are actually many dog violet species; we happen to know that Fred meant common dog violet, because we know Fred would have specified if it were something different. But iRecord can’t make these assumptions for you. If you can’t find a species name because you know that there is a part of the name missing, then insert a * character (asterisk character) as appropriate to act as a wildcard. Insert a * at the start of the species name input so you are searching for * dog violet and you will find that a number of dog violet species are returned with common a little way down the list. Select it and we’ll move on.

Now that you have input the plants from the list, click the filter button again and this time set the filter to “Birds” and click Apply.

iRecord does not care about capitalisation, spaces, or punctuation, type “greaterspottedwood” into the next Species search box. Again, the name is not found (this has been deliberately chosen to illustrate problems to learn how to handle them!). You might have noticed that we are searching for “Greater” instead of “Great”, but assuming that we hadn’t spotted this problem in the name we’ve input, a good way forward would be to search for something like “great*woodpecker”, since at least these parts of the name are unambiguous.

Tip: The * character is your friend when struggling to find a species name.

The next species for input has the latin name *Parus caeruleus*. Input this name and the name will not be found. This is because *P. caeruleus* is the name used for Blue Tit until a few years ago, when taxonomists realised it was not actually in the same genus as *Parus major*, the Great Tit. So, now it is known by the new name *Cyanistes caeruleus*, though the previously used synonym is sometimes still in use. We don’t want to look up the correct name to use every time this happens, so another option is to enable searching for synonyms. To do this, click the filter button in the Species column header again. This time, change the drop-down option for Choose species names available for selection to All names including common names and synonyms. In other words, all the names available in the UK Species Index become available for searching, whether they are current or not. Now retype “Parus caeruleus” and you should find that this time, the name is found.

As one more illustration of grid-based name input, try inputting a few dragonfly and damselfly names to examine the most efficient key strokes. The list we will input is:

- Beautiful agrion - *Calopteryx virgo*
- Common Darter - *Sympetrum striolatum*
- White-Legged Damselfly - *Platycnemis pennipes*

Clear the species names you have input so far, and try the following key strokes as quickly as you can:

cavir<return>systr<return>plpen<return>

Now, try the same experiment again, but type the following set of characters. Note the missing p in “plpen” which is our pretend typo.

cavir<return>systr<return>plen<return>

This time, if you managed to press return before the search completed for the misspelt “plen”, then you will notice the species name input box informs you that it failed to find any matches. Time to go back and correct it!

Tip: Practice using the keyboard only to input species and associated attributes into the input grid. In time it will become intuitive and is faster than using the mouse. Do this in Training Mode if you feel more comfortable.

One more thing, try typing “cavir” into the species search box then pressing <tab> instead of <return>. This time, the species name is picked but the input focus moves to the next control in the same row. You can then use the up or down arrow and return key to change the certainty of the record, or press tab again to change one of the other column values. Press tab a few times to move to the next row when ready to add a new species name, or shift tab to move backwards. When you are in a text input box (such as Quantity, Identified By or Comment you can use the up and down arrows to navigate between rows, though the web browser reserves these keystrokes for selecting items when the focused control is a drop down.

Tip: Don’t forget to use the record certainty attribute to mark-up records which you are not certain of the identification for. Also, note that if you are not certain of an identification to species level, but are certain of the genus you can always add a record at genus level.

CHAPTER NINE

UPLOADING PHOTOS

The ability to attach up to 4 photos to each record added via the grid is accessed via the add images link in the rightmost column of the grid. It's simply a matter of picking an image file from your disk to upload.

The file upload system used by iRecord examines the capabilities of your web browser to determine the best way to upload files. For example, if you are using a modern web browser with support for the latest standards, then it can resize the image so that the upload time is fast and show a progress bar for the upload. If you are running an old browser which does not support the latest web standards, then it will do a standard file upload which will be slow. If you are uploading multiple images for a batch of records, then a slow upload speed could become completely unworkable quite quickly. High speed broadband should provide quick uploads in most cases.

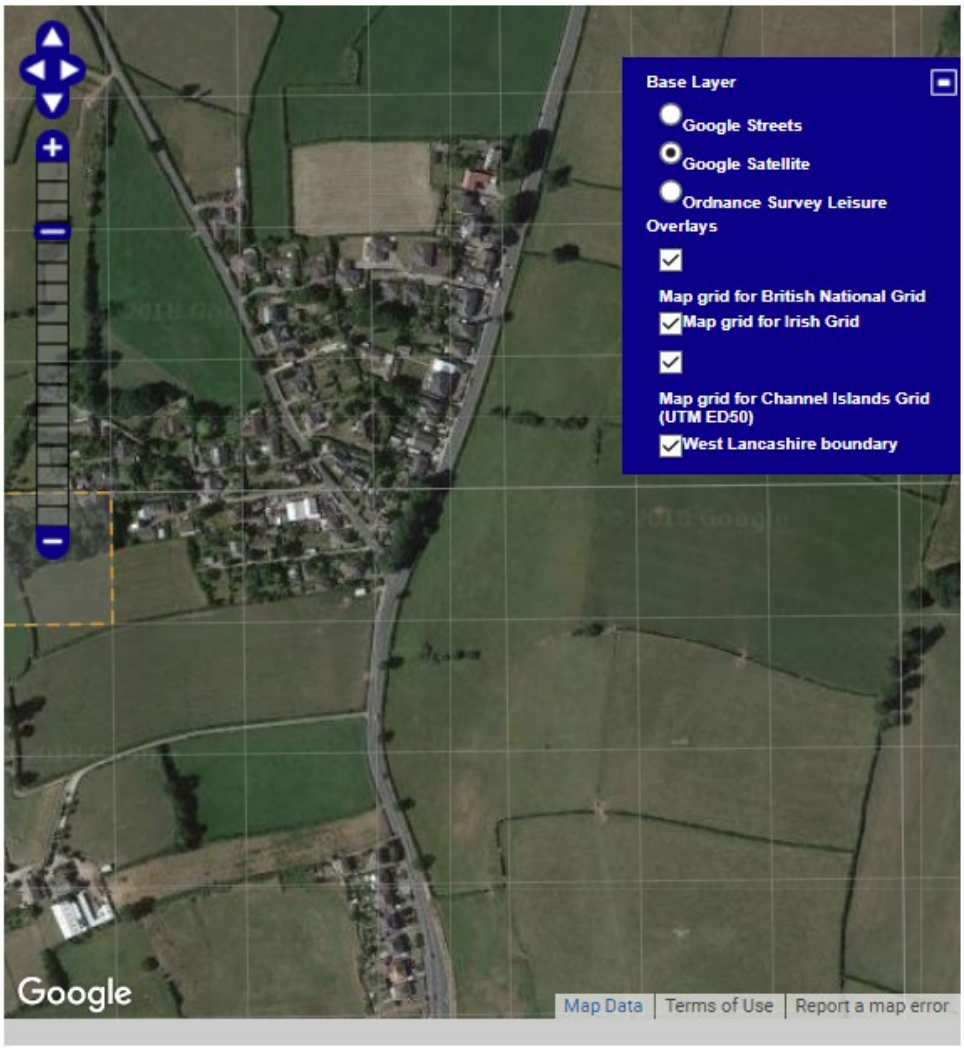
CHAPTER TEN

MAP TIPS

Here are a collection of tips and tricks for using iRecord's map during data input.

Map Layers

Click on the blue **+** button in the top right of the map. This expands a panel allowing you to choose from the various layers available. On the following screenshot, the first 2 are background layers provided by Google and the third is an Ordnance Survey map - you can show only one of these at a time. The second 2 are overlays which are drawn over the top of the base layer. You can show any combination of these you like. Because this user has identified themselves as working primarily in West Lancashire, the boundary of this Vice County has been added as default, but can be unticked if preferred.



Try changing the settings to see what they do. When you've finished, click the - button in the panel to close it.

Navigating around the map

Also overlaid onto iRecord maps you will find navigation and zoom buttons on the left hand side. Although sometimes a handy way is to use the mouse left button to drag the map around as required and to double click on the map to zoom in.

Another way to zoom into a precise region is to hold the shift key, then mouse-drag a rectangle on the map. The map will then zoom to show the rectangle. You can also zoom using Ctrl - mouse-wheel.

A third way to zoom the map into a place is to use the search for a place on the map input box on the left to find a town or village by name. Try typing "alfriston" into the box then click Search and the map will zoom into the village of Alfriston in Sussex, as it managed to find a unique place with that name. If you try searching for a more ambiguous name such as "arlington" you will see that you are given a list of possible matching places to pick from. However, it doesn't always find the place you want and you still have to click the map to select a grid reference for it.

7.4.3 Setting a grid reference for your record

The simplest way to set a grid reference for your record is to click once on the map where you would like the record to be. Most of the time this is all there is you need to know. The following points give you some extra details though:

1. As you hover over the map, a "ghost" image of the grid square you are about to pick is shown. This gives you a preview of the square size and position.
2. The more you zoom the map in, the more precise the grid reference will be. The map won't set a grid reference that is more accurate than could realistically be expected from the scale of the map.
3. When you click to set a grid reference, the map will zoom into the grid reference square giving you a chance to click again to set an even more precise grid reference.
4. If the map is showing the street map base layer, then when you click on the map to set a grid reference and it automatically zooms in, if the zoom scale is high enough the map will automatically switch to satellite view so you can set a precise grid reference more easily.
5. If you hold down the + key whilst over the map, the precision of the grid reference is increased. Using the minus key will return you to six-figure precision.

CHAPTER ELEVEN

EXPLORING RECORDS

One of the key features of iRecord is that non-sensitive records are immediately visible to other users. This allows you to see what is being recorded near your patch or by your friends and colleagues. In this section we will take a look at the Explore options available in iRecord for browsing existing records.

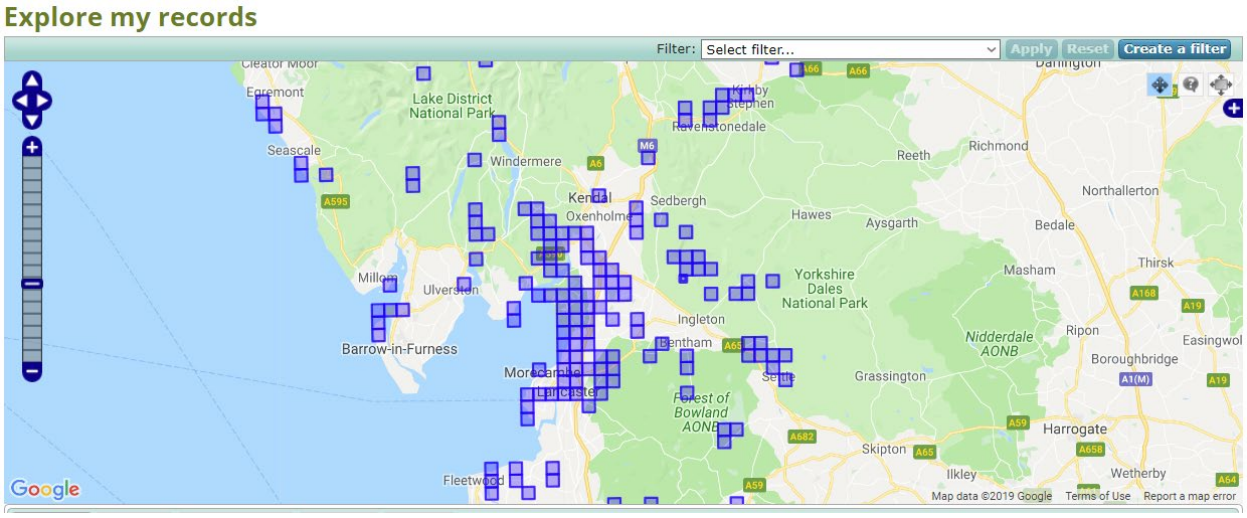
Exploring my Records

There are 2 Explore pages accessible from the menus in iRecord - Explore all records and Explore my records. Both are the same except that the **My records** version is filtered to only your own records.

The Explore pages are divided into 2 parts, a map panel and a data panel as described below. If you have added a recording area to your profile, it will appear and your map will be centred on it.

Map Panel

The map shows records that match the current filter; in this case the filter is all records input by me. When you are zoomed to show a distant view of the map, a small grid square would simply not be visible so iRecord automatically draws a larger circle over the record until you are zoomed in far enough to show the record as a proper square. This map image shows the appearance of records when you are zoomed out:

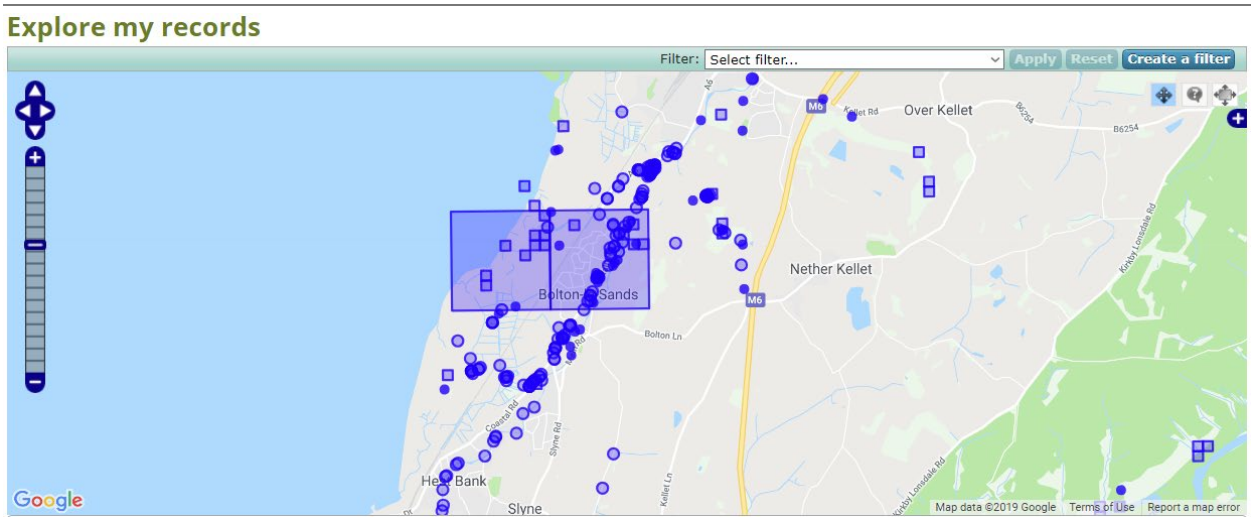


NOTE - Selecting specific records - You can click on the question-mark icon (map, top left corner) then click on a square and the list of records will be filtered to include only those from that square.

If you hold the left mouse button down and drag the mouse you can draw a rectangle and then see all records falling within that area.

The third symbol in the top right will make your map full-screen, which can help by giving you a larger working area.

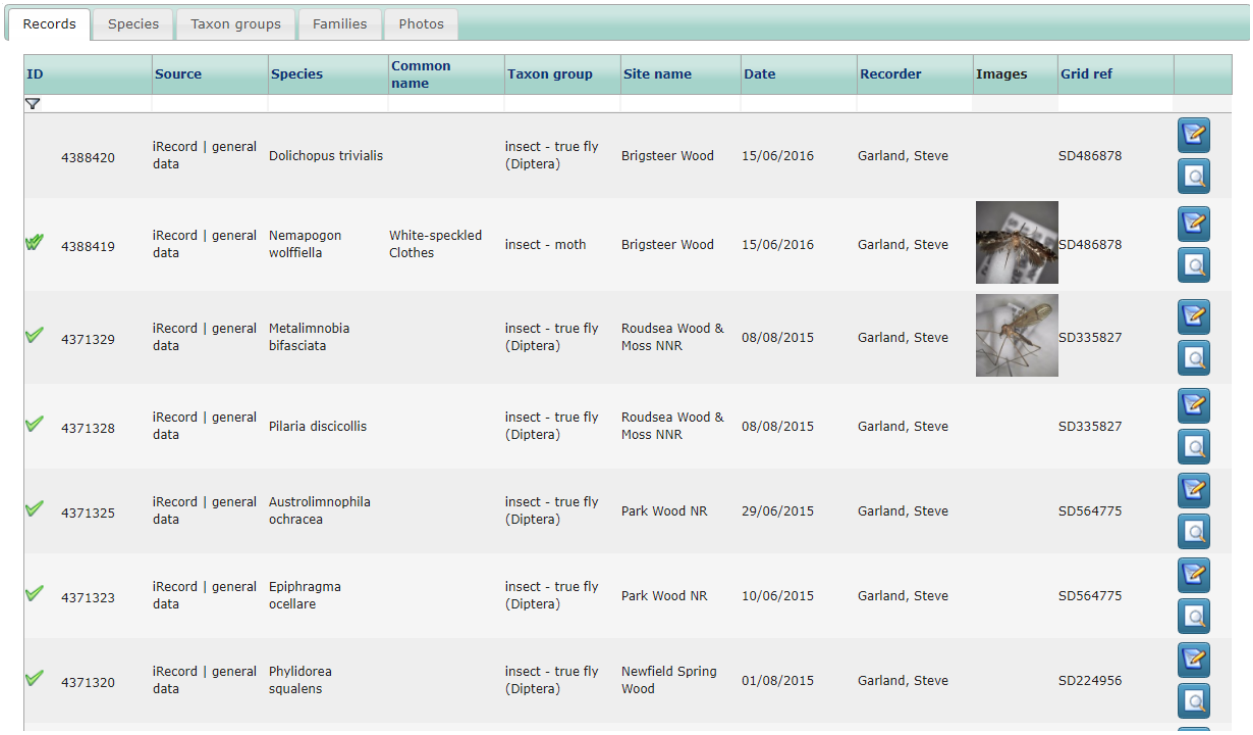
And on the next page are the same records, shown when zoomed in:



The larger squares are records with 1km data, the smaller squares are 100m squares, circles are records from the iRecord App that were originally input as Lat/Long. If you zoom in further you would see tiny 10m squares too where data had that level of accuracy.

Data Panel

Underneath the map there is a data panel which shows a list of records currently loaded on the map:



ID	Source	Species	Common name	Taxon group	Site name	Date	Recorder	Images	Grid ref
4388420	iRecord | general data	Dolichopus trivialis		insect - true fly (Diptera)	Brigsteer Wood	15/06/2016	Garland, Steve		SD486878
4388419	iRecord | general data	Nemapogon wolffiella	White-speckled Clothes	insect - moth	Brigsteer Wood	15/06/2016	Garland, Steve		SD486878
4371329	iRecord | general data	Metalimnobia bifasciata		insect - true fly (Diptera)	Roudsea Wood & Moss NNR	08/08/2015	Garland, Steve		SD335827
4371328	iRecord | general data	Pilaria discicollis		insect - true fly (Diptera)	Roudsea Wood & Moss NNR	08/08/2015	Garland, Steve		SD335827
4371325	iRecord | general data	Austrolimnophila ochracea		insect - true fly (Diptera)	Park Wood NR	29/06/2015	Garland, Steve		SD564775
4371323	iRecord | general data	Epiphragma ocellare		insect - true fly (Diptera)	Park Wood NR	10/06/2015	Garland, Steve		SD564775
4371320	iRecord | general data	Phylidorea squalens		insect - true fly (Diptera)	Newfield Spring Wood	01/08/2015	Garland, Steve		SD224956

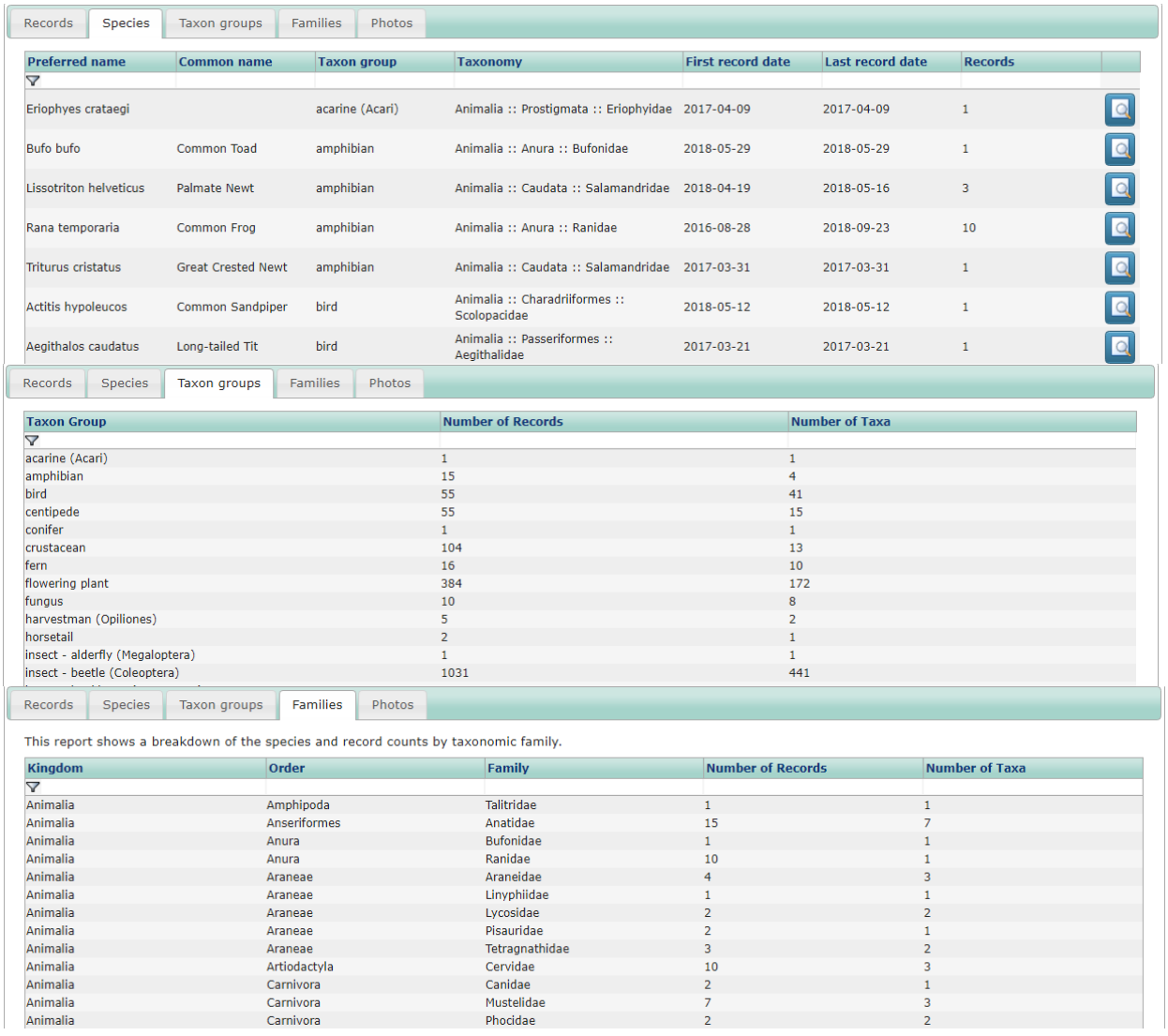
In this grid, details of the record including any photos are shown. The icon in the ID column gives an indication of the record's quality:

- No symbol – not yet checked by an expert
- Red cross - record checked by an expert and **not accepted as was unable to verify**
- Two red crosses – **not accepted as is incorrect**
- Question mark - record checked by an expert and marked as **plausible**
- Green tick - record checked by an expert and **considered correct**
- Double green tick – record checked by an expert as **correct**

Verifiers use these statuses in slightly different ways, but generally:

- Correct – often a picture was attached that allowed the verifier to confirm an accurate ID, or it may be that the ID is straightforward and the Verifier knows the recorder is competent. However, some Verifiers use this only for records with proof attached. This record will go into the NBN database.
- Considered correct – This may include critical species where the recorder is known to be competent with the species, but actual proof wasn't attached (I don't post a picture of the genitalia of every critical moth species I dissect. If they are common and easy to ID on genitalia I will have posted at least one picture to show my ID, but the Verifier may trust me after that). Recording schemes often have critical species, where they will only accept records with proof. This record will go into the NBN database.
- Plausible – Verifiers may use this for common species that are known in the area, but the level of skill of the recorder, or the amount of information provided doesn't provide adequate proof for confirmation.
- One cross would include photographs where not enough detail is visible for a positive ID, but it could be that species.
- Two crosses mean that the Verifier considers the record to be DEFINITELY incorrect.

The data panel has four other tabs, showing a list of the species currently loaded; a list of Taxon Groups; a list of Families and all associated photos. All of these lists can be filtered to find the information that you need (see Chapters 15 and 16 for more information on filtering):



Records | Species | Taxon groups | Families | Photos

Preferred name	Common name	Taxon group	Taxonomy	First record date	Last record date	Records
Eriophyes crataegi		acarine (Acari)	Animalia :: Prostigmata :: Eriophyidae	2017-04-09	2017-04-09	1
Bufo bufo	Common Toad	amphibian	Animalia :: Anura :: Bufonidae	2018-05-29	2018-05-29	1
Lissotriton helveticus	Palmate Newt	amphibian	Animalia :: Caudata :: Salamandridae	2018-04-19	2018-05-16	3
Rana temporaria	Common Frog	amphibian	Animalia :: Anura :: Ranidae	2016-08-28	2018-09-23	10
Triturus cristatus	Great Crested Newt	amphibian	Animalia :: Caudata :: Salamandridae	2017-03-31	2017-03-31	1
Actitis hypoleucos	Common Sandpiper	bird	Animalia :: Charadriiformes :: Scolopacidae	2018-05-12	2018-05-12	1
Aegithalos caudatus	Long-tailed Tit	bird	Animalia :: Passeriformes :: Aegithalidae	2017-03-21	2017-03-21	1

Records | Species | Taxon groups | Families | Photos

Taxon Group	Number of Records	Number of Taxa
acarine (Acari)	1	1
amphibian	15	4
bird	55	41
centipede	55	15
conifer	1	1
crustacean	104	13
fern	16	10
flowering plant	384	172
fungus	10	8
harvestman (Opiliones)	5	2
horsetail	2	1
insect - alderfly (Megaloptera)	1	1
insect - beetle (Coleoptera)	1031	441

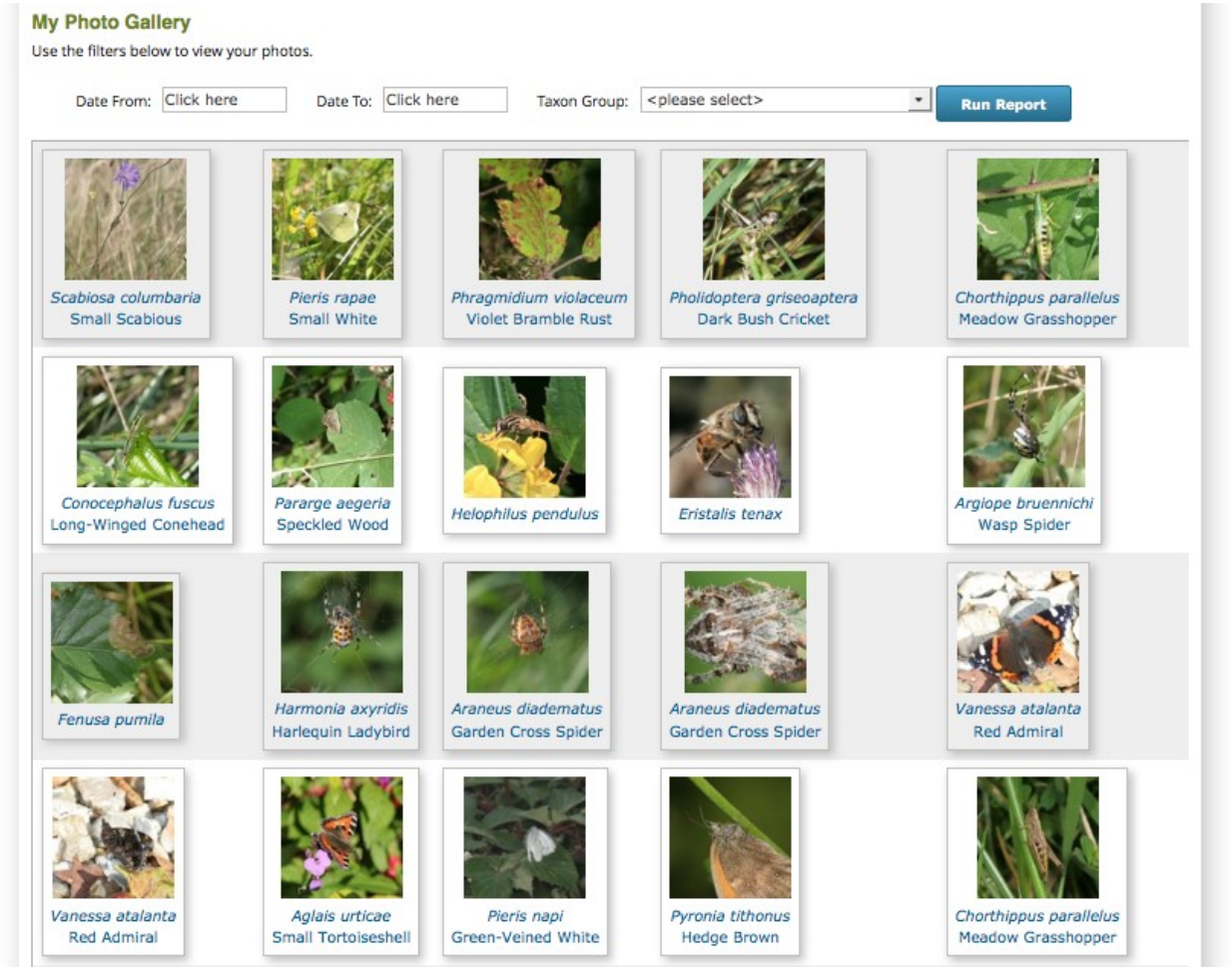
Records | Species | Taxon groups | Families | Photos

This report shows a breakdown of the species and record counts by taxonomic family.

Kingdom	Order	Family	Number of Records	Number of Taxa
Animalia	Amphipoda	Talitridae	1	1
Animalia	Anseriformes	Anatidae	15	7
Animalia	Anura	Bufonidae	1	1
Animalia	Anura	Ranidae	10	1
Animalia	Araneae	Araneidae	4	3
Animalia	Araneae	Linyphiidae	1	1
Animalia	Araneae	Lycosidae	2	2
Animalia	Araneae	Pisauridae	2	1
Animalia	Araneae	Tetragnathidae	3	2
Animalia	Artiodactyla	Cervidae	10	3
Animalia	Carnivora	Canidae	2	1
Animalia	Carnivora	Mustelidae	7	3
Animalia	Carnivora	Phocidae	2	2

Explore > My photo gallery

Your photos can also be viewed from the **Explore** > **My photo gallery** menu item provides exactly that:

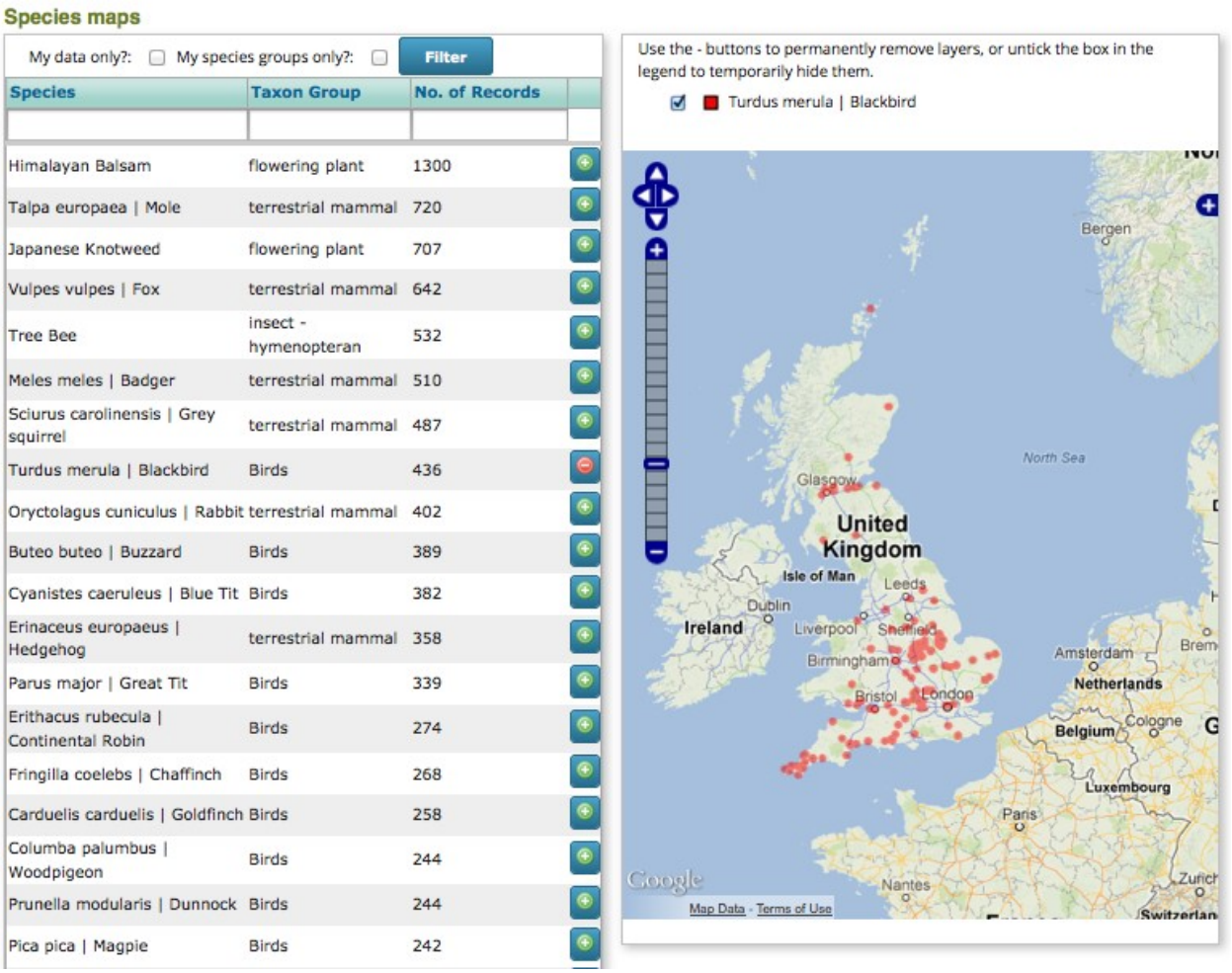


There are simple filters based on date range and species group to help you look up photos. For more advanced filtering options, your photos are presented in tabular form on the other explore pages.

Explore > Species Maps

The **Explore** > **Species Maps** page provides a really quick and easy way to draw maps of the various species data held in iRecord.

REMEMBER – this isn't a full national distribution map, just those on iRecord, minus any filtered out by you.



Simply search for the species you want to map in the table on the left and use the + button to add a map layer for that species. You can:

- Add up to 4 species layers to the map at once
- Filter to show only your own records
- Use the filter row in the top of the species table to search for a species by name.

CHAPTER TWELVE

MY SITES

The My Sites facility in iRecord is a great way to keep a personal list of sites you regularly record at. You can also add sites selected from a standard list of sites to your own personal list, currently the only sites available are the National Nature Reserves but other site types may be added in future.

Follow through the steps below to add one of your local recording patches to your account.

1. Select Explore > My Sites from the menu. Click the Create Site button near the bottom of the page to start adding a new site on the Site Details page.
2. Enter a name for your site into the Site Name box.
3. Use the Search for Place on Map box to search for a nearby town or village. Once you have zoomed the map to the vicinity of your site, use the methods of panning and zooming your map until the map includes all of your site boundary.
4. Select the leftmost tool in the row of toolbuttons at the top of the map. This tool lets you specify the centre grid reference of your site. Click once on your site's approximate centre to set this.

Symbol 1 - click on the map to set a location which is then used as the default grid reference for the site.

Symbol 2 – Make the map full screen

Symbol 3 – Draw a polygon to create a site.

Symbol 4 – Draw a line to create a linear site

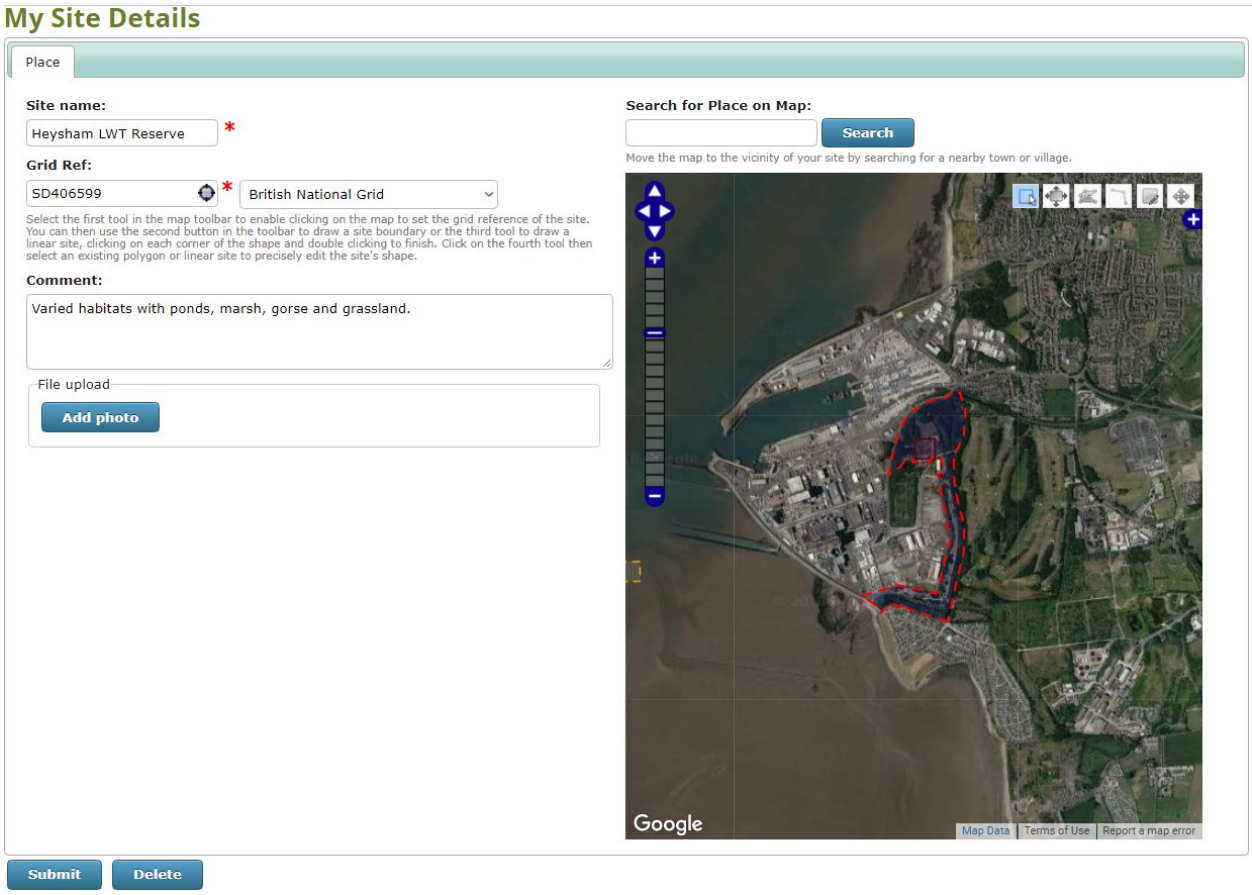
Symbol 5 – Modify an existing outline. You need to play with this one as it can do lots of different things

Symbol 6 – Use this to drag the map around

NOTE – If you are in the middle of drawing a map and you are running off the edge, you can click, hold down the button and drag the map. When you release the button, you will not have added to your boundary and can then continue. (Sometimes you may find that a new point hasn't been added to your boundary when you expect it – this is caused by you slightly moving the mouse by accident. Don't worry, click again).

5. Specify a comment for your site to describe it (Optional).
6. Using the map layer panel, switch to Google Satellite as your base layer.
7. Since our site is a polygon (it could be a linear site), choose the next tool to the right which is the draw polygon tool.
8. Now, click once on the map on a corner of your site. Work your way around the site boundary, clicking once for each change in direction of the site boundary to gradually build up the shape of your site. Double click to finish once you have completed the boundary.

My site details form now looks like the following:



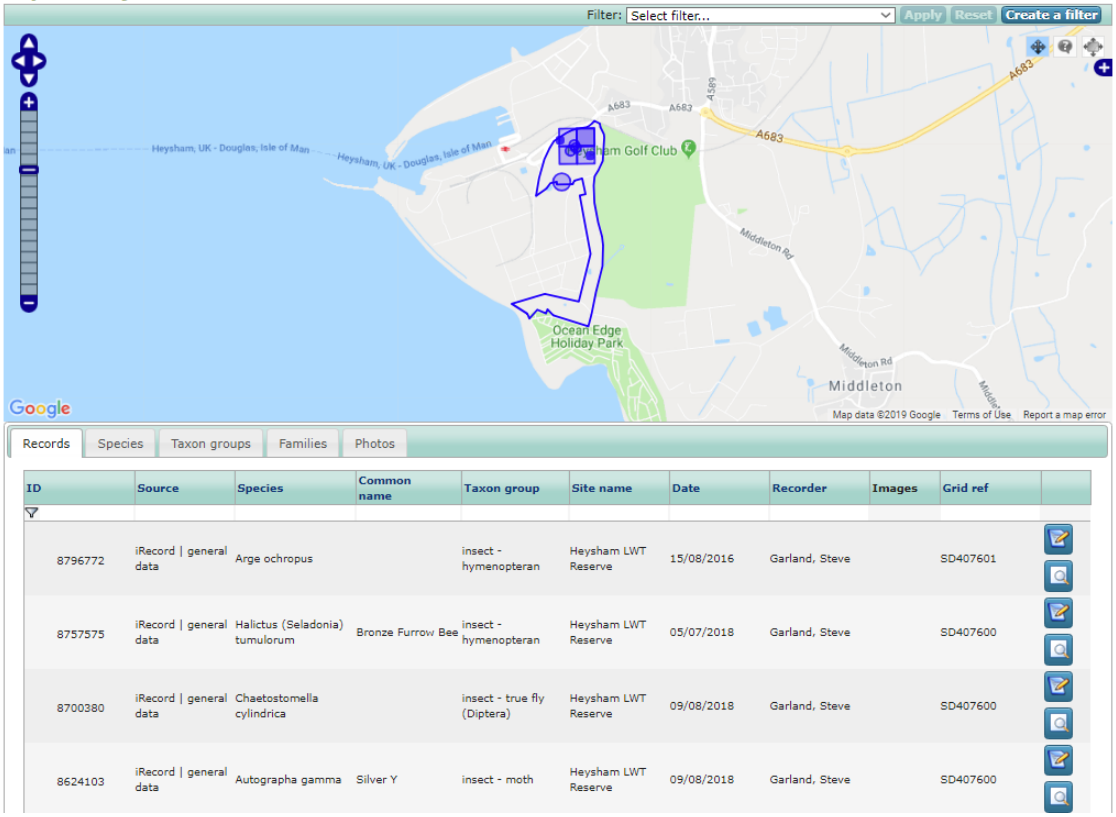
Press the Submit button to complete the site creation process. You can now enter records for the site.

1. Select Record > Enter a casual record on the menu.
2. Set a record for today's date and choose any species you would like to record.
3. In the Location box, type the first few characters of the name of the site you just created. iRecord will search against your list of sites and find the matches. When the site name appears, select it. iRecord will zoom the map straight in to show the site boundary for you.
4. Click once on the map to set the grid reference, zooming in further first if necessary.
5. Set the Habitat as appropriate for your record. **Note that this value will be remembered for you the next time you record at this site.**
6. Save the record.
7. Go back to the Explore > My Sites page. This time, click the Explore button beside your site. This takes you to the Explore my records page, filtered to show your records from that site. Below is an example using Heysham LWT Nature Reserve

USEFUL NOTE – If you make errors in your boundary you can either:

- Use the Modify button to modify it **OR**
- Just repeat the drawing process again. At the finish it will ask you whether or not you want to replace the previous boundary – click yes and the old one will disappear – the new one will replace it.

Explore my records



ID	Source	Species	Common name	Taxon group	Site name	Date	Recorder	Images	Grid ref
8796772	iRecord | general data	Arge ochropus		insect - hymenopteran	Heysham LWT Reserve	15/08/2016	Garland, Steve		SD407601
8757575	iRecord | general data	Halictus (Seladonia) tumulorum	Bronze Furrow Bee	insect - hymenopteran	Heysham LWT Reserve	05/07/2018	Garland, Steve		SD407600
8700380	iRecord | general data	Chaetostomella cylindrica		insect - true fly (Diptera)	Heysham LWT Reserve	09/08/2018	Garland, Steve		SD407600
8624103	iRecord | general data	Autographa gamma	Silver Y	insect - moth	Heysham LWT Reserve	09/08/2018	Garland, Steve		SD407600

The next page shows what the **My sites** page looks like once you have created a number of sites. Each site shows the number of your records, number of species (taxa) and number of taxon groups from that site. By clicking on the column headers, you can sort them in ascending or descending order either numerically or alphabetically. This screen-shot has been sorted to show the sites with the most records first.

Note also that you can have overlapping sites.

If you wish to find a site by its name you can sort the columns and use searches including wildcard searches as described in Chapter 15 and 16.

My sites

This page allows you to manage your list of recording sites. You can search for public site boundaries to add to your list or add your own personal sites. Click edit to change the site boundary of a site you have created, remove to drop a public site boudary from your personal list, or explore to view the records and species at a site.

Note that the count of records and taxa given in the table of sites below will only include records which physically lie within or overlap the site boundary. Yo may need to edit the site to update the site boundary to get the correct counts.

Find additional sites to store in your sites list

Select site by locality

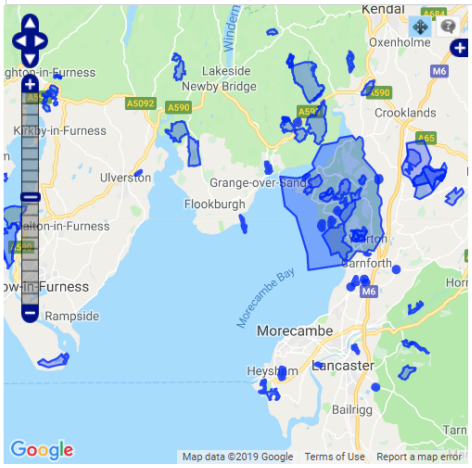
<all>

<Please select>

Add to My Sites

Or search for a site:

Add to My Sites



Site Name	No. of Records	Actions
Arnside & Silverdale AONB	660	edit explore
Hutton Roof study area	304	edit explore
Hutton Roof Crags CWT Reserve	222	edit explore
Leighton Moss RSPB - main site	196	edit explore
Hutton Roof NNR	189	Remove explore
Warton Crag (whole site)	164	edit explore
Whitbarrow NNR	149	Remove explore
Park Wood CWT reserve	129	edit explore
6 Main Road, Bolton le Sands	128	edit explore
Hay Bridge Nature Reserve	126	edit explore
Winmarleigh and Cockerham Moss LWT Reserve	123	edit explore
Heysham LWT Reserve	118	edit explore
157 Tudor Avenue, Bolton	117	edit explore
Burns Beck Moss CWT Reserve	110	edit explore
Little Budworth Common	105	edit explore
Gresgarth Hall	101	edit explore
Ingleborough NNR	100	Remove explore
Mere Sands Wood LWT Reserve	99	edit explore
Hale Moss CWT Reserve	94	edit explore
Brock Bottoms	90	edit explore

first prev 1 2 3 4 5 6 next last

Showing records 1 to 20 of 129

Create site

Download this report

CHAPTER THIRTEEN

TAXON-SPECIFIC FORMS LIBRARY

Previous chapters have shown the general-purpose recording forms. These are quite basic in terms of the attributes that you can record with each record, for example you can't provide detailed life stage information in the Stage field since the field's values are general purpose. As well as more specialist recording forms, iRecord also allows groups, schemes and societies to add forms for their own purposes, with attributes and options appropriate to them. These are available on the Record > Taxon-specific Forms menu item. As of January 2019, they include: Vascular plants (grid recording); Bryophytes; Dragonflies – multiple species; Dragonflies – single species; Ladybirds; Moths and Glow-worms. More may be added as new groups create special forms.

Because of the way that iRecord was developed, adding new custom forms such as these is a fairly simple process, so the library of available forms is likely to continue growing.

CHAPTER FOURTEEN

SUMMARY REPORTS

The Summarise Menu option provides access to some quick and simple ways to view data summaries from iRecord.

My data summary

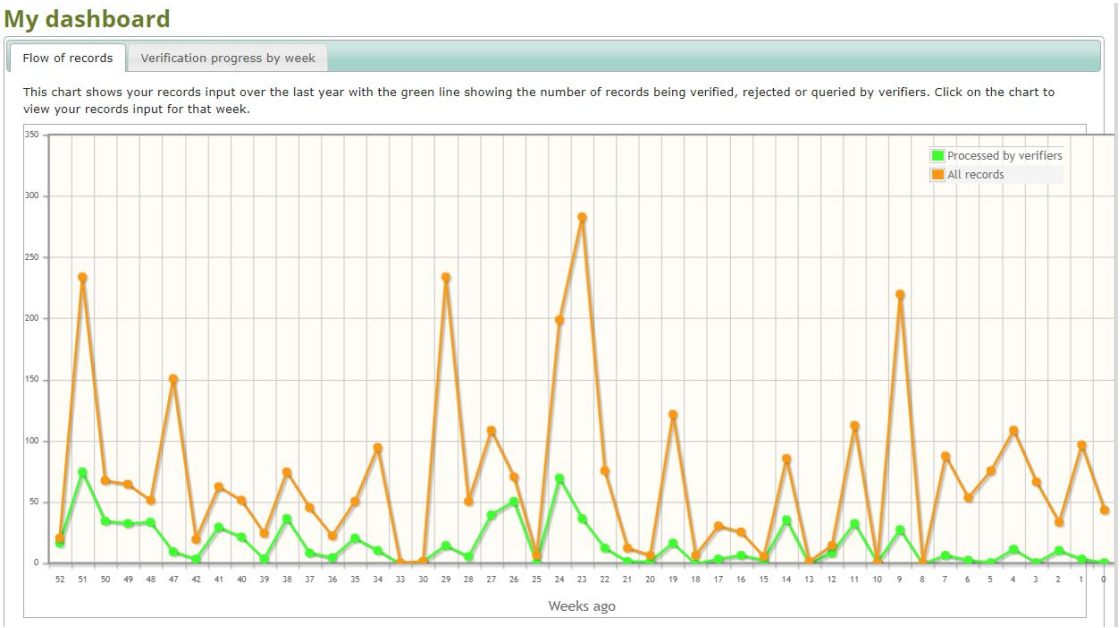
Click on the Summarise > General Summaries menu item to access a collection of reports summarising the records you have entered as well as the records entered into iRecord as a whole.

My data summary

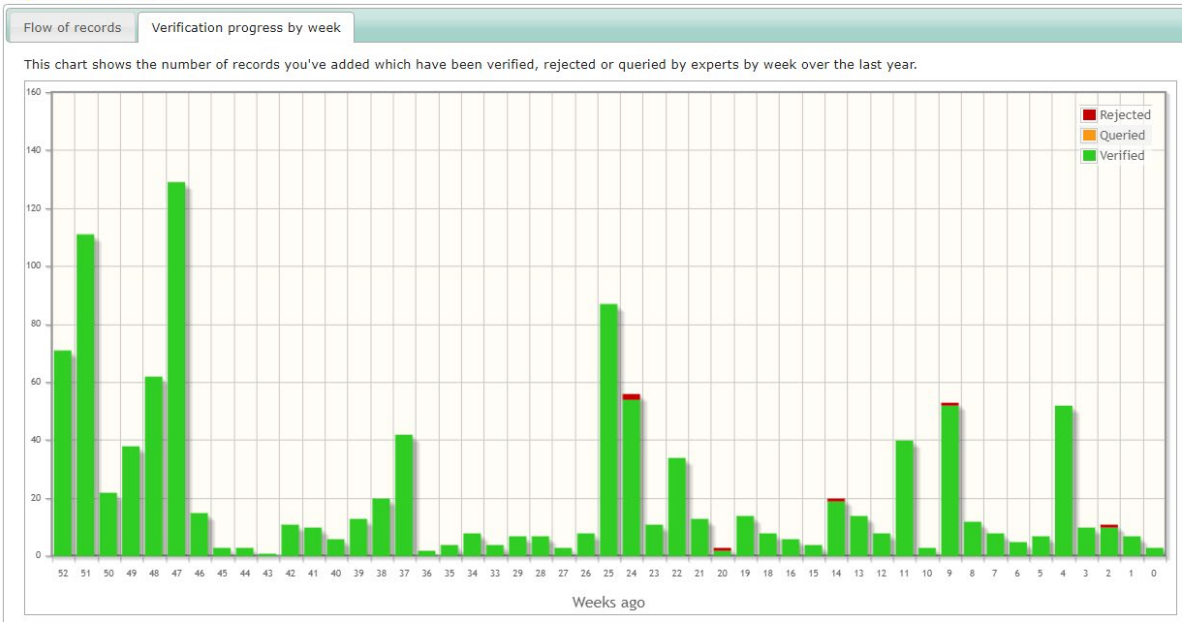
Count of	Total	Verified as correct	Added in last month	Added in last year
Records	6101	2387	286	3273
Species	1984	978	214	1326
Records I've verified	139	134	0	77
Species I've verified	34	32	0	27

My dashboard

Summarise > My dashboard shows a graphical summary of your data input over the last year and progress on verifying your records. The Verification progress by week shows exactly that.

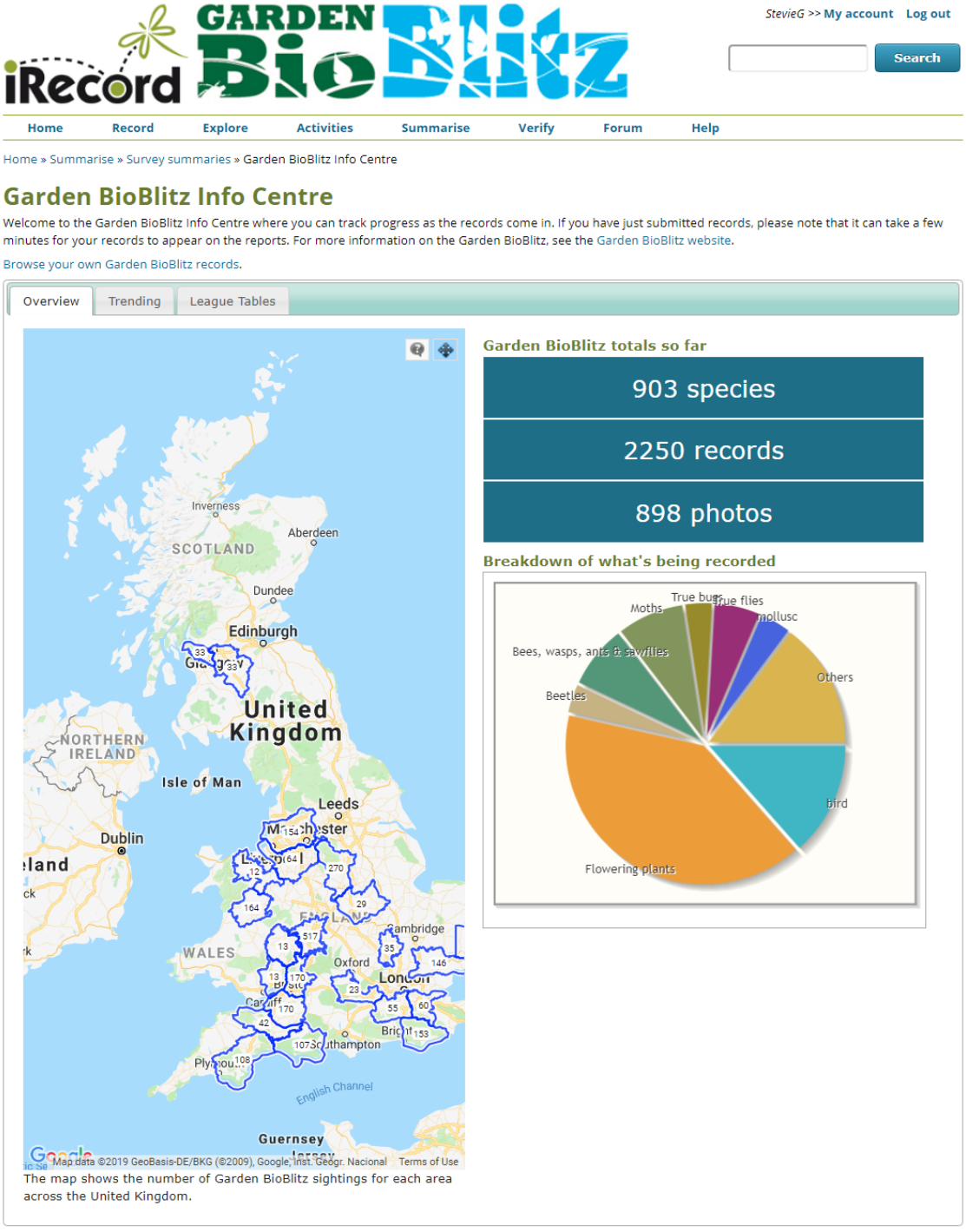


My dashboard



Survey Summaries (Activities – *see chapter 19, p49 for more Activity info)*

Specific surveys which host their records on iRecord sometimes opt to provide a summary page to show progress. This might apply to a bioblitz or a survey of a specific site, for example. These summary pages are listed under the **Summarise > Survey summaries** menu item. Here's the summary page available for Garden Bioblitz to 2018



CHAPTER FIFTEEN

SEARCHING RECORDS USING FILTERS

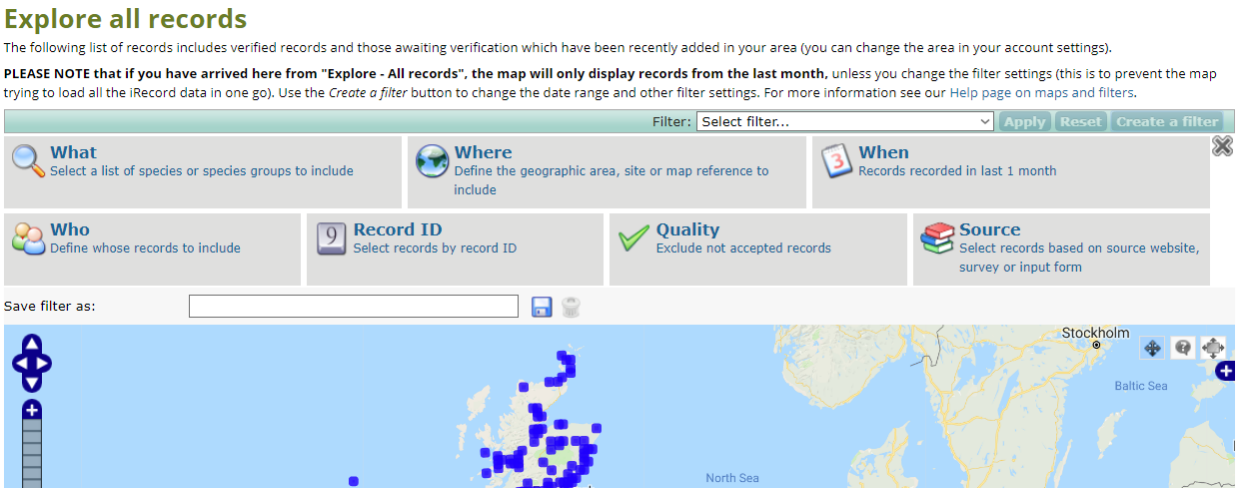
There are two levels for doing this – either 'Explore my records' OR 'Explore all records'. The main difference between the two is that the default start screen for 'my records' will include **all** of **your** records, whereas the default start screen for 'all records' will include just the **latest month** of **everyone's** records. This is because starting the screen with absolutely all records on the database would be extremely slow, due to the numbers. If you are searching 'all records' you will almost always want to select a filter to run or create a filter, which will include the date period you are interested in – unless you really are only interested in the last month!

If you are searching 'my records' you may also use these filters as well as using 'Table Column filters' – see the next Chapter.

Go to the Explore > Explore all records screen. The map shows dots for all records received in the last month only. They are also listed in a table underneath. In one month, this can still be 20,000 or more records. This is because the system would run too slowly if it tried to load all the records - at the foot of the Home page there is the latest total of records in the iRecord system – 6.6 million on 28 January 2019.

If you want to extract records for (say) a particular Vice County, site, or for a particular taxa or map reference you will need to use a filter. You can create one to suit your needs and then save it for future use.

Click on Create a filter on the top right of the bar above the map and the following choices will appear.

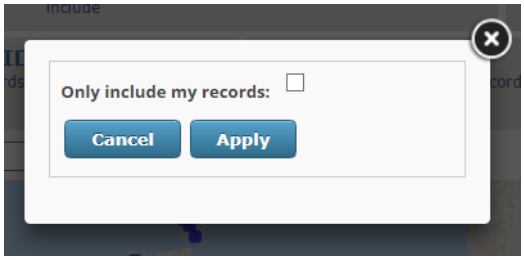


What lets you choose taxa to include. This can be done at species, Family or Order levels or using conservation statuses, marine or non-marine statuses (useful for Isopods if you only want woodlice or for freshwater fish for example) and for Levels (though I've never found a need for this yet!).

Where lets you define a geographic area. This can be one of your 'My sites' or Vice Counties, LRC areas etc. Whatever you select – remember to click the ADD button and your selection will appear beside a red X. Clicking this X will remove it again. **If it isn't there with a red X, you haven't selected it.** You can also use grid references and even draw a shape on the map to filter records. These are things you need to play with to see which are best for your needs.

When is set as default at one month. You can filter by the field record date, input date, last changed date or verification status change date. Think about these to decide which one will give you the records you need. You can set dates FROM and TO, or a maximum record age such as 7 days, 1 year, 5 years, 8 months etc. **Click APPLY when you've finished.**

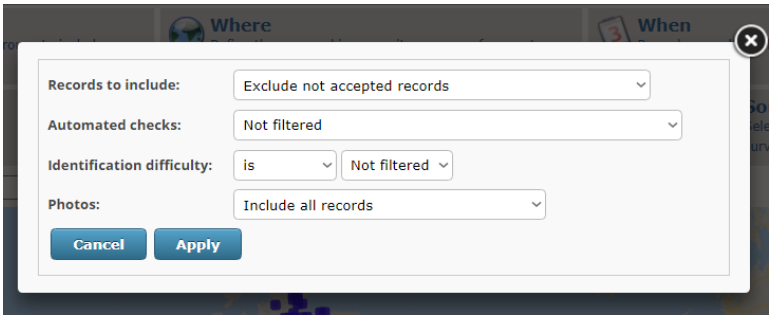
Who only lets you choose to tick 'Only include my records'



There is no way to filter out the records of any one recorder or group of recorders from the Filter menu.

Record ID lets you select records by their unique number – this isn't a feature I use much, but it's there if you need it.

Quality lets you included or exclude records based on whether or not they have been verified, whether they have been accepted, rejected, not yet reviewed and all other statuses and combinations.



Source lets you filter records by their origins, with lists of possible sources under Websites, Survey datasets or Input forms.

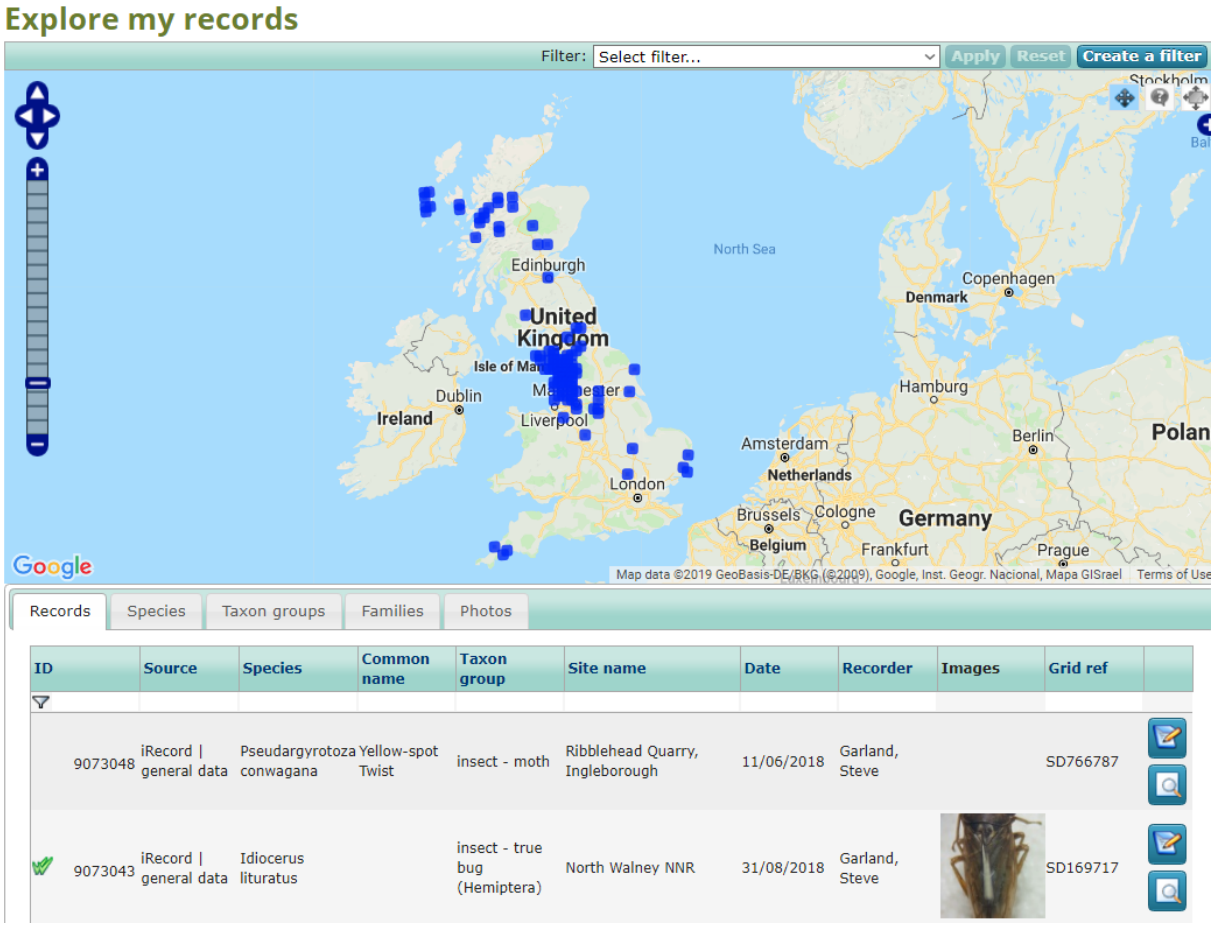
If you create Filters from the 'my records' screen you get all the above choices, except the **Who** category.

CHAPTER SIXTEEN

SEARCHING RECORDS USING COLUMNS

In both the 'all records' and 'my records' screens the table of records has headers – these being:

- ID – the unique record ID code (a long number)
- Source – how the data was input (includes 'iRecord | App'; 'iRecord | Orthoptera Recording'; iRecord | general data and many others
- Species – the scientific (latin) name of the species recorded
- Common name – the English name for the species
- Taxon group – group names, such as insect – true fly (Diptera); centipede; terrestrial mammal; bird
- Site name – the name entered under 'Location' either a formal site name or the free text description entered
- Date – the date of the recording
- Recorder – the entered name of the recorder of the record
- Images – a thumbnail of any attached photos
- Grid ref – the map reference or lat/long of the record



Sorting on a column

Click on the title of the column (Species, Site name, Date etc). The column will be sorted into ascending order of that column, either alphabetically, alphanumerically or numerically, depending on the content/format of the data.

An upward-pointing arrow appears by the column label to identify the sorted column and an ascending sort. A second click reverses the sort-order to descending. Only one column can be sorted at a time.

Temporary Filters

Just below the ID column label is a tiny filter-funnel icon. This labels a blank row, into which you can type search terms. You can type in a word or part of a word. If you type 'formica' it will bring up only Formica ants. However, if you type 'for' it will bring up Formica, Forficula and any other species records beginning 'for'.

Once you have typed in your search word, use the Tab key to move out of the box, or use the Enter key or use the mouse to click outside the box for the filter to take effect.

If you wish to search for a word that may not be at the start of the name you can use a wildcard '*' symbol. If you now type '*for' you will still get **For**mica and **For**ficula, but also Chloromyia **for**mosa, Chrysopilus asili**for**mis and many others.

These filters can be combined across a number of columns. For example you may search 'formica', but then put Brockholes in the Site name filter. The list of ant records will now only show those from the Brockholes site.

The wildcard filters work on all columns (including Grid ref) **except** the Site name and Date columns. The site names can only be filtered by the start of the name (no wildcards) and the Date can be filtered by year by typing either 2018 or 18 or by a single day, using the dd/mm/yyyy format.

Sorting from the map

If you look at the top right-hand corner of the map and click the (?) icon, you can then click on individual squares on the map. The records grid will then show only those records from that square. You may sometimes get a warning box saying that there are too many records to show in the grid. This is no problem as they display over several pages. You can reduce the number of records by zooming in further and selecting a smaller square.

Sorting and filtering on other Records tabs.

Similar sorts and filters can be used on columns in the **Species**, **Taxon groups** and **Families** tabs of 'exploring … records' – to be found just below the map.

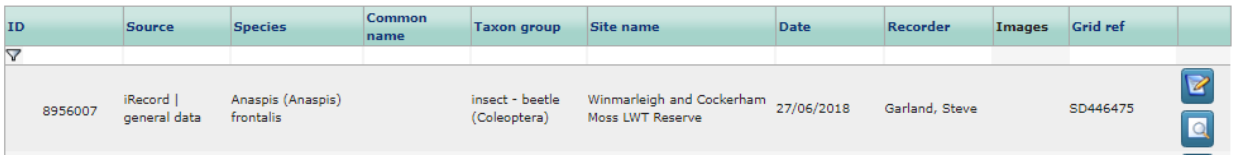
CHAPTER SEVENTEEN

WHAT CAN GO WRONG? FAQs

I made a mistake and now my submitted record is wrong.

It may be that you clicked the wrong date, the wrong year, got the grid reference wrong or have changed your mind about the identification. None of this is a problem.

You can only delete or edit your own records. Go into Explore my records and find the record of interest by sorting and/or filtering. See Chapter 15 on searching and filtering records to find it. In the unlikely case that you know the unique record number, it is easy, but it shouldn't take long. If you have just submitted the record, then go to the 'My records' page and it will be at the top of the list – easy.



ID	Source	Species	Common name	Taxon group	Site name	Date	Recorder	Images	Grid ref	
8956007	iRecord | general data	Anaspis (Anaspis) frontalis		insect - beetle (Coleoptera)	Winmarleigh and Cockerham Moss LWT Reserve	27/06/2018	Garland, Steve		SD446475	

On the right side are two symbols. Right click the pencil and paper symbol and choose 'Open link in a new tab'. This will open the full record in a new tab so that you keep the Explore page where it is and don't lose your original list. You can now edit the record. Once you have edited it scroll down and click the **Submit** button.

If you want to delete it click Delete record button.

If you send in an erroneous record from your phone app, you will have to edit it online later. Once it is sent in you can't edit it in the app.

USEFUL NOTE – If you entered records using 'Enter a list of records (for a site on a date) and you got anything wrong that is common to all the list of records (for example date) you only need to correct any one record and it will automatically correct all of the others. This is great and can save a lot of time. If you are worried about this, then you can click 'View all records in this sample' to see all the others.

My Records aren't being verified. *Also see: https://www.brc.ac.uk/irecord/records-verified*

All verifiers are experts in their field, but are all amateurs with other jobs, roles and responsibilities. Their verification may be limited to certain groups or taxa, or to specific geographical areas – or both.

Some verify material quickly and regularly; others may do it less frequently as they fit it in around other things.

Some groups may not have verifiers; other groups may only have verifiers for certain counties or regions (https://www.brc.ac.uk/irecord/records-verified).

iRecord verifiers are appointed in consultation with the national recording schemes, some of which work through networks of county recorders. Some schemes are happy to appoint teams of verifiers, others prefer to keep it to their existing pool of experts. If you are experienced with a particular group of species and would like to be involved with verification please contact BRC and they will put you in touch with the relevant recording scheme.

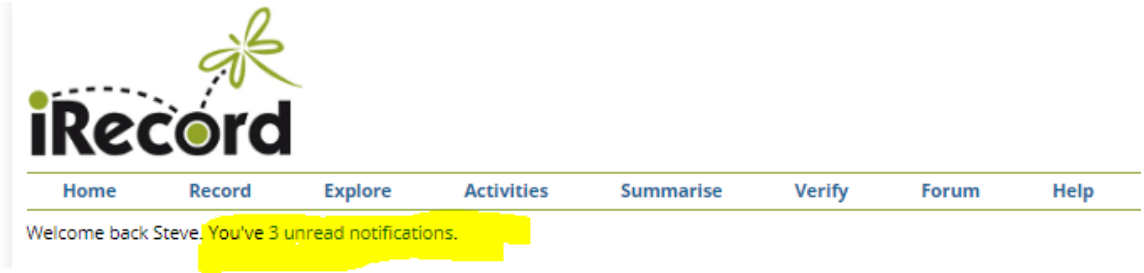
My record was rejected as being 'out of range' or for other reasons I don't understand.

The system has some automated processes to flag records that fall outside known ranges or are unusual in some way. These automated systems are primarily there to help Verifiers, especially when some may be

keeping on top of tens of thousands of records per year! Be patient – this automated response is only a holding response and hopefully a Verifier will process it in due course.

I have had notifications querying my records, what do I do?

Notifications may be emailed to you with a hyperlink back to your record, from which you wil be able to add comments or edit the record – but new ones are also visible at the top left of the Home screen.

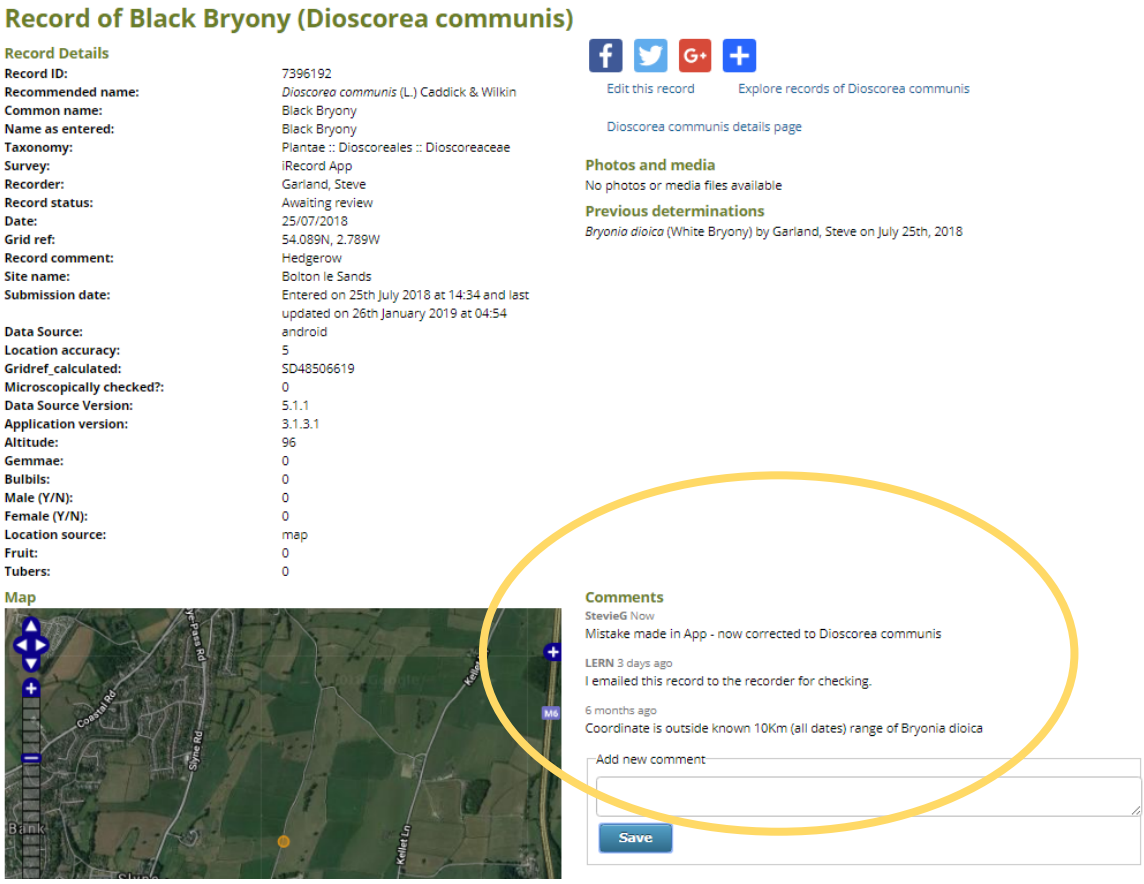


Click on the 'You've XX unread notifications'

The Notifications screen will open.

The top one was queried as the species is not known in the area. It was an error. To correct it – click on the first (pencil & paper) icon and edit the species, then Submit.

If you click the second (magnifying glass) symbol you'll see the whole record, plus the comments from the verifier. You also have a box where you can add you own comment – in this case an apology for selecting the wrong name in the iRecord App.



I have tried to enter a species name (or my site name) and after ages it hasn't pulled up any names.

This seems to happen sometimes, often when the screen has had no activity for a while. Reloading the page will usually 'free it up' again.

I have a box saying 'Leave site? Changes that you made may not be saved'.

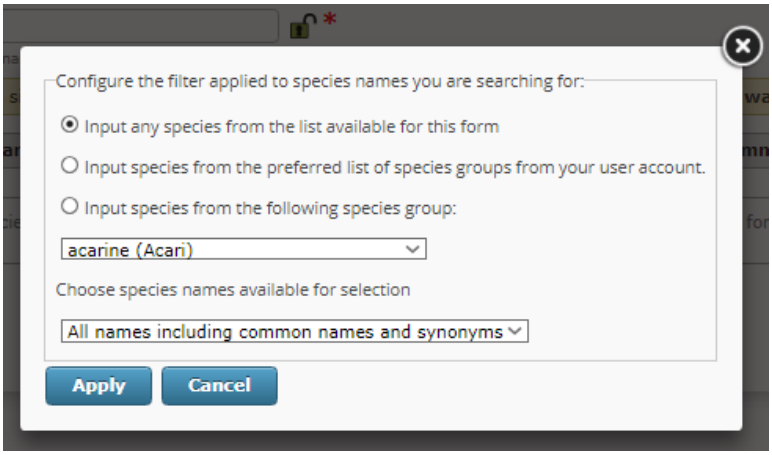
This box is just a failsafe to make sure you are not about to ditch a load of records you've just entered into a list and haven't submitted.

The species I am recording isn't in the list

The most likely reason is that you are using an old name. Scientific names often change as a result of the latest research. Click on the Filter funnel icon next to the word 'Species' at the head of the column. The box below will open. In the lower box choose **'All names including common names and synonyms'** – then **Apply**. Your old name will now work. However, it may be slower as it is checking many more possibilities for each entry. You can easily change it back afterwards to speed it up again.

Alternatively look up the latest name in a checklist or on the NBN Atlas site and use that.

If you need to add a species that has recently been added to the British list then you will need to contact BRC to get it added (and BRC will then liaise with the UK Species Inventory (UKSI) at the Natural History Museum.



The iRecord site won't load at all.

Maintenance may be taking place. Usually major upgrades etc that take down the system are notified in advance. The only solution is to revisit later.

Sometimes the site seems to be very slow. I suspect that this is when large data files are being uploaded or large tasks being processed. If it is really annoying you – best to try again later (this doesn't happen often).

CHAPTER EIGHTEEN

TOP TIPS & SOME FUN THINGS

Filters

Wherever you see the little Filter symbol  you can click in the white area under the heading name and type in terms to filter all the records in the table. Remember that the * symbol is a wildcard.

The best way to learn about this is to try playing with it in different ways.

To clear a filter – just delete your search word then hit the Enter key.

Right click – open in new tab

Get used to opening new pages with a 'Right Click' on the mouse rather than a normal mouse-click. There is a very good reason for this. If you run a filter or sort a table of records and then open a record to look, then click the 'Back' arrow, the screen will have reset to its initial unsorted or unfiltered state, so you would have to start all over again. If you haven't saved your filter, this can be extremely annoying!

If you get used to always opening a fresh tab (right click) you will avoid this problem.

Forum

This is where you can read about new announcements, how to do things, or to report issues or ask for help. Alternatively, and to report urgent problems, you can email the iRecord teamvia irecord@ceh.ac.uk

Help

This is where you can find the online information that is included in this document and quite a bit of stuff that isn't.

FUN STUFF

Recorder league *(as of April 2019 it is being replaced after a period when it often failed to work)*

Click **Explore** > **Recorder league**

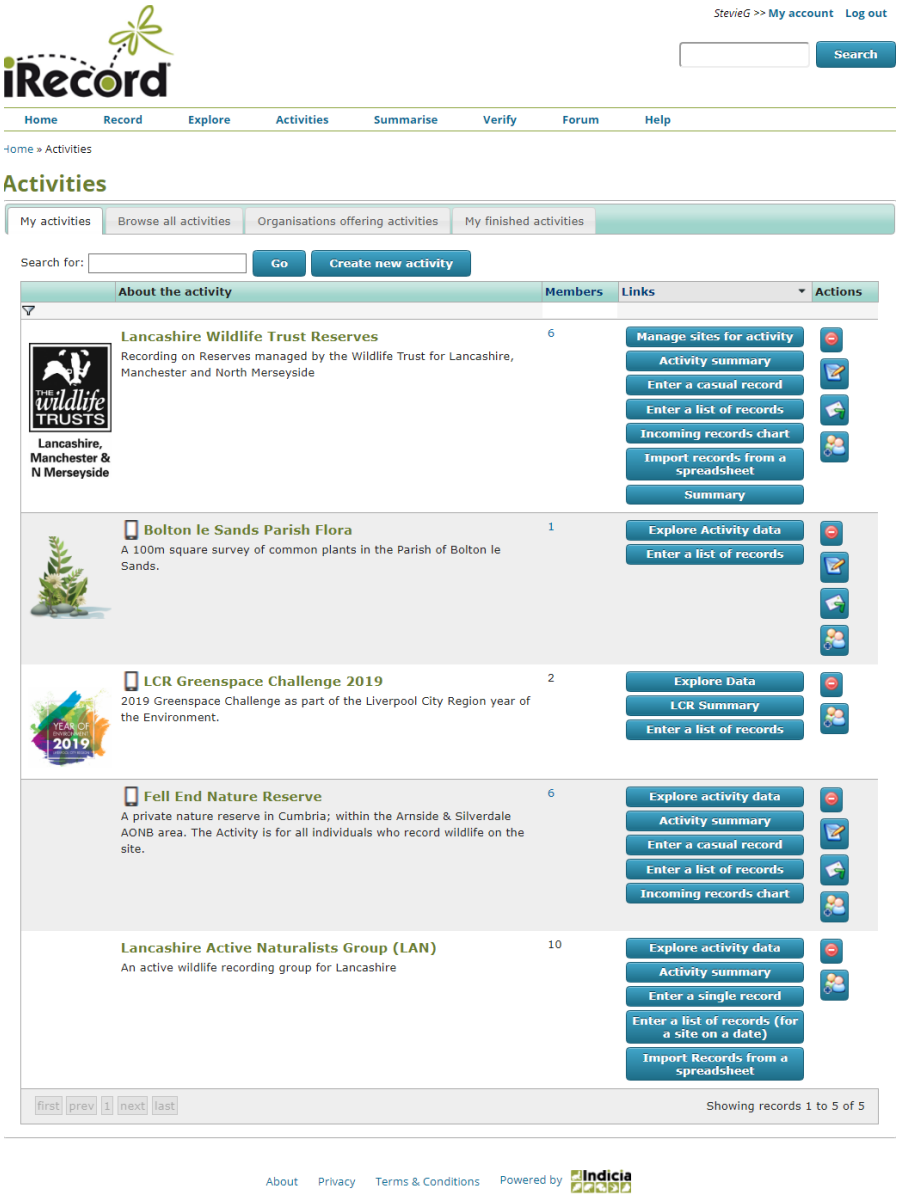
This lists all recorders contributing to iRecord, sorted according to either the number of records they have entered or the number of species they have entered records for. Just a bit of fun really – unless you are a 'pan-species recording' enthusiast with a competitive streak?

CHAPTER NINETEEN

ACTIVITIES

The Activities menu gives access to a wide range of activities, ranging from national recording schemes to one-off bioblitzes. A number of recording schemes (such as British Dragonfly Society) have their own activities, linked to specially-developed data entry forms tailored for their particular group. In addition, there are many local groups recording a single reserve or area.

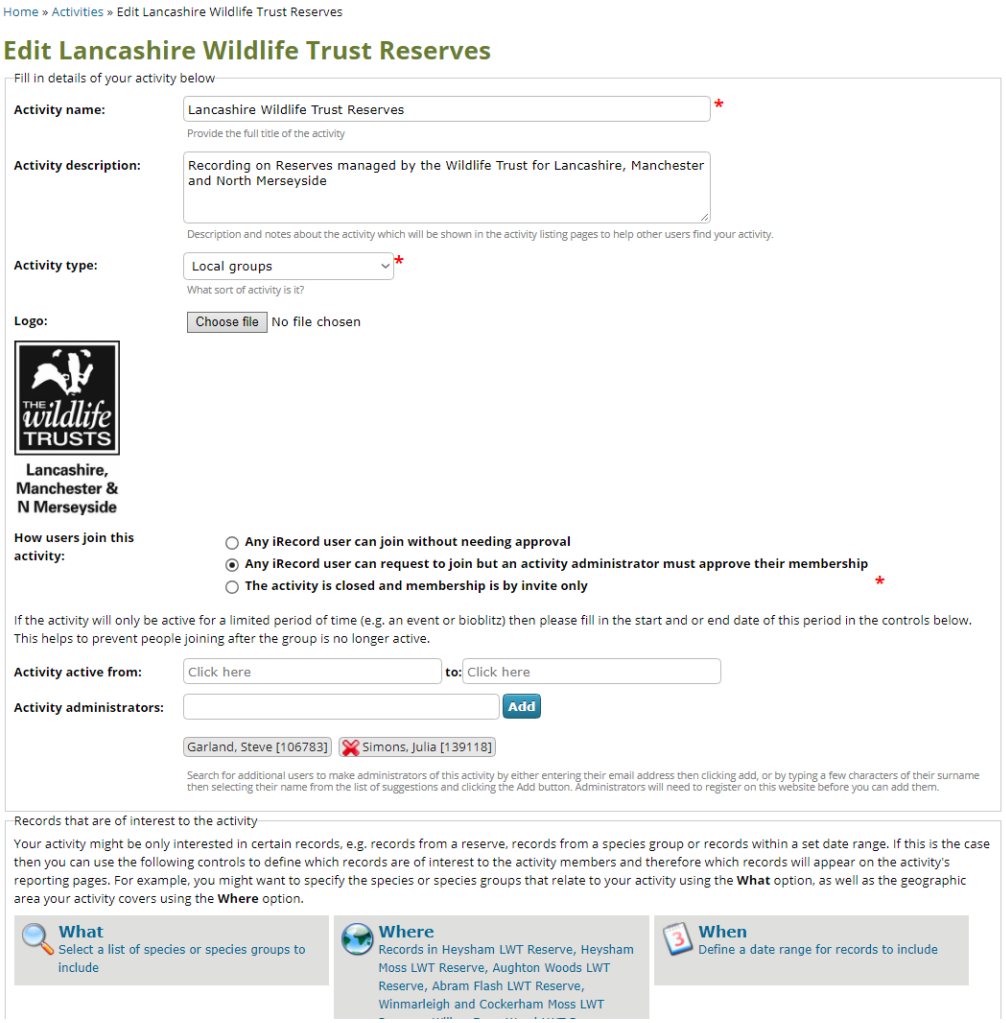
If you are part of a group recording on one reserve, an activity can let everyone join so that you can share each other's records and see what has been found. This is much easier than having to filter and sort records from the main database. You can also add boundaries and areas that everyone can use for recording – this is the only easy way (currently) to share site boundaries with others. An activity has to have at least one Administrator, only they can set up, and subsequently edit, details about the Activity. There are tabs for My activities, all activities, organisations and old, completed activities.

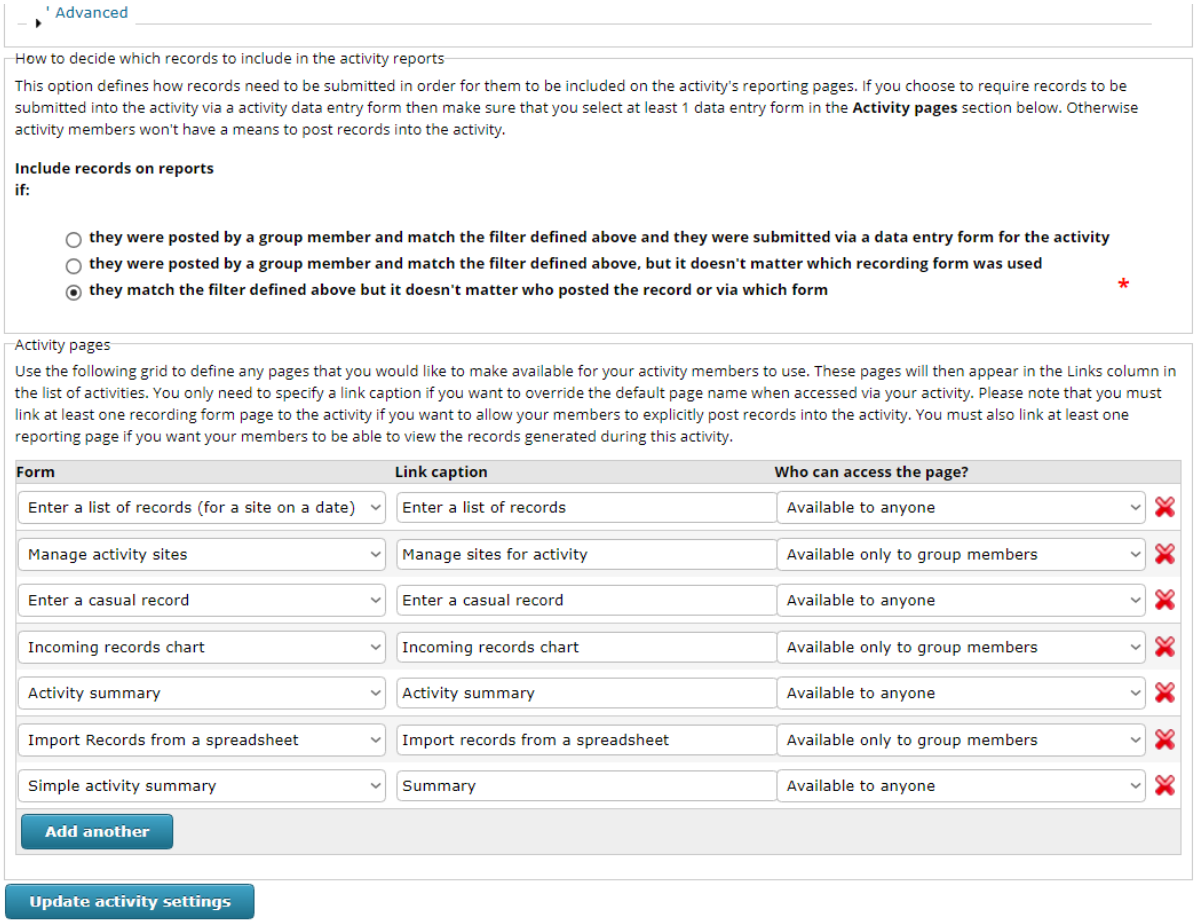


You can either search for a particular Activity you want to join or create a new one of your own. For a new Activity click the **Create new activity** button (above)

You can add or edit the following and the person creating it will be an Administrator by default (Administrators only can edit it in future):

- **Activity name**
- **Activity description** - free text description
- **Activity type –** choice of Events & bioblitzes; Local groups; National groups or Recording forms
- **Logo –** load your logo if you have one!
- **How users join the activity –** Open; on Request or Invite only
- **Activity active from –** start and finish date (if applicable)
- **Activity administrators –** the founder and any other recorders added as administrators. Always worth having more than one.
- **Records that are of interest –** lets you filter species or groups; geographical area or dates to include.
- **How to decide which records to include in activity reports –** can restrict reports to only members' records submitted through the Activity entry-forms; all members' records, or all records from all recorders that fit the Activity criteria (useful to see everything recorded from the site(s) or area.



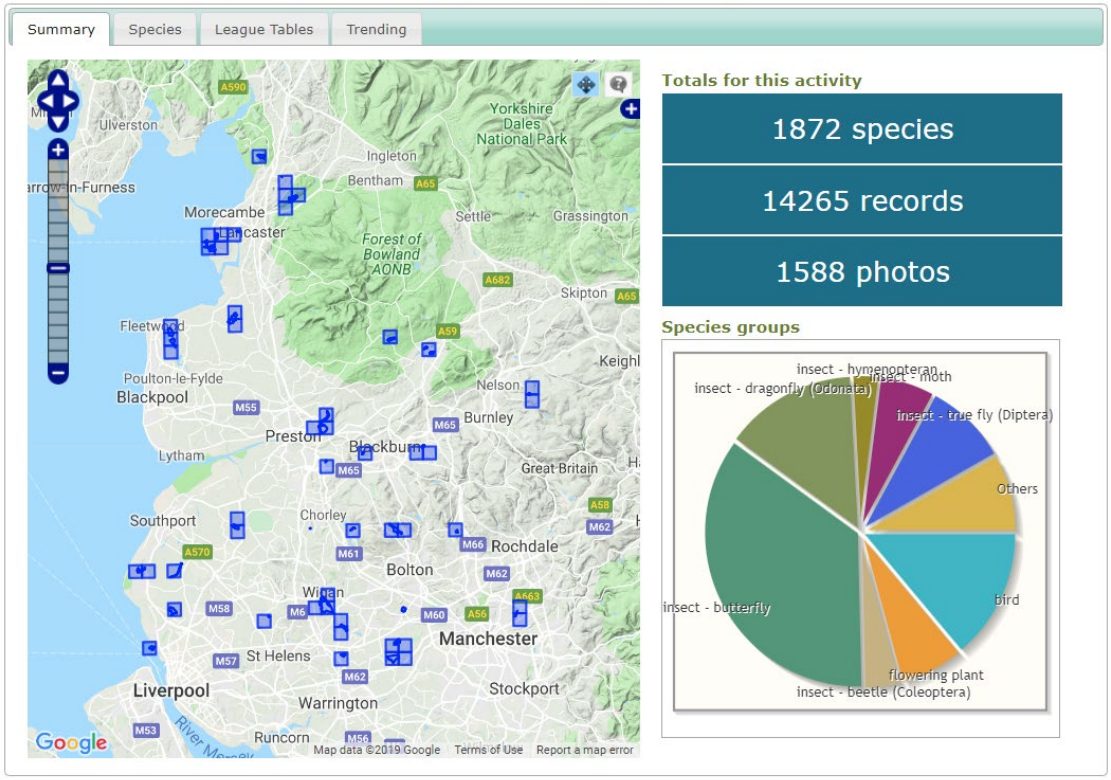


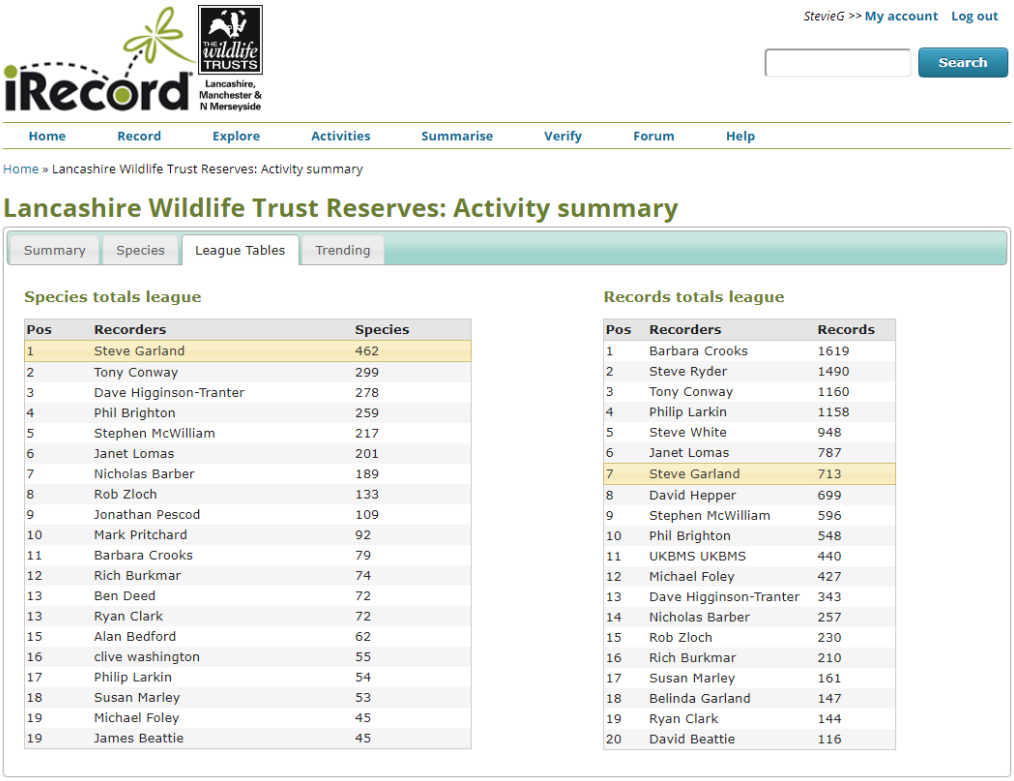
IMPORTANT NOTE – If you have created sites under My Sites you can now add these. *(The following page has a screen-grab of an Activity with multiple sites in Lancashire).* Click on the **Where** (grey box with globe icon). Then go to ***Choose an existing site or location*** **<Please select>** and select **My sites**…. In the box to the right of this you can now type in your site names and they will appear and can be selected. As each one is selected, click **Add** and it will appear with a red X. When recorders join your Activity, they will have immediate access to all your sites.

- **Which records to include in reports –** can restrict records to those from members, or include those from anyone that fit the Activity criteria (such as a site boundary)
- **Activity pages –** These will appear as buttons on the Activity page. Options include different ways of entering records and what sort of data and data analysis various people can see, set to everyone, members or administrators. You probably need to play with these to see which are of most use to your Activity. The list includes a number of obscure and specialised ones in addition to widely-used ones! You can add, edit or delete these buttons at any time.
- Don't forget to click **Update activity settings** button at the bottom to save settings. You will then get a screen **Send invites to join an activity** where you can add emails.

If you click the **Activity summary** button, the following screens among others will be available (depending on the site of course).

Lancashire Wildlife Trust Reserves: Activity summary



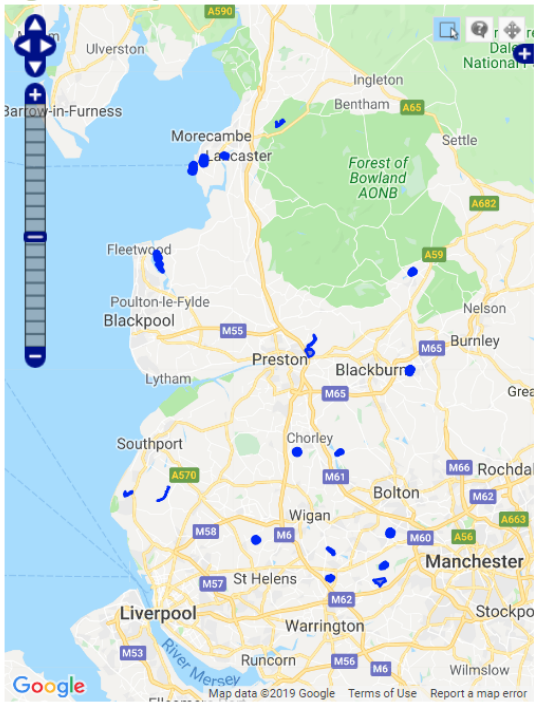


The **Manage activity sites** button will allow you to add, edit on remove sites from multi-site-based activities, as seen on the screen-grab below.

Lancashire Wildlife Trust Reserves: Manage activity sites

Site name	Map ref	Actions
Abram Flash LWT Reserve	SD613000	edit remove
Astley Moss LWT Reserve	SJ697976	edit remove
Aughton Woods LWT Reserve	SD543663	edit remove
Barnaby Sands LWT Reserve	SD350460	edit remove
Boilton, Red Scar & Tunbrook Woods LWT Reserve	SD582316	edit remove
Brockholes LWT Reserve	SD586307	edit remove
Burrows Marsh LWT Reserve	SD354448	edit remove
Cadishead Moss & Little Woolden Moss LWT Reserve	SJ697952	edit remove
Cross Hill Quarry LWT Reserve	SD745433	edit remove
Cutacre LWT Reserve	SD708026	edit remove
Dean Wood LWT Reserve	SD629153	edit remove
Foxhill Bank LWT Reserve	SD739279	edit remove
Freeman's Pasture LWT Reserve	SD56321541	edit remove
Freeman's Pools LWT Reserve	SD456614	edit remove
Freshfield Dune Heath LWT Reserve	SD294091	edit remove
Haskayne Cutting LWT Reserve	SD357089	edit remove
Heysham LWT Reserve	SD406599	edit remove
Heysham Moss LWT Reserve	SD423608	edit remove
Highfield Moss LWT Reserve	SJ 614956	edit remove
Holiday Moss LWT Reserve	SD497017	edit remove

first prev 1 2 next last Showing records 1 to 20 of 36



Add sites to the group

You can link sites to the group by either entering the details of a new site or by linking one of the sites you've previously created to the group.

Either **enter details of a new site**

Or, add an existing site:

<please select>

Add

There are two ways to benefit from all this as a member of the Activity. Either you can select the **Activity** at the top of a normal data entry screen – **Record Destination**. Click the drop-down and select the relevant Activity. ***OR*** you can automatically enter records into the Activity by going to the Activity then click the button on the right for Enter a casual record, …list of records or import from a spreadsheet.

Activities undoubtedly offer opportunities for collaborative working, but need careful thought and do have some limitations.

I suspect that this feature will be developed further in future as a more effective site-management tool. (I hope so!) There may also be additions to button options.

CHAPTER TWENTY

VERIFICATION

If you become a verifier there are additional screens that you have access to which allow you to Verify records, but this guide is not going to cover that. Verifiers are people who have expertise in particular area of identification, and often also are familiar with a particular area of the country. For example, I verify Neuroptera and allied groups for Cheshire, Lancashire and Cumbria. Verifiers are volunteers and do have lives to lead as well! Do remember this when waiting for them to verify your records. Neuroptera verifiers have hundreds of records to process, but hoverfly and butterfly (and other) recorders have tens of thousands to do, so be supportive of them and their vital work. Some verifiers can verify regularly, others may blitz a year of data at one go – be patient.

IMPORTANT NOTE – not all groups and areas of the UK have verifiers, so some records won't be verified at all at present. However, the records will sit there and can be verified at a future time as soon as a suitable Verifier is available.

There is a screen grab of a basic Verifier's page in Chapter 3 (p8).

Notifications

If you have notifications, a clickable note will appear on your iRecord Home page (top left) **'Welcome back Steve. You've 2 unread notifications'.** Notifications can also be sent to your registered email address – you can control this by going to **My account** – **Edit** – **Email digest notification settings** or **Advanced notification settings** (also see page 11, Chapter 4).

You will get notifications of two sorts – automatically generated ones and from Verifiers.

Auto checks - The automated ones can cause annoyance if you don't understand the process. If you record has been flagged as 'outside its known range' this probably just means it is a new 10km square – a positive thing. However, it can be useful for the Verifier to see these sometimes as they can make spotting real out-of-known-range records easier. **The auto-check is just a tool, not a final decision.**

Verifier notifications – These are generated by 'real humans' and are the important check. You will receive notifications about them. If records are queried or not accepted, the Verifier may sometimes explain why they decided on rejection. Sometimes they may ask a question before accepting the record. If you have further information, photos or a voucher specimen that could be sent for checking, you can tell them. Verifiers can update ID's if new information comes to light or if further checks can be completed.

You can open a record to view (using the 'magnifier' icon) and see all comments by the verifier. You can also reply or add more information. You could add another photo and send a note to help the Verifier make a decision. It is sometimes an opportunity to learn, but remember Verifiers may be busy people!

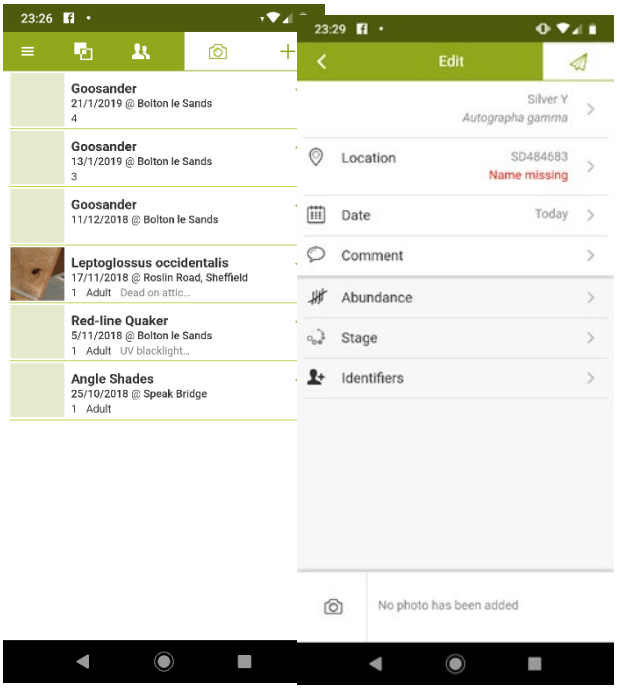
CHAPTER TWENTY-ONE

iRECORD MOBILE APP *(v4.0.1)*

Open the App.

The opening screen shows any existing records you added to the app.

Tap the '+' on the top right to add a new record.



Start typing in a species name – choices appear as you type. At any point you can select the appropriate species. Typing any part of the scientific or English names will pull up a list of choices. Playing with this will let you choose the best way for you to work. For Bellis perennis you can type 'b pere' and already the list will only be two species; or bellis, or daisy – the last has many choices containing the word 'daisy' though. (Note – as of March 2019 – the five letter code you can use on the web-based : 2 from genus, three from species names – does not work in the App.

Then tap your species entry and the full data entry screen opens

The location will be set automatically, based on your phone's GPS location

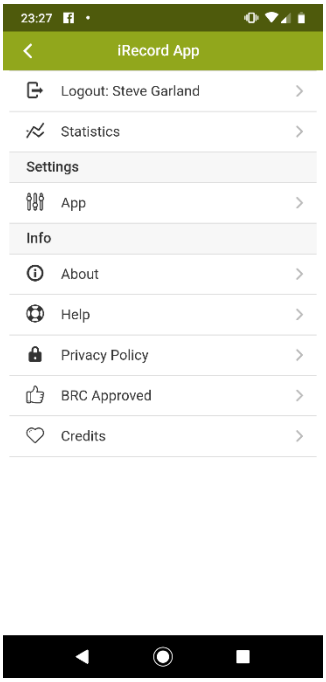
You can now enter location details by tapping Location – this opens a map showing your current location. If you don't want the satellite map you can tap the Layers icon (top right) and choose from Satellite, Ordnance Survey map or OpenStreetmap.

You can add free text comments, abundance details (there is a slider to choose a number or a list of choices), Stage (adult etc) and Identifiers (if others have helped with the identification).

If you want to add a photo – tap the camera logo at the bottom. You then choose between taking a photo or adding one you've already taken on your phone.

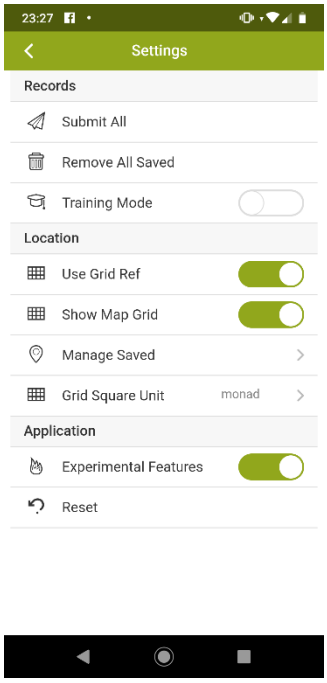
Alternatively, you can begin with a photo by tapping the camera icon instead of the '+' and following the instructions.

SETTINGS



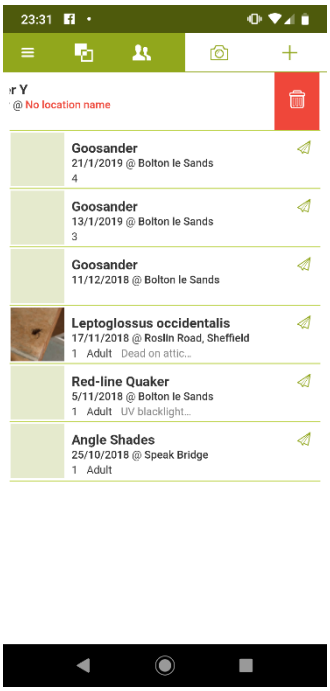
Select the menu icon at the top left of the opening screen (three horizontal lines). This opens the iRecord App menu.

- Logout – does what it says
- Statistics – shows your most frequently-recorded species
- Settings App – opens the screen below. This lets you
    - Submit all – sending in all your newly added records to the main iRecord site.
    - Remove all saved – lets you delete all the ones you've sent from your device
    - Training Mode – lets you use the phone App in training mode – as you can with the website App
    - You can turn on and off use of Grid References and showing the map grid
    - Manage Saved – lets you select, delete or edit your recently-used locations
    - Grid Square Unit – can be set to monad (1km) or tetrad (2km)
    - Experimental features (not certain what this does, but I keep it turned on!
    - Reset – resets all of these settings to default
- Help – this is the place to look if you need help using the App



If you make an error and want to delete an entry, swipe the record to the left – you will then see a red waste bin. Tap this to delete the record. It will warn you if you haven't sent it in.

IMPORTANT NOTE – This app lets you add new records and edit them PRIOR to you sending them in. Once you tap the arrow and send the record in to iRecord, you can no longer edit nor delete it in this app. You can only edit or delete it by accessing iRecord through a web-browser via *Explore – My records* – edit button – can be performed on any suitable device.



LISTS

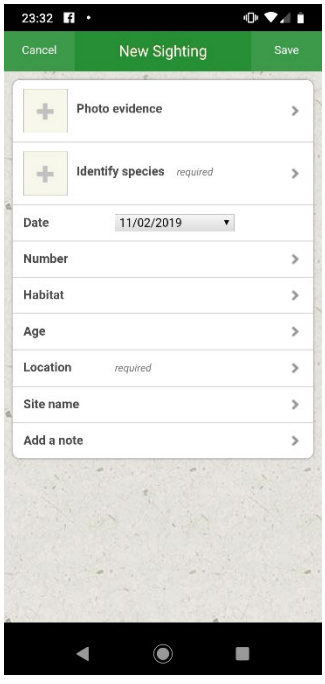
If you click the middle of the three icons on the upper-left green tab, you are taken to the Lists page. At present (April 2019) this only supports plant recording. It is set up to enter lists of plant species for an individual 1km square (monad). Its use is for mapping projects where species are being logged at the 1km square level. If this is the sort of recording you are doing, and you are only recording plants, this may be of use.

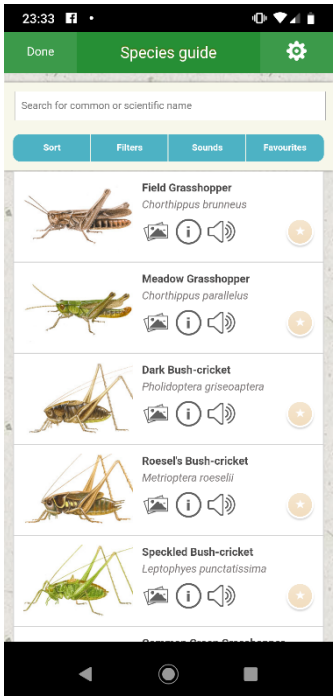
Group-specific Apps

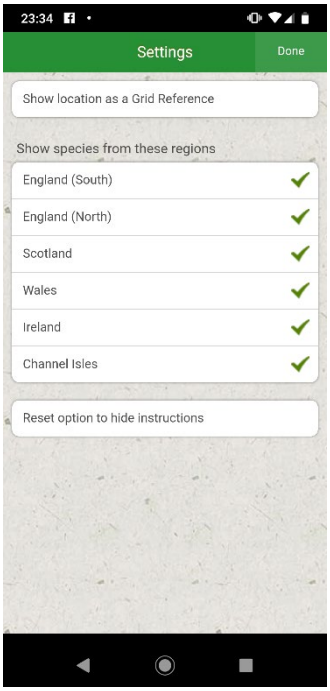
There are currently Apps available for grasshoppers/crickets (Orthoptera) and butterflies. These operate exactly as the general App, but have specific information to help you identify species (including audio of grasshopper calls) and pictures. Both Apps let you deselect areas of the country under settings. This removes species that don't occur in the region to make recording simpler.

Both apps also allow more accurate recording of habitat and stage/age than the basic App, but are basically the same.

Again – once the record has been sent in to iRecord, you can only edit it on the website.







There are other iRecord apps available including:

- iRecord Soil – Centre for Ecology & Hydrology – experimental app aimed at getting farmers to map their soils – aiming to map soils nationally and to advance farming practice

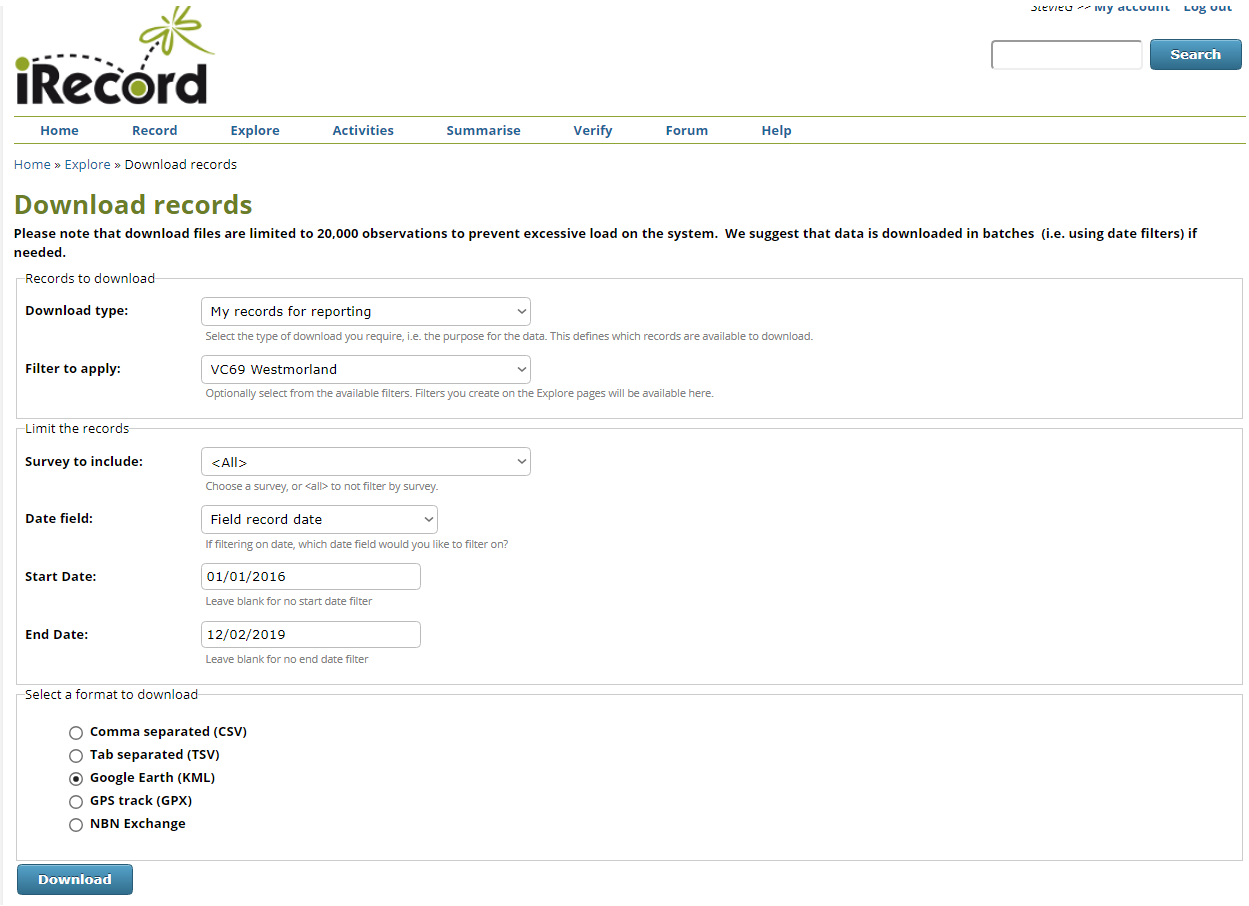
CHAPTER TWENTY-TWO

DOWNLOADING DATA & REPORTS

You can only download your own records. However, you can download your full data set if you want. You may want to do this occasionally to keep your own backup of your data.

Click **Explore** – **Download**

You then see the following screen.



Download type has a dropdown offering 'My records for reporting' and options relating to any Activities that you have set up or joined. For each of these you can choose between 'My records added using a recording form for an Activity'.

If you are an **Administrator** for the Activity, you can download all records entered by **all** Activity members who used the recording form for the Activity.

Filter to apply – you can choose **'all available records'** to get everything or use one of your **filters** that you created earlier on **Explore** pages.

Survey to include – Leave this as <All> unless you want to restrict the records to one survey – an example is 'iRecord > Earthworm Survey'. The advantage of using this is that a download for a particular activity may include columns of data not available in a normal list of records. If you want custom attributes, you must use download using specific surveys

Date field – this allows you to choose which date field to filter by. Choices are:

1. Field record date – the date the record was made
2. Input date – the date you entered the record onto iRecord and saved it
3. Last changed date – the date you last altered and saved any changes to the record
4. Verification status change date

Field record date The first will let you sort all records made in a particular period – for example all those made in 2018

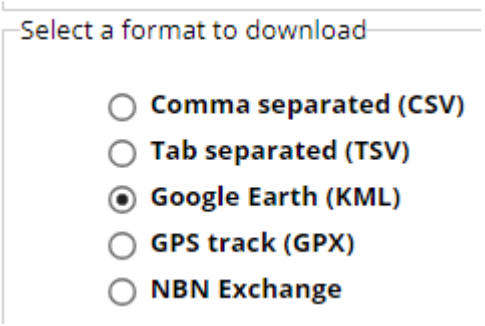
Input date will let you sort all records that you entered in a particular period. This would enable you to send an updated list for a year of recording if you've added a few more records from your notebook for the same period.

Last changed date is useful if you've already sent your records to someone for the previous year, but know that you've corrected a couple of identifications since.

Verification status change date will let you find any changes made since a particular date. This may be of use on occasion.

Start Date & End Date – These let you choose your period of interest. Click on the box and you get the usual iRecord calendar to click on.

Select a format to download – gives you the choice on the right.

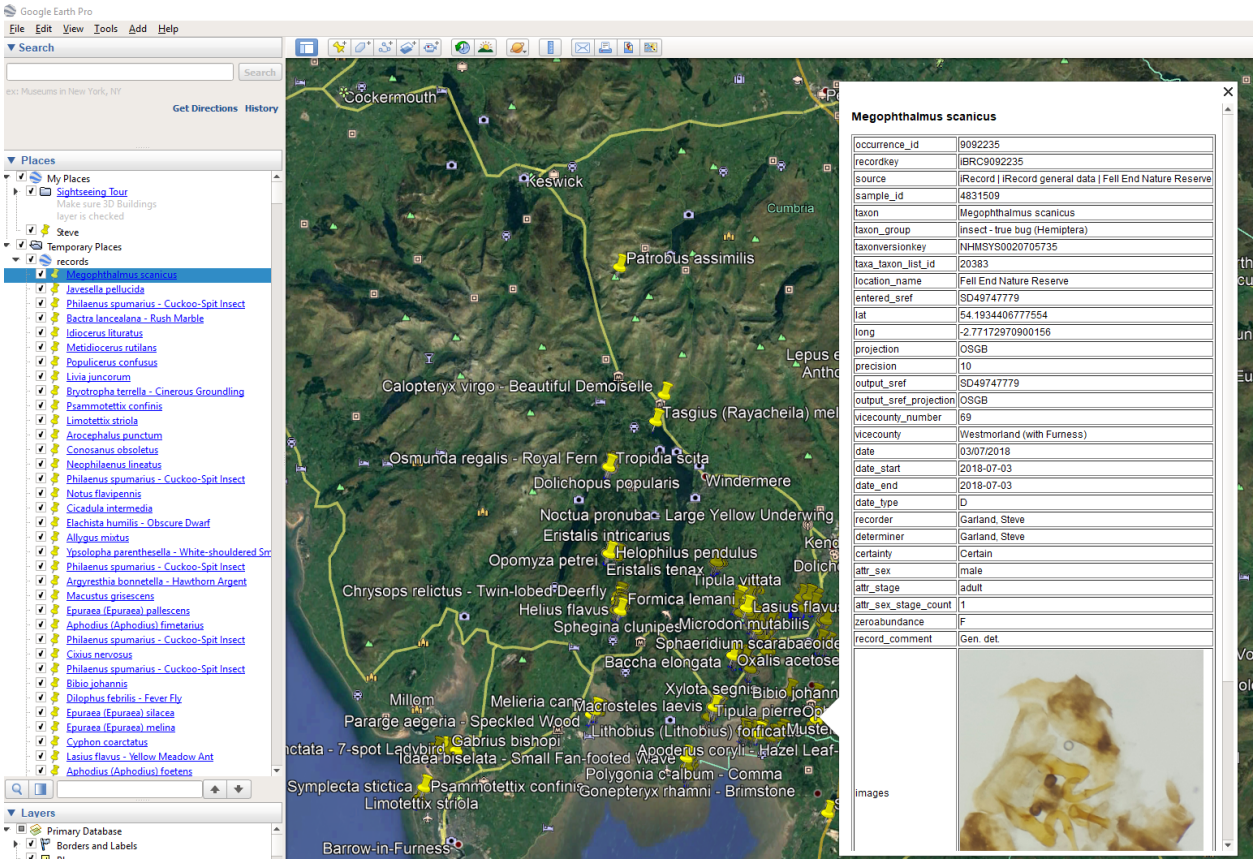


CSV and TSV are files used to transfer data between spreadsheets and databases. CSV files are used as a standard way to import into spreadsheets such as Excel, LibreOffice Calc or Google Sheets. You can sort and reformat them in a spreadsheet and then import them into other recording packages, such as MapMate and Recorder.

Google Earth (KML) will download a file that can then be imported into Google Earth. In Google Earth click File – Import – find and select your file. All the records will then appear under - Temporary Places – Records. Each will have a coloured square, a pin and a label (species name). If you click on the species name either in the menu list or on the map – the full record will open in a window. An example of a Google Earth import can be seen on the next page – the map can get quite busy, but I can see potential in reviewing for example where you've recorded froghoppers in the last 5 years? It is quite fun and interactive.

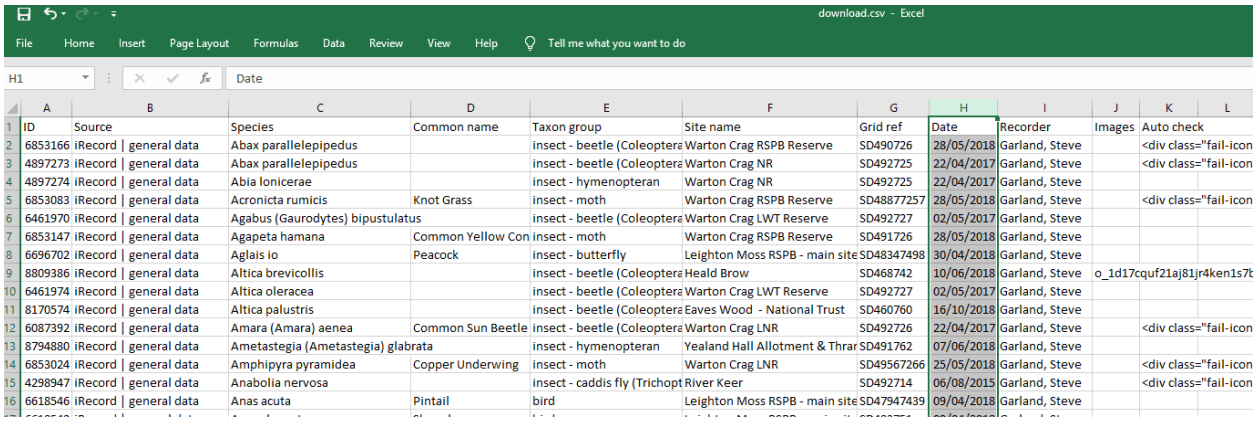
GPS track (GPX) – are files that can be imported into GPS software. If you use a GPS App on your tablet or phone it would let you carry data around with you, which might be of value when in the field.

NBN Exchange – is an **out-of-date format** to allow records to be imported into the National Biodiversity Network. This was for advanced users with access to the NBN, such as those running National Recording Schemes. **It will be removed in the near future.**



Other download options

From the **'Explore my records'** page you can apply a filter and/or sort the records. In the bottom right-hand corner of the list it says 'Showing records 1 to 20 of xx' then 'Download this report'. If you click this it will download a CSV file with the default name of download.csv. You can rename this and save it wherever you want. It has a standard format (as below) in Species alphabetical order, but does not contain all of the data for each record – only the main elements. As such it is of limited use when trying to export to other databases. However, if you want a quick list of records filtered in some way it is perfect.



	A	B	C	D	E	F	G	H	I	J	K	L
1	ID	Source	Species	Common name	Taxon group	Site name	Grid ref	Date	Recorder	Images	Auto check	
2	6853166	iRecord | general data	Abax parallelepipedus		insect - beetle (Coleoptera	Warton Crag RSPB Reserve	SD490726	28/05/2018	Garland, Steve		<div class="fail-icon	
3	4897273	iRecord | general data	Abax parallelepipedus		insect - beetle (Coleoptera	Warton Crag NR	SD492725	22/04/2017	Garland, Steve		<div class="fail-icon	
4	4897274	iRecord | general data	Abia lonicerae		insect - hymenopteran	Warton Crag NR	SD492725	22/04/2017	Garland, Steve			
5	6853083	iRecord | general data	Acronicta rumicis	Knot Grass	insect - moth	Warton Crag RSPB Reserve	SD48877257	28/05/2018	Garland, Steve		<div class="fail-icon	
6	6461970	iRecord | general data	Agabus (Gaurodytes) bipustulatus		insect - beetle (Coleoptera	Warton Crag LWT Reserve	SD492727	02/05/2017	Garland, Steve			
7	6853147	iRecord | general data	Agapeta hamana	Common Yellow Con	insect - moth	Warton Crag RSPB Reserve	SD491726	28/05/2018	Garland, Steve			
8	6696702	iRecord | general data	Aglais io	Peacock	insect - butterfly	Leighton Moss RSPB - main site	SD48347498	30/04/2018	Garland, Steve			
9	8809386	iRecord | general data	Altica brevicollis		insect - beetle (Coleoptera	Heald Brow	SD468742	10/06/2018	Garland, Steve		o_1d17cquf21aj81jr4ken1s7t	
10	6461974	iRecord | general data	Altica oleracea		insect - beetle (Coleoptera	Warton Crag LWT Reserve	SD492727	02/05/2017	Garland, Steve			
11	8170574	iRecord | general data	Altica palustris		insect - beetle (Coleoptera	Eaves Wood - National Trust	SD460760	16/10/2018	Garland, Steve			
12	6087392	iRecord | general data	Amara (Amara) aenea	Common Sun Beetle	insect - beetle (Coleoptera	Warton Crag LNR	SD492726	22/04/2017	Garland, Steve		<div class="fail-icon	
13	8794880	iRecord | general data	Ametastegia (Ametastegia) glabrata		insect - hymenopteran	Yealand Hall Allotment & Thrar	SD491762	07/06/2018	Garland, Steve			
14	6853024	iRecord | general data	Amphipyra pyramidea	Copper Underwing	insect - moth	Warton Crag LNR	SD49567266	25/05/2018	Garland, Steve		<div class="fail-icon	
15	4298947	iRecord | general data	Anabolia nervosa		insect - caddis fly (Trichopt	River Keer	SD492714	06/08/2015	Garland, Steve		<div class="fail-icon	
16	6618546	iRecord | general data	Anas acuta	Pintail	bird	Leighton Moss RSPB - main site	SD47947439	09/04/2018	Garland, Steve			

You can also produce reports from the **My sites** screen.

Choose a site and click the explore button next to it under Actions. You will then see a list of all the records for the site. In the bottom right corner, it tells you haw many records there are and gives an option to download this report. Click this and you get another CSV file – format as above.

CHAPTER TWENTY-THREE

IMPORTING DATA FROM A SPREADSHEET

Importing records to iRecord from a spreadsheet

Version 3.2 compiled by Martin Harvey at 12 February 2018

If you have wildlife records in a spreadsheet it is possible to import them all in one go to iRecord if you wish to do so, as an alternative to entering them directly onto the iRecord website or app.

IMPORTANT NOTE – READ BEFORE YOU IMPORT SPREADSHEET DATA.:

If you need to import large amounts of data (10,000 records or more) please contact iRecord first – large imports need to be scheduled so as not to disrupt iRecord for general use.

If you are dealing with new records that have not been sent in to recording schemes it's fine to import them. **If your spreadsheet contains records that have been sent in to schemes before** then we would prefer you **not** to import them, as the recording scheme verifiers will have to spend time checking them again and duplications may result. If in doubt, please check with the relevant scheme organisers first, or contact irecord@ceh.ac.uk

1. Your spreadsheet

Your spreadsheet needs to have a single row per record, with the first row for the headings to give each column a label. The minimum requirement is to have at least five or six columns to show the species name; the location name; the grid reference; the date; the 'recorder (name of the person who made the record); and the
'determiner' (name of the person who identified the species, if that was someone different from the recorder).

You can add extra columns as well. For example, it is often useful to know how many of each species was seen, and for some species groups it is important to note whether it was an adult, juvenile or other life stage that was seen. It doesn't matter what words you use for your column headings, as long as you are clear what each column means – you can match your column headings to iRecord's equivalent during the import (see step 4 below).

A typical spreadsheet set-up:

	Species	Site name	Grid ref	Date	Recorder	Determiner	Sex	Stage	Number seen	Comment
2	Orange-tip	West Wood	SU479018	29/05/2016	Martin C. Harvey	Martin C. Harvey	male	adult	2	
3	Clouded Yellow	West Wood	SU479018	18/08/2015	Martin C. Harvey	Martin C. Harvey		adult	1	
4	Erynnis tages	West Wood: meadow area	SU47690195	29/05/2016	Martin C. Harvey	Anne Expert		adult	3	fying near main track
5	Lycaena phlaeas	West Wood	SU479018	18/08/2015	Martin C. Harvey	Anne Expert		adult	2	
6	Lycaena phlaeas	West Wood: meadow area	SU47690195	18/09/2015	Martin C. Harvey	Martin C. Harvey		adult	3	
7	Meadow Brown	Sandy Heath	SU5611	24/06/2016	Martin C. Harvey	Martin C. Harvey		adult	25	On knapweed flower
8	Marbled White	Sandy Heath	SU566114	18/08/2015	Martin C. Harvey	Martin C. Harvey		adult	12	In long grass to east
9	Common Blue	Sandy Heath	SU5611	18/08/2015	Martin C. Harvey	Martin C. Harvey	female	adult	4	
10										

Make sure that the first row of your spreadsheet contains the column headings – don't put a title or any other information above the headings row. Before you can upload your spreadsheet to iRecord, you have to 'save as' a comma-separated-values text file (CSV file) – it is the CSV file that can be imported to iRecord.

Some of the columns will only import if their contents match what iRecord is expecting. For instance, the species names can be scientific or English names, but they have to match the names that iRecord uses, which are taken from the UK Species Inventory, see: www.nhm.ac.uk/our-science/data/uk-species.html

Some of the other columns such as Stage and Sex also have to match a predefined set of terms – see the termlists at the end of this document.

2. Doing a test import

The import process can be complex, and once you commit to importing your records (at the end of step 4 below) there is no turning back! If you wish, you can do a test import before doing it for real. To do a test you need to put your iRecord account into "training mode" (see www.brc.ac.uk/irecord/training-mode for how to do this).

Once you have set your account to Training mode, any records that you import will only be saved as training records, and will not be visible to others. Once you are happy with how the import process works you can take your iRecord account out of training mode and do the import again for real.

3. Importing into iRecord

Log on to iRecord[1] and go to this link: http://www.brc.ac.uk/irecord/import-records

There is some information on that page about the import process. It suggests that you should download a template file and use that for your records, but there is no need to do this. As long as your spreadsheet records are organised into a format similar to that shown above you should be able to import them.

If you do want to use the iRecord template click on: 

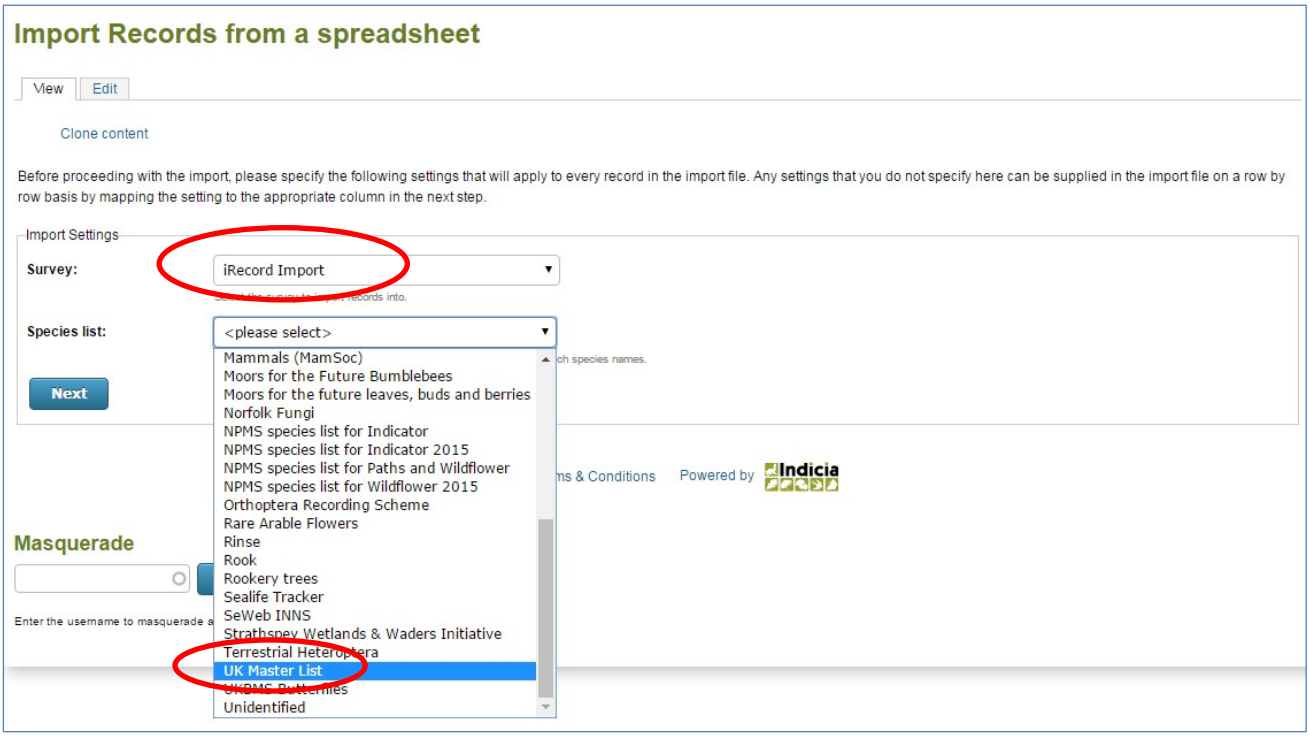
Alternatively, click 

to import an existing CSV file and then match your column headings to those that iRecord recognises. On the next page, click on "Choose file" and tell iRecord where your CSV file is saved on your computer, and then click on "Upload" to start the import process:

[1] See Appendix 4 for more about options for logging on before you import records

On the next page you need to specify which "Survey" you want to import your records into, by selecting from the dropdown list. In most cases you should choose "iRecord Import" unless you have a specific need to use a different Survey. (For example, some recording schemes have a custom recording format set up in iRecord any may prefer to import records into that format – if in doubt about which Survey to use contact irecord@ceh.ac.uk).

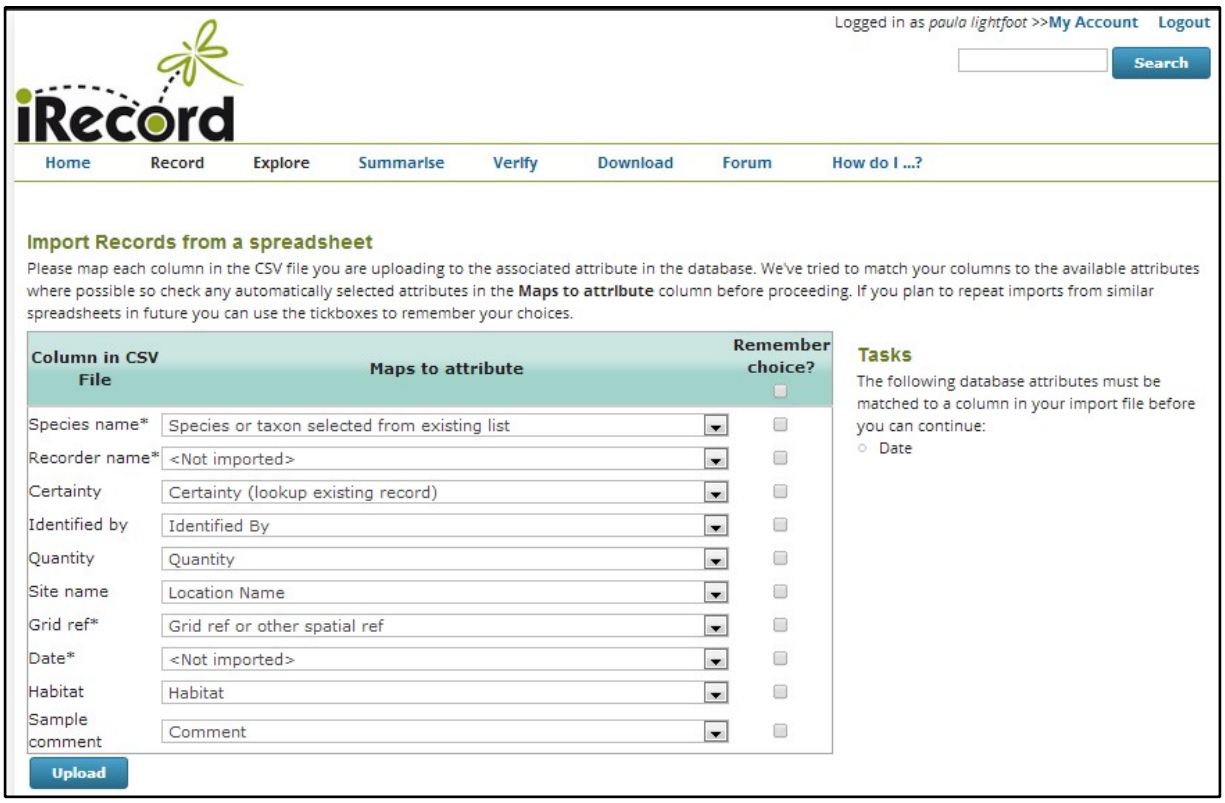
Also on this page you need to choose the "Species list" that you will be using – for standard records you should always use "UK Master List":



Once you have filled in the two boxes, click **Next** and you will come to a screen where you can match the column headings in your CSV file to the fields in iRecord.

4. Matching your columns to iRecord's attributes

The column headings from your CSV file are shown on the left of this page, and you have to tell iRecord how to match your headings to the choices from the dropdown lists under "Maps to attribute".



Click on the down arrow next to each field to ensure they are matched correctly. There are a lot of iRecord attributes to choose from, and it can be difficult to know which attribute to choose – if in doubt please contact irecord@ceh.ac.uk for advice. Here are the most frequently used options, and note that many of the possible attributes can be ignored (if you think you need to use one of these grey "Ignore" attributes please contact us) – be particularly careful to choose the correct matches for the recorder and determiner names:

Type of data from import	**iRecord attributes**
	Occurrence
Ignore	Use determinations table for identification information (Y/N)
Any comment for an individual record (compare with "Comment" under "Sample" below)	Comment [= Occurrence Comment]
Ignore	Confidential
Ignore	Downloaded flag
Ignore	Downloaded on
If you are importing records from another system that gives each a record unique ID, you can import that ID here	External key
Ignore	Created by (from controlled termlist)
Ignore	Determiner (from controlled termlist)

The species name – can be scientific or English but must match the UKSI names that iRecord uses	Species or taxon name
If you use Taxon Version Keys you can import them ***instead of*** the spec name – otherwise ignore	Species or taxon external key (from controlled termlist)
Ignore	Species or taxon search code (from controlled termlist)
Ignore	Updated by (from controlled termlist)
Ignore	Verified by (from controlled termlist)
Ignore	Last verification check date
Ignore	Record decision source
Ignore	Record substatus
Ignore	Release status
Ignore	Sensitivity precision
Ignore	Training
Ignore	Verified on
Ignore	Zero abundance
	Occurrence media
Ignore	Media Caption 1
Ignore	Media Caption 2
Ignore	Media Caption 3
Ignore	Media Caption 4
Ignore	Media Path 1
Ignore	Media Path 2
Ignore	Media Path 3
Ignore	Media Path 4
	Occurrence custom attributes
Can import if needed – has to match predefined terms, see Appendix 1 termlists below	Certainty (from controlled termlist)
Ignore	Determination reference
Ignore	Determination year
Ignore [use "Identified by" instead]	Determiner
Ignore	Identification type (from controlled termlist)
This is for the determiner, the person who identified the species (**do not use** the "Determiner" attribute!)	Identified By
For method terms that apply to individual records (compare with "Sampl method" and "Method (free text)" below) – has to match predefined term see Appendix 1 termlists below	Observation Type (extensive) (from controlled termlist)
Can be a number or text	Quantity
Has to match predefined terms, see Appendix 1 termlists below	Sex (from controlled termlist)
Has to match predefined terms, see Appendix 1 termlists below	Stage (extensive) (from controlled termlist)

Type of data from import	**iRecord attributes**
	Sample
Any comment that applies to a whole sample or set of records (needs to be supplied for each imported record) (compare with "Comment" under "Occurrence" above)	Comment [= Sample Comment]
In format dd/mm/yyyy	Date
An alternative to supplying the standard "Date"	Day (Builds date)
	Month (Builds date)
	Year (Builds date)

An alternative to supplying the standard “Date”, and can be used for date ranges, but the correct “Date type” code must be supplied, see Appendix 2 below	Date end
	Date start
	Date type
An Ordnance Survey grid reference (please contact us if you need to use lat/long or another system)	Grid ref or other spatial ref
If you are importing records from another system that gives each sample (set of records) a unique ID, you can import that ID here	External key
Ignore	Created by (from controlled termlist)
Ignore	Group (from controlled termlist)
Ignore	Licence (from controlled termlist)
Ignore	Location (from controlled termlist)
Ignore	Location Code (from controlled termlist)
If you are importing records from another system that gives each location a unique ID, you can import that ID here	Location external key (from controlled termlist)
Ignore	Parent (from controlled termlist)
Ignore	Parent sample external key (from controlled termlist)
For method terms that apply to samples/sets of records (compare with “Observation type” above and “Method (free text) below) – has to match predefined terms, see Appendix 1 termlists below	Sample method (from controlled termlist)
A free text field for method terms (does not have to match a predefined list) – compare with “Observation type” and “Sample method”, above	Method (free text)
Ignore	Updated by (from controlled termlist)
Ignore	Verified by (from controlled termlist)
Ignore	Input form
Site name or location name, preferably a recognised name e.g. from an OS map, but any text can be imported	Location name
Ignore	Privacy precision
Ignore	Record status
Ignore [use “Recorder Name” instead]	Recorder names
Ignore	Verified on
	Sample custom attributes
Habitat – has to match a predefined list such as EUNIS (this is complex, please contact us if you need to use this)	EUNIS Habitat
A free text field for habitat	Habitat
This is for the recorder, the name of the person who made the record (**do not use** the “Recorder Names” attribute!)	Recorder Name
iRecord automatically calculates the vice-county (VC) for each imported grid reference, so you don’t have to import the VC, but you can do so if you wish. You must have the VC numbers (not names) in your spreadsheet – see http://www.brc.ac.uk/article/british-vice-counties	Vice County (supplied)

Once you have matched all your column headings to iRecord attributes, click on **Upload** and the loading will start. You will see a progress bar. If any records fail to import you will be able to download a CSV file giving the reason for failure. Typically this will be due to species names not matching names in the UK Species Inventory, or habitats not matching names in the classification systems used in iRecord, for example. If possible, you should edit and correct this downloaded set of failed records and then re-import them (but only re-import the failed records, don’t import the whole dataset again).

If you have any questions or encounter any difficulties, please contact us on irecord@ceh.ac.uk

Appendix 1: iRecord termlists

As shown in section 4, for some attributes there are termlists used in iRecord, and if you want to import your data into these attributes you have to make sure that the terms in your spreadsheet exactly match the terms available in iRecord, as shown below. (If you have a need to import a term that isn't in these lists please contact irecord@ceh.ac.uk – we can't always add new terms but we are happy to consider doing so.)

Certainty

Term
Certain
Likely
Uncertain

Observation type

Term
Actinic moth trap
Call
Field sighting
Field identification
Field sign
Fungal gall
Insect gall
Leaf mine
light trap
Other gall
Robinson moth trap
Other
Caught
Collected
Field record
Flying
Nest
dung/droppings/frass/pellet, etc.
voucher specimen, trapped (other)
voucher specimen

Sex

Sample method

Term
Unknown
Field Observation
Quadrat
Transect
Net
Pitfall Trap
Light Trap
Transect Section
Parent sample
Child sample
Timed Count
Timed Count Count
TreeInitialRegistration
TreeVisit
Garden Bird Survey count
Visit
Seasearch buddy pair
Seasearch habitat
Grid square
Light
Actinic Light
Daytime observation
Dusking
Attracted to a lighted window
Sugaring
Wine Roping
Beating tray
Pheromone trap
Other method (add comment)

Stage

Term
not recorded
male
female
mixed

Term
Adult
Teneral
Pupa
Larva
Immature
Nymph
Larval web
Larval case
Leaf-mine
Egg
Other
Exuvia
Flowering
Fruiting
Gall
Not recorded
Spawn
Vegetative
Juvenile
Tadpole
Nest
Mature
Seedling

Appendix 2: Importing date ranges into iRecord via a CSV upload

A. Sets of records that don't contain date ranges

If all your records are from individual days, and you haven't used any date ranges, then you can just use the date column in your CSV file and import that column into iRecord's "Date" field.

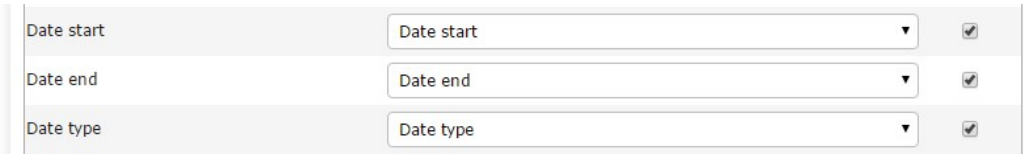
B. Sets of records that do contain date ranges

If any of the records in your spreadsheet are linked to a date range (e.g. if they were entered just as a year rather than an individual date, or used a range from one day to another), the data set will need to be treated differently. You will need a column for the start of the date range (which you will import into iRecord's "Date start" attribute), and another for the end of the date range (which you will import into iRecord's "Date end" attribute). In addition, you will need to add a "Date type" column.

Any single-day records need to have "D" in the Date type column, but any date ranges will need to be coded by you, using the following "DateType" codes:

DateType	Description	Examples:	
		StartDate	EndDate
D	Date specified to the nearest day.	16/06/2016	16/06/2016
DD	Date specified to a number of days.	16/06/2016	18/06/2016
O	[This is a capital "O", not a zero] Date specified to the nearest month (first day of the month to the last day of the month)	01/06/2016	30/06/2016
OO	[These are capital "O"s, not zeros] Date specified to a range of months (first day of the start month to the last day of the end month)	01/06/2016	31/07/2016
Y	Date specified to the nearest year (first day of the year to the last day of the year)	01/01/2016	31/12/2016
YY	Date specified to a range of years.	01/01/2012	31/12/2015

Once you have the data arranged correctly in your CSV file, you can upload it us usual, taking care to match the date fields when you get to the "field mapping" part of the import:



Appendix 3: Spreadsheet template for importing records to iRecord

This is the format of the spreadsheet template that you can download from http://www.brc.ac.uk/irecord/import-records

As explained above, there is no need to use this template unless you wish to, iRecord is very flexible in the formats that can be used.

Columns with an asterisk are mandatory.

Species name*	**Recorder name***	**Certainty**	**Identified by**	**Quantity**	**Site name**	**Grid ref***	**Date***	**Habitat**	**Sample comment**
Must match a scientific or vernacular species name in the UK Species Inventory	*Ideally as "Surname, First-name", but any text is accepted*	*Certain, Likely or Uncertain*		*Can be a number or can be text*			*dd/mm/yyyy (or a 'vague date' e.g. June 2013)*	*Must match a field from an existing iRecord survey e.g. Phase 1, Eunis, JNCC Biotopes*	

Appendix 4: Imports and iRecord accounts

When you import records into iRecord, the records will be allocated to the iRecord account that is signed in at the time of import. In other words, if you log on to iRecord and import some records, those records will be 'owned' by your account.

If your spreadsheet contains records from recorders other than yourself those records will be imported, and the recorder name will show as the name you imported, but the record will still be linked to your account and will be counted as 'yours' for the purposes of calculating the total number of species you have seen in the iRecord league tables, and for display under "My Records".

If you regularly import records that originate from recorders other than yourself, you may wish to set up a second iRecord account that you use for import purposes. This will still make the records available within iRecord, but they will be kept separate from your own personal records. This may be particularly relevant if you are a recording scheme organiser who needs to import records sent in as spreadsheets by recorders who do not use iRecord themselves.

You can set up a second iRecord account with any user name as along as it has its own email address – you cannot register the same email address twice.

Please ensure you have permission to import records from other recorders, and make sure you are not duplicating records that they may add to iRecord themselves.

Acknowledgements

This booklet is based on the iRecord Training Manual Release 1.0, produced in April 2013 (irecord-training_Herts.pdf). I have changed and updated it as iRecord has changed significantly since then and have added more information where I thought it might be useful. It isn't a Training Manual as such, more a source of information, but I hope it contains enough to help anyone begin to harness the full range of possibilities presented by iRecord.

My knowledge of iRecord was helped considerably by attending a training day with Martin Harvey of the CEH Biological Records Centre.

Martin has also provided thorough feedback on my earlier draft and I have incorporated most of his comments and suggestions into Version 3.0.

Martin also provided me with the section on importing data from spreadsheets.

Screen-shots were captured and added using Microsoft's Snipping tool.

iRecord will (I am sure) continue to develop and I will try to update this manual if possible.

A quick note on other online recording and analysis systems.

iSpot – this is primarily an identification site where users can post photographs for identification.

iNaturalist – This is an international biological recording site. Judging by the maps, it is particularly popular in the USA. It offers about the only easy option if you wish to record observations outside the UK from travels or holidays. It has a record verification framework consisting of 'Casual', 'Needing ID' or Research Grade and is in many ways similar to iRecord in its aims. At present there is no sharing of data between iNaturalist and iRecord, so you are probably best sticking with one or the other. I prefer iRecord as it is currently the best way to feed data into the National Biodiversity Network (NBN) and National Recording Schemes. However, at some point in the future it is essential that the two work together, I think. However, challenges include a different Verification system and different species dictionaries so it won't be easy!

(Note as of April 2019 – provision is being made for transfer of "research grade" data (see iNaturalist site for explanation of their verification system) being entered into iRecord as part of the City Nature Challenge project 2019 to allow records from that project to be captured. However, there is no 2-way linking, so any records subsequently changed as a result of verification can not be reimported to iNaturalist!)

Pantheon – Not an online recording system, but an analysis system for lists of invertebrates. You can upload species lists and get reports from them, based on scarcity, habitat preferences and other criteria. It is being added to and improved all the time. Lists of species are all very well, but this software will help to evaluate them. I use it as a quick way to add value to species lists I send to site/conservation managers.

IF YOU HAVE ANY FEEDBACK OR COMMENTS ON THIS DOCUMENT, PLEASE EMAIL ME AND I WILL UPDATE IT FOR FUTURE USERS.

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