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Thank you for agreeing to verify records using iRecord and helping to make high quality biological records available to support research and conservation. This is a guide (version 5, 22 June 2020) to verifying records on iRecord, using the new verification page that was developed in early 2020. If you have any additional questions please contact us on [iRecord@ceh.ac.uk](mailto:iRecord@ceh.ac.uk).

See also the [verifiers' resources page](#). For general guidance on using iRecord see the [user guide](#) by Steve Garland, and further information is available on the [Help pages](#). There is also a [verifiers' forum](#).

## 1. How to become a verifier






Verifiers on iRecord are set up by agreement with relevant national recording schemes and societies (including county recorders for those schemes/societies), or for particular recording projects. Contact us on [iRecord@ceh.ac.uk](mailto:iRecord@ceh.ac.uk) to let us know which species groups and which geographic area you would like to cover, and which recording scheme or project you are associated with. We will liaise with relevant [National Recording Schemes](#) and survey coordinators to establish this role.

Once you have been set up as a verifier you will see the additional 'Verify' menu at the top of the iRecord pages. You will need to be logged in to carry out any of the activities described below.

## 2. What verifiers are asked to do

iRecord provides access to wildlife records submitted by a wide range of people. The records may have been added directly to iRecord, or may come via other websites and apps that share data with iRecord for verification purposes.

Verifiers are asked to assess which records are acceptable for their recording scheme, and give each one an appropriate status, using a set of terms that show whether a record has been accepted or not, and on what basis that decision has been made.

Verification status 1	Verification status 2
Accepted	Correct 
	Considered correct 
Not accepted	Unable to verify 
	Incorrect 
Unconfirmed	Plausible 
	Not reviewed

Explanation of terms for verification status 1:

Verification status 1	Explanation
Accepted	The record is accepted as meeting the standard required for inclusion by the recording scheme or project in question
Not accepted	The record is NOT accepted as meeting the standard required for inclusion
Unconfirmed	The record is in the system but has either not been looked at, or a verification decision not yet been reached

## Explanation of terms for verification status 2:

Verification status 2	Explanation
Correct	The verifier is able to confirm that the species has been identified correctly, usually on the basis of photo/s within iRecord (or specimen/s outside iRecord)
Considered correct	The verifier has not seen photo/s or specimen/s but is confident that the record is likely to be correct, based on difficulty of ID, date, location plus recorder skills/experience etc.
Unable to verify	The verifier is confident that the record is NOT likely to be correct, based on difficulty of ID, date, location plus recorder skills/experience (and where no photo/s or specimen/s are available); or photos are available but do not show enough detail to confirm the identification; and/or the record is not sufficiently well documented to confirm (e.g. location is vague)
Incorrect	The verifier is able to confirm that the species has <b>not</b> been identified correctly, or the record is erroneous in other respects, on the basis of photo/s or specimen/s, or on information from the recorder
Plausible	The record is plausible based on species, date and location, but there is not enough supporting evidence for the possibility of misidentification to be ruled out. This is not considered as an Accepted record (and would not be exported to the NBN Atlas for those schemes that link directly to NBN). This can be a good option for ensuring that unconfirmed records from inexperienced recorders can be dealt with without putting the recorder off by giving an outright rejection. Some recording schemes or projects find this category is useful to filter records in or out for analysis purposes, but it is up to your scheme whether or not to use this term.
Not reviewed	The record is in the system but has either not been looked at, or a verification decision not yet been reached

It is possible to use only the status 1 terms, giving a simple choice between Accepted or Not accepted. (See [section 7.1](#) below for how to set your verification page to display the status 1 or status 2 terms.)

When viewing individual records in the verification grid, decisions can be applied via the verification status buttons that appear above the record details pane:

Actions:      

When using one of the multiple record verification options (see [section 9](#) below) the buttons move to the top of the verification grid.

.../continued

### 3. Main elements of the verification page

In the main menu bar on iRecord, click on “Verify”. You will see a page that displays the records for verification and provides various tools for carrying this out.

The screenshot shows the iRecord verification interface. Callouts identify the following elements:

- Verification grid:** The main table of records for verification.
- Top-level filters:** Search bar, Context dropdown, Status dropdown, and Photos dropdown.
- Extra filter options:** Filter dropdown, Filter button, and Create a filter button.
- Map pane:** A map showing the geographical distribution of records.
- Record details pane:** A sidebar showing detailed information for a selected record.
- Verification controls:** Buttons for actions like 'Accept', 'Reject', and 'Create a filter'.

Media	ID	Species	Common name	Location	Date	Recorder	Determiner	Check s	Day of year	Month	Life stage
	1312851 3		<i>Bombylius major</i>	Bee Fly	London N11 3HT	31/03/2020	Penny Markton	Penny	91	3	adult
	1312844 2		<i>Bombylius major</i>	Bee Fly	Penparcau Hub Bee Garden	31/03/2020			91	3	
	1312843 5		<i>Bombylius minor</i>	Heath Bee-fly	Hove	01/04/2020			92	4	not recorded
	1312795 2		<i>Bombylius discolor</i>	Dotted Bee-fly	Newhaven: Falkholme Road	31/03/2020			91	3	adult
	1312790 8		<i>Bombylius major</i>	Bee Fly	Titchmarsh LNR	31/03/2020			91	3	not recorded
	1312784 8		<i>Bombylius major</i>	Bee Fly	Thrapston Lakes	31/03/2020			91	3	adult
	1312781 9		<i>Bombylius major</i>	Bee Fly	Titchmarsh LNR	31/03/2020			91	3	adult
	1312777 6		<i>Bombylius major</i>	Bee Fly	Adjacent to river, along path, Okehampton	31/03/2020			91	3	adult
	1312769 7		<i>Bombylius major</i>	Bee Fly	SG18 ODF	31/03/2020			91	3	adult

By default the grid displays only those records that have not yet been verified. You can use the filter settings to change this if you want to see the records that have already been verified.

If you have more than one verification role within iRecord, you will be able to choose the appropriate set of records from the Context dropdown:

Context: Bee-fly Watch; Harvey, Martin C.

Moths; Berkshire; Harvey, Martin

Soldierflies; Harvey, Martin

### 4. The verification grid

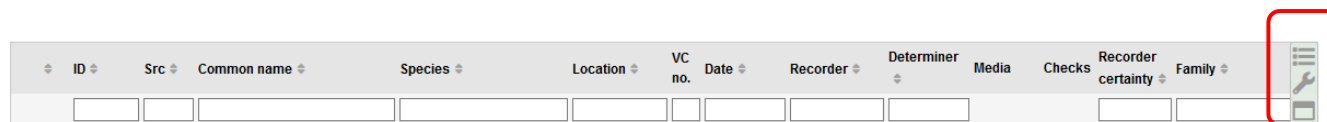
#### 4.1 Sorting the grid

By default the grid is sorted by record ID number, with the most recently added records at the top, but you can change the sorting by clicking on the small up/down arrows next to any of the column headings:

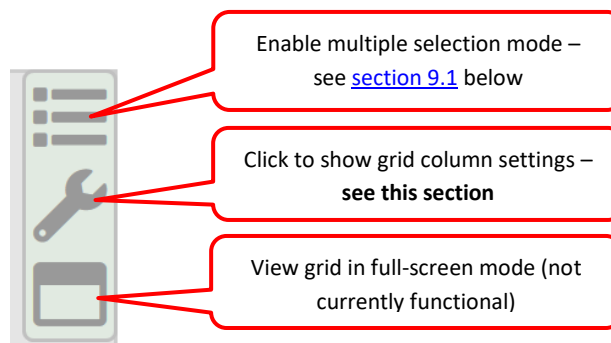
ID	Src	Common name	Species	Location
1438307 4	721271	Bee Fly	<i>Bombylius major</i>	SN0311 Whittow 1km sq

## 4.2 Controlling which columns appear in the grid

At the top-right of the grid are three control buttons:



These three buttons are:



The first button to enable multiple selection mode comes into play for verifying multiple records – see [section 9](#) below. The third button is not yet fully functional and can be ignored for now. This section concentrates on the second button – the spanner icon.

If you click on the spanner icon a list opens up. This is a long list of all the possible columns that could be displayed in the grid, with tick-boxes to select the columns you want. If you ticked **all** these columns you would end up with an impossibly congested grid! We recommend you scroll down the list and choose the set of columns that you find most helpful for display in the grid. Don't forget that much of the information available in the columns is also available in the record details page to the right of the grid, so it's best to only choose those columns in the grid that provide the main items that you need to verify, sort or filter the records.

You can also rearrange the order in which the columns appear. Click and drag any one of the listed columns, and you can move it to wherever you wish it to be in the sequence.







Once you have made your choices, click Save, or Cancel if you don't wish to save, or Reset if you want to go back to the default view. If you do save a new set of columns the grid will reformat itself to the new set, and this set should reappear next time you visit the page.

## 4.3 Column headings

Most of the column headings should be self-explanatory, but here are some of the less obvious ones.

- **ID:** every record in the iRecord system has a unique ID number. You can use this number to sort the records (the higher the number the more recently the record was added), or to search for a particular record if you know its number.
- **Src:** abbreviation for "Source". The numbers that are displayed in this column tell you which website/app/recording form was used to enter the record – hover over the numbers and you will see what the source is. The numbers have two parts: the number on the left of the bar is the website that the record originated from, and the number on the right of the bar is the survey within that website. Records added directly to iRecord will have the number "23" on the left. As another example, records from the SEWBRReCord website ("South-east Wales Biodiversity Records Centre") have the number "41" on the left.
- **Checks:** these are the automatic checks that iRecord carries out for some species groups. Checks may be made on whether the species is considered hard to identify; whether it has been recorded within its known range; and whether it has been recorded within its usual flight/activity period. For more

information on how the rules were derived see our [auto-checks Help page](#). In this column you will see the following symbols.

Symbol	Meaning
	Passes all rule checks; <b>OR</b> No rule checks available for this species
	Fails at least one rule, in which one or more of the three following reasons will be displayed:
	Fails on identification difficulty (hover over icon to see details)
	Fails due to being outside the known range
	Fails due to being outside the flight/activity period
	Records from this source do not have rule checks applied

#### 4.4 Grid controls for number of records

The number of records in the current grid is shown at the bottom of the grid:



If there is a large number of records, you may wish to apply filters to prioritise which ones to verify in the time you have available – see [section 8](#) below for more on filtering.

Also at the bottom of the grid is a control for how many records you wish to display in the grid:



#### 4.5 Photo thumbnails

If you have included the “Media” column in your verification grid you will see a thumbnail image for each photo that is attached to the records. If you click on the thumbnail image it will open up to a larger size, and if there is more than one photo for the record you will see arrow buttons on either side of the photo so you can scroll through to the next in the sequence, or if you prefer you can use the left or right arrow keys on your keyboard. To close the image you can either click on the close button at the top-right of the photo, or use the Escape key on your keyboard.

To see photos at the maximum available size use a right-click on the thumbnail image, instead of the normal left-click. From the right-click options, select ‘open link in new tab’ (or similar wording depending on your web browser). Note that this ‘maximum’ size photo is up to 1500 pixels square, and the recorder’s original photo may be larger again – contact the recorder if you need to see the photo at its full original resolution.

## 5. Record details pane

If you click once on any record in the grid, the details for that record will be displayed in the record details pane on the right of the grid.

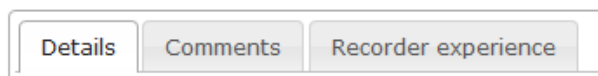
### 5.1 Details tab

At the top of the details pane you will see the standard biological record information: what, where, when, who. Below this there will be additional information – exactly what this consists of will depend on the source of the record, and is displayed under subheadings for:

- Additional occurrence attributes (data applying to this particular record occurrence)
- Additional sample attributes (data applying to the sample that contains the occurrence)
- Recorder attributes (usually including the recorder's email address)
- Derived info: the higher taxonomy (Class :: Order :: Family) and the LERC boundary that the records falls within

You can use the email address to contact an individual recorder, but see [section 7.2](#) below for how to query a record. Important: **you should not make a copy of the email address and add it to any mailing lists**, as that contravenes iRecord's terms of use.

As well as the record details, there are tabs for "Comments" and "Recorder experience":



### 5.2 Comments tab

Comments can be added to the record via several routes. If the record has triggered any of the rule checks you will see comments showing that. If the recorder, or any other iRecord user, has added a comment to the record following submission it will appear here. And if you as a verifier add a comment it will also appear here, e.g. if you add a comment with your verification decision, or when querying a record, or with a redetermination.

The comments are displayed in date order, with the most recent at the top, providing a trail for any discussion over the record.

### 5.3 Recorder experience tab

This provides two tables. The first shows how many records the current recorder has submitted of the current species, and whether they have previously been accepted or not. The second table shows how many records the current recorder has submitted of the current species group (at Order level), and whether they have previously been accepted or not. This provides an indication of the level of experience the recorder has (but of course it is only based on the records they have added to iRecord, and has no knowledge of their experience outside iRecord!).

Details

Comments

Recorder experience

Experience for *Microchrysa polita*

Total records: 32

Year	Verified	Other	Rejected
2020	0	1	0
2019	2	0	0
2018	0	0	0
Total	7	1	

Experience for insect - true fly (Diptera)

Total records: 4857

Year	Verified	Other	Rejected
2020	158	79	0
2019	438	264	0
2018	311	136	1
Total	1740	923	7

You can click on the blue numbers to see the records they refer to

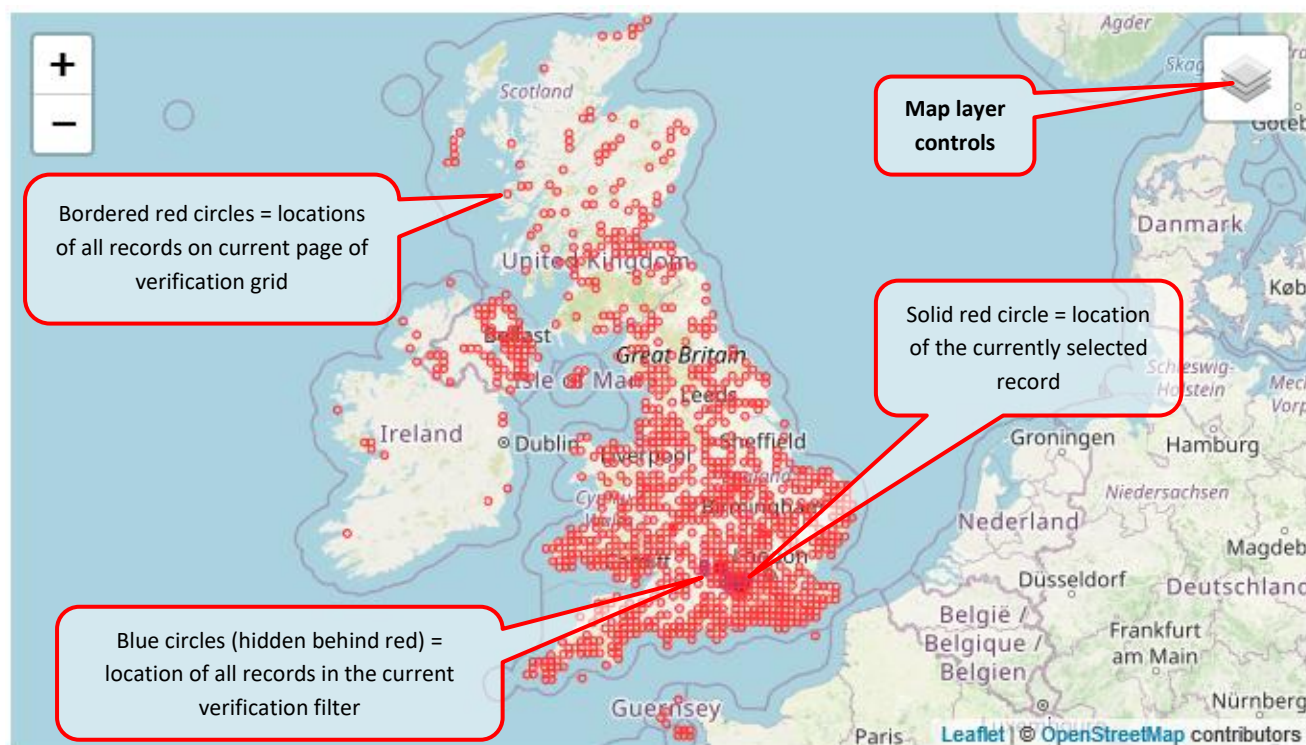
You can click on the blue numbers to see the records they refer to



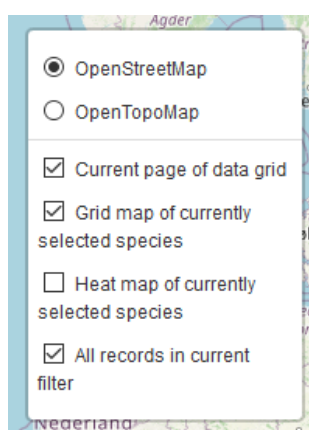
The blue numbers for each of the categories are links – if you click on any one of the numbers a new page will open up showing the record details that make up the total number of accepted or rejected records etc.

## 6. Map pane

The map is provided to give some context to the record and allow you to check whether the location seems to be correctly recorded. There are some map settings that allow you control the layers that appear on the map; the default view shows:







If you put your mouse over the “Map layer controls” box it will open up and show you some tick-box options:





The four options for the symbols that get plotted onto the map are:

Current page of data grid – solid red dots for just those records that are visible on the current page of the verification grid	
Grid map of currently selected species – larger red dots, shaded to indicate numbers of records for each dot, showing all records held in iRecord for the species currently selected in the grid	
Heat map of currently selected species – shows the same data as the previous option, but as a shaded heat map rather than as discrete dots	
All records in current filter – blue circles showing all records in the current verification grid, regardless of which page they are on	

As always it is worth trying out these options to see what works best for you. (The one that I use most frequently is “Grid map of currently selected species”, which allows me to quickly see whether the record I am dealing with falls within the known range of the species.)

## 7. Using the control buttons to verify, edit and redetermine individual records











(It's also possible to add a verification status to multiple records at once – see [section 9](#) below.)

### 7.1 Verification status buttons

Verification decisions are applied using the five control buttons that appear above the record details pane:



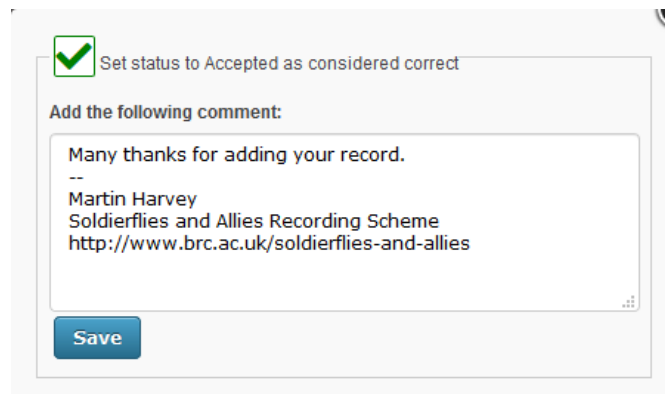
*The initial 'switch' button, to the left of the verification controls, can be used to switch to the three 'status 1' verification terms, instead of the five 'status 2' terms – we recommend that you use the five 'status 2' terms if possible.*

<b>Recommended:</b> all status 2 terms:						
<b>Alternative:</b> just the status 1 terms:						

See [section 2](#) above for an explanation of the different status 1 and status 2 terms.

When you click on one of the verification status buttons, a window opens up to allow you to add a comment. You don't have to add a comment every time, but it can help to explain why a record has not been accepted, or to highlight a particularly interesting record, or to thank the recorder for adding their record. (See

[section 5.2](#) below for more on iRecord comments.) Some verifiers choose to add some standard text into this box to make it clear which recording scheme they are associated with, e.g.:

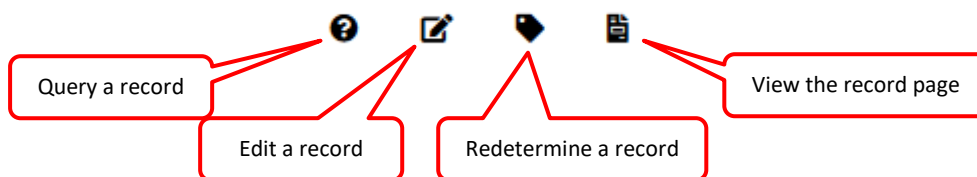


A screenshot of the iRecord interface showing a comment box. At the top, there is a green checkmark icon and the text "Set status to Accepted as considered correct". Below this, it says "Add the following comment:". The comment box contains the following text: "Many thanks for adding your record.", "--", "Martin Harvey", "Soldierflies and Allies Recording Scheme", and "http://www.brc.ac.uk/soldierflies-and-allies". At the bottom of the comment box is a blue "Save" button.

If you do not add a comment, the recorder will simply receive a notification to say that the record has been accepted or not.

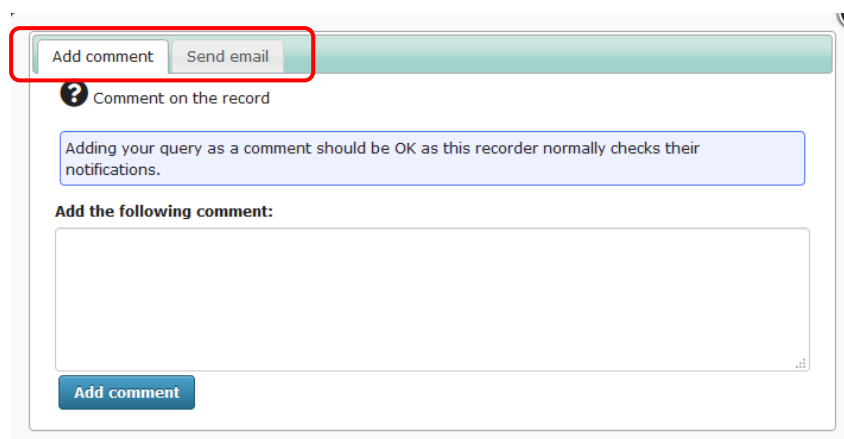
Assuming that you have left the verification grid in its default view, where it only displays records that are pending verification, then once you save your verification decision the record will be removed from the grid. To see records that you have already verified you can adjust the filters, see [section 8](#) below.

There are some more action buttons to the right of the verification status buttons:



## 7.2 Querying records

When you click the Query button a window will open that allows you to either add a comment to the record itself, or to send an email to the recorder. iRecord will tell you if the recorder is someone who is known to access their notifications, or whether it is better to send an email, but you can choose either option.



A screenshot of the iRecord query window. At the top, there are two tabs: "Add comment" and "Send email". Below the tabs, there is a question mark icon and the text "Comment on the record". A blue box contains the text: "Adding your query as a comment should be OK as this recorder normally checks their notifications." Below this, it says "Add the following comment:". There is a large text area for the comment. At the bottom of the text area is a blue "Add comment" button.

There are pros and cons to both approaches:

- **Add comment**

Any comment that you add here will get appended to the comments tab in the record details pane (see [section 5.2](#)). The original recorder will be alerted that a comment has been added, and hopefully they will respond by adding a further comment in response to yours. These comments are viewable by anyone looking at the record on iRecord, so are 'public', which calls for a certain amount of diplomacy if querying

identifications! And personal details such as addresses or phone numbers should never be included in comments.

An advantage of using this option is that your comments are stored with the record, so that if you revisit the record after some time you can easily see what it was that you queried.

- **Send email**

This will provide you with a template email to send to the recorder, to which you can add any text that you wish. When this is saved it gets sent to the recorder's registered email address, and if they reply it will come back to your own registered email address. All that gets stored in iRecord itself is a comment that says "I emailed the recorder to ask for details".

An advantage of using this option is that some people are more likely to respond to an email than to a comment, and you can then continue the conversation if needed via email in private, without clogging up the record with a whole series of comments.

Whichever option you use, the record will be flagged in iRecord as having been queried, and will be removed from the default "Pending" set of records in the verification grid. You can find previously queried records by setting the Status filter to "Queried" (see [section 8](#) below).

Once Queried, a record will remain flagged as Queried until it is answered or until the verifier changes the verification status of the record.

### 7.3 Editing records

This needs careful thought before use, and we advise that record editing is seen as a last resort if problems cannot be resolved by querying or redetermining the record.

If you do need to use the Edit button it is best to right-click and "open link in new tab" – if you use a normal left-click you will lose your place in the verification grid.

In most cases this button allows you to edit the full details of original record (but note that some record sources do not allow editing within iRecord). In many cases it will be better to ask the original recorder to do any editing that is required, but as a last resort it is possible for the verifier to edit the record, e.g. if the recorder does not respond to emails, or was not logged in to iRecord when they added the record (in which case they will not be able to edit it themselves).

Please use this option with caution, especially if the record you are editing may be part of a list of records, as any changes you make (e.g. to location names or grid refs) could change records from other species groups as well as yours.

### 7.4 Redetermining records

If the record has a photo and the recorder has misidentified it, you can redetermine the record to another species, or to a higher taxon (e.g. to genus or family level). This does not affect the verification status of unverified record; previously verified records will be reset to "Pending". If you redetermine to another species in your own taxonomic group the record will subsequently appear in your verification grid to be verified; if you redetermine it to a species that is outside your taxonomic group the record will be removed from your verification grid (and will appear in the grid for whoever is verifying the alternative species group on iRecord).

In the “Redetermine to” box you need to type in a taxon name and select it from the list that is offered, just as you would when entering a new record. You don’t have to add a comment, but if it is possible to provide an explanation to recorders that you are redetermining their record and let them know why that is usually greatly appreciated by the recorders.

When you click on “Apply redetermination” the record will be removed from your verification grid, and will reappear under the new taxon name after about 10–15 minutes (unless you have redetermined it into a different species group from the one you are verifying).

In many cases, your name will be now shown as the determiner of the redetermined record, but not all record sources enable this, and some will not show a determiner name after redetermination.

## 7.5 View the record page

Another button that works best if you right-click and “open link in new tab”. This button simply opens the record in its own page, and allows you to see it as originally entered. For a few record sources no view is available within iRecord and you will see an error message if the record cannot be viewed.

## 8. Filtering records in the grid

Familiarity with record filtering is an essential step towards verification of multiple records (see [section 9](#) below). There are several different ways of filtering records in the grid.

### 8.1 Top level ‘context’ filters

These provide some straightforward options for controlling the set of records that appear in the grid.

- **Search**

A general search box. You can type any text in here and any record that contain that text, in any part of the record, will be displayed. For example, if you search for the word “common” you may see records that have “common” as part of the location name, **and** records for species that include “common” in the English name, **and** records from recorders with “common” as part of their name, **and** records that have the word “common” as part of a comment attached to the record. So this is a very broad search, but can be useful if you need to find a particular record and can only remember some words associated with it. This test search is general not suitable for bulk verification filtering.

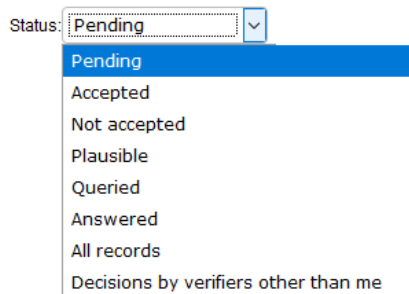
It is possible to specify more precise search terms using this search box. Some guidance on this is available in the iRecord Help pages: [“ElasticSearch: search box”](#).

- **Context**

This is only visible if you have more than one verification role in iRecord. If you have multiple roles, e.g. for different taxon groups or different counties, you will be able to choose between those roles here.

- **Status**

By default, the grid shows records that are pending verification. But you can use this Status dropdown to choose another option:



The final option, “Decisions by verifiers other than me”, may require some explanation. Even if you are the sole verifier for your taxon group and/or county, you may occasionally find that records within your remit have been verified by someone else. That person may be familiar to you, e.g. if your recording scheme has a team of verifiers, but sometimes you may encounter an unfamiliar verifier name. The most frequent explanation for this is that some targeted recording projects may have verifiers appointed to deal with just that project. For instance, if your role includes the county of Leicestershire you will see records from the [NatureSpot](#) website, an independent website that has its own team of verifiers but shares records with iRecord. A number of other targeted projects have their own verifiers. If you need to know more about other verifiers that overlap with your role please contact iRecord.

Remember that you can add a column to your grid to show the verifier’s name, see [section 4.2](#) above.

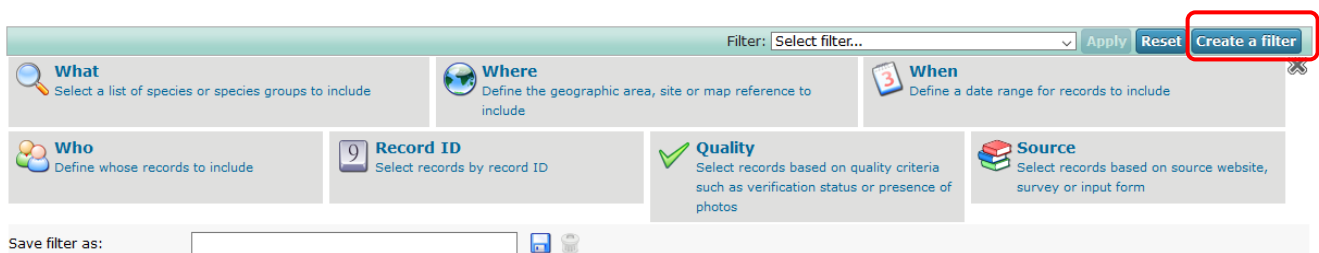
- **Photos**

A straightforward choice between displaying all records, or just those that have photos attached, or just those that do not have photos attached.

## 8.2 Create a filter

This option for filtering records works in much the same way as it did on the previous verification page, and on the current Explore pages. Click on the “Create a filter” button to access the available options.

You can build and save more complex filters by clicking on the ‘Create a filter’ button. This opens up a set of choices that you can make to group together particular sets of records. You can add settings to as many of the boxes as you wish to create a customised filter.



Most of these should be fairly self-explanatory, and see the [Help page on filtering and mapping records](#) for more information.

One thing to note is that the “Quality” filter here may conflict with the “Status” or “Photos” filters at the top of the page. For example, if your Status filter is set to “Pending” and you then set the Quality filter to “Accepted records only” you will see no records, as the two filters are in conflict.

To save your filter so that you can re-apply it later on, type a name for it in the ‘Save filter as’ box, and then click on the blue Save icon:

The screenshot shows the iRecord filter interface. At the top, there is a 'Filter: Select filter...' dropdown with 'Apply', 'Reset', and 'Create a filter' buttons. Below this are several filter categories: 'What' (Select a list of species or species groups to include), 'Where' (Define the geographic area, site or map reference to include), 'When' (Records recorded between 01/01/2020 and 31/12/2020), 'Who' (Define whose records to include), 'Record ID' (Select records by record ID), 'Quality' (Select records based on quality criteria such as verification status or presence of photos), and 'Source' (Select records based on source website, survey or input form). At the bottom, there is a 'Save filter as:' label followed by a text input box containing 'Records in 2020' and a blue save icon.

To reload a saved filter, select its name from the dropdown list in the ‘select filter’ field:

The screenshot shows the iRecord filter interface with the 'Filter: Select filter...' dropdown menu open. The dropdown list contains the following options: 'Select filter...', '2016 records', 'All soldierflies', 'Bombylius discolor accepted records', 'Bombylius major excluding not accepted', 'Check moth photos', and 'Check soldierfly photos'. The dropdown is highlighted with a red box.

### 8.3 Column-head filter boxes

You can filter the grid of records by typing one or more search criteria into the white boxes at the top of each grid column. To apply the filter, you then have to click to move away from the box you typed in to (or use the tab key to do this). This allows you to, for instance, select all the records for one particular recorder so that you can work through their data in one block, or all records for a species group, etc.:

ID	Src	Species	Common name	Location	Map ref.	VC no.	Date	Recorder	Determiner	Media	Checks	Last updated
130451	2319	<i>Endothenia gentianaeana</i>	Teasel Marble	Dry Sandford Pit	SU46759	963	22	14/03/20	Harvey, Martin C., and Botham, Marc S.			28/03/2020 16:39
130450	2319	<i>Orthosia incerta</i>	Clouded Drab	Dry Sandford Pit	SU46759	947	22	14/03/20	Harvey, Martin C.			21/03/2020 20:19
130450	2319	<i>Orthosia gothica</i>	Hebrew Character	Dry Sandford Pit	SU46759	947	22	14/03/20	Harvey, Martin C.			21/03/2020 20:19
130450	2319	<i>Orthosia cerasi</i>	Common Quaker	Dry Sandford Pit	SU46759	947	22	14/03/20	Harvey, Martin C.			21/03/2020 20:19

If you use the column-head filter for species names you can filter by the genus (to list all species in a single genus) or by the complete binomial name (to list just a single species).



Note that the column-head filters will search for any occurrence of a complete word, but will not search for part-words unless you add an asterisk wildcard:

Typed in to column-head filter	Result
Orthosia	finds records of all moths in genus <i>Orthosia</i>
Orthosia cerasi	finds records of all moths in species <i>Orthosia cerasi</i> (Common Quaker)
Orthosia cer	finds no records, because “cer” is an incomplete name
Orthosia cer*	Uses the wildcard * to find records of all moths in species <i>Orthosia cerasi</i>

## 9. Verifying multiple records ('bulk verification')

You can assign a single verification decision to multiple records, and this can of course be very useful when dealing with large numbers of incoming records. However, this does need approaching with care, as it is possible to apply a decision to more records than you intended, and once applied there is no 'undo' option.

The key to verifying multiple records is to ensure that you have correctly filtered the records to the set of records that you want to process in one go. This might be all the records for a particular recorder, or all the records for a particular species, or for recorder + species combined, etc.

You can also add a query comment to multiple records. At the moment it is not possible to redetermine multiple records.

There are two ways in which you can set a verification status for a whole set of records at once. One is a relatively manual selection of records using a tick box system; the other is a relatively automatic selection of records based on the filters currently in use.

### 9.1 Using tick boxes to verify multiple records

First of all, go to the control buttons at the top-right of the grid and click on the top button to “Enable multiple selection mode:



If you click the same control button again it will turn off the multiple selection mode – it just toggles from one mode to the other.

.../continued

When in multiple selection mode you will see two changes to your grid: a set of tick boxes will appear on the left-hand side of the grid, and you will also see that the verification status buttons have moved to a position above the grid (rather than being above the record details pane).

Verification status buttons move above grid

Tick this box to put a tick against all records on the current page

Tick boxes for individual records to select those records

Blue highlight on “selected” means that if you click one of the verification status buttons, that status will be applied to **all selected** (= ticked) records

You can also add a query to multiple records

	ID	Src	Species	Common name	Location
<input type="checkbox"/>	14377636	23 42	<i>Microchrysa polita</i>	Black-horned Gem	Great Kimble
<input type="checkbox"/>	14193153	23 42	<i>Machimus atricapillus</i>	Kite-tailed Robberfly	Grangeland
<input type="checkbox"/>	14082934	23 42	<i>Rhagio tringarius</i>	Marsh Snipefly	Cuttle Brook

Use the tick box at the top to select all the records visible on the current page of the grid, or tick individual records to build up a set of records. You can then apply a single verification status to all the ticked records in one go. When you click on a verification status button, a comment box opens up in the same way as for single records:

Click here to save and **verify all** ticked records

Click here to cancel and exit **without** verifying any records

Set status to Accepted as considered correct for 29 records

You are updating multiple records!

Add the following comment:

Save

Note that there is a message at the top of this comment box to warn you that your decision is being applied to multiple records, and it tells you how many records will be included. You can add a comment, but if you do the same comment will be added to all the set of ticked records.

Once you click Save the verification status will be applied to all the ticked records, and there is no undo option! If you are unsure that the right number of records has been selected, it is best to exit by clicking the cross at the top-right of this box.

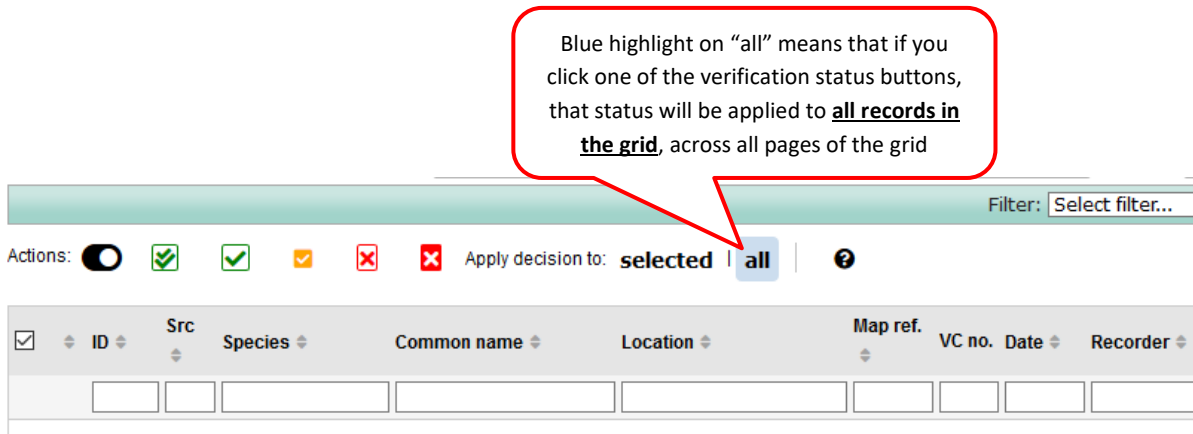
The tick boxes provide a simple way of dealing with multiple records on one grid page (and remember that you can change the number of records showing in the grid, see [section 4.4](#) above). One approach that I frequently take is to use the tick box at the top of the grid to tick all records, and then work my way down the page, unticking any records that are incorrect or need further investigation. I can then accept all the records

that remain ticked, which get removed from the page, and I can then deal with the records that need further attention on an individual basis.

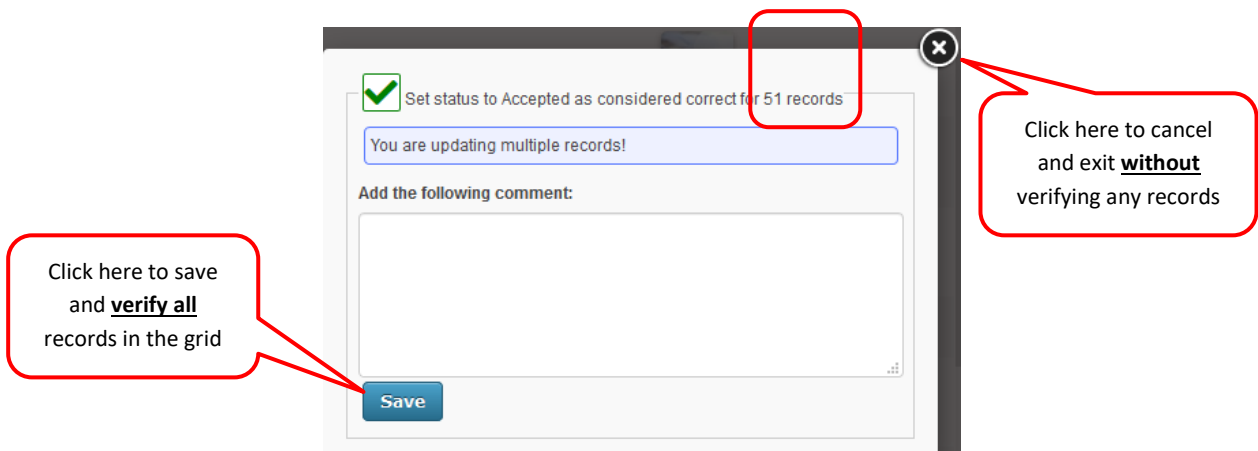
## 9.2 Verify all records in the grid

Take care! This tool allows you to add a verification status to all the records in the current grid, across all pages of the grid. You need to be confident that you have applied the filters that you want, and that you are happy for all the records to receive the same status.

To apply this, you need to click on the “all” setting at the top of the grid (when in multiple record mode):



If you now click on one of the verification status buttons, it will again open up a comment box that tells you how many records you will be verifying at once:



In the above example we would be verifying 51 records, but it will just as easily verify 51,000 records, so please use with care!

### 9.3 Summary of grid and multiple record controls

A larger version of this graphic is [available here](#).

The screenshot shows the 'Verification (new version)' interface. Callouts provide the following instructions:

- Click here to tick all 30 records on the page (points to the 'all' button in the 'Apply decision to' dropdown).
- Click one of the verification buttons to accept (or reject) all records currently ticked (points to the green checkmark button).
- ONLY click 'all' IF you want to accept ALL the pending records (including all pages of the grid) without further inspection! (points to the 'all' button).
- Type name here to filter by recorder (after typing click out of the box to apply the filter) (points to the 'Recorder' filter box).
- Click here to add further filter options if needed (points to the 'Filter' dropdown menu).
- Click here to add or remove the tick-box option (points to the 'Filter' dropdown menu).
- Click 'spanner' to select which columns appear in the grid (points to the 'spanner' icon in the top right of the grid).
- Click small triangles here to sort records by species name (points to the small triangles in the 'Species' column header).

ID	Src	Species	Common name	Location	Map ref.	VC no.	Date	Recorder	Determiner	Media	Checks	Day of year	Month	Life stage
12641890	23190	Acentria ephemerella	Water Veneer	Lydalls Road	SU5235903	6	22 13/08/2016	Botham, Marc	Botham, Marc		226	8	adult	
12641628	23190	Acrionicta psi	Grass-veneer	Lydalls Road	SU5235903	6	22 05/08/2016	Botham, Marc	Botham, Marc		218	8	adult	
12641998	23190	Agriphila geniculata	Elbow-stripe Grass-veneer	Lydalls Road	SU5235903	6	22 21/08/2016	Botham, Marc	Botham, Marc		234	8	adult	
12641978	23190	Agriphila geniculata	Elbow-stripe Grass-veneer	Lydalls Road	SU5235903	6	22 20/08/2016	Botham, Marc	Botham, Marc		233	8	adult	
12641921	23190	Agriphila geniculata	Elbow-stripe Grass-veneer	Lydalls Road	SU5235903	6	22 18/08/2016	Botham, Marc	Botham, Marc		231	8	adult	
12641944	23190	Agriphila geniculata	Elbow-stripe Grass-veneer	Lydalls Road	SU5235903	6	22 19/08/2016	Botham, Marc	Botham, Marc		232	8	adult	
12641885	23190	Agriphila geniculata	Elbow-stripe Grass-veneer	Lydalls Road	SU5235903	6	22 13/08/2016	Botham, Marc	Botham, Marc		226	8	adult	
12642029	23190	Agriphila geniculata	Elbow-stripe Grass-veneer	Lydalls Road	SU5235903	6	22 22/08/2016	Botham, Marc	Botham, Marc		235	8	adult	
12642037	23190	Agriphila straminea	Straw Grass-veneer	Lydalls Road	SU5235903	6	22 22/08/2016	Botham, Marc	Botham, Marc		235	8	adult	
12641640	23190	Agriphila straminea	Straw Grass-veneer	Lydalls Road	SU5235903	6	22 06/08/2016	Botham, Marc	Botham, Marc		219	8	adult	

## 10. Establishing a routine

The various options for filtering and for verifying multiple records offer many ways in which verification can be organised. It's worth spending some time thinking about what works best for your purposes. If your scheme receives records at a relatively slow pace you may well be able to verify each one individually as they arrive. But schemes that have larger amounts of data arriving may need a different approach.

Here are a couple of approaches that I have found useful to work through records as quickly as possible (but every recording scheme is likely to have slightly different approaches to this).

### 10.1 Example workflow for records with photos

1. Set the "Photos" filter at the top of the page to "With".
2. At the top of the Species column, click on the column-head arrows to sort the records in the grid by species name.
3. Work through the records individually, clicking on the thumbnail image to check that it is correctly identified, and using the Escape key to close the image; if an image needs a closer look, right-click on the thumbnail to open up a large image in a new tab.
4. Assign a verification status to each record individually as you work through them.
5. Or alternatively, use the tick box at the top of the grid to tick the whole page of records first, and then untick any that turn out to be incorrectly identified, so that when you reach the foot of the page only the correct records will still be ticked. You can then apply a verification status to accept all the ticked records. The accepted records will be removed from the grid, and the ones that you did not tick will now be at the top of the grid, where you can deal with any redeterminations, queries or rejections individually.

### 10.2 Example workflow for records without photos

1. Set the "Photos" filter at the top of the page to "Without".
2. At the top of the Recorder column, click on the column-head arrows to sort the records in the grid by recorder name. If you have many records per recorder you may also wish to use the column-head filter box to select records from one recorder at a time.
3. In multiple selection mode, use the tick box at the top of the grid to tick all records on the page.

4. Scroll down the grid, checking the records, and unticking any that need to be queried or rejected.
5. When you reach the foot of the page only the correct records will still be ticked. You can then apply a verification status to accept all the ticked records. The accepted records will be removed from the grid, and the ones that you did not tick will now be at the top of the grid, where you deal with any queries or rejections individually.

An alternative to the above approach would be to go through all the records for a particular recorder and reject or query any records that can't be accepted. The records remaining in the grid for that recorder could then be accepted in one go, either by use of the tick boxes, or by using the "all" option to verify every record in the filtered grid.

## 11. Downloading records

As a verifier you are able to download the record details for all the records that you are able to verify. Currently this is done by going to the Explore menu and choosing Download. Then, in the "Download type", select your verification role:

We are in the process of developing an improved download page that will be quicker to respond and that will no longer have a limit of 20,000 records per download. Guidance on this will be issued separately.

iRecord is operated by the [Biological Records Centre](#) (BRC) as part of the work of the [UK Centre for Ecology & Hydrology](#) (UKCEH). BRC, established in 1964, is a national focus in the UK for terrestrial and freshwater species recording. BRC works closely with the voluntary recording community, principally through support of National Recording Schemes and Societies (as [listed](#) on the BRC website). BRC receives support from the [Joint Nature Conservation Committee](#) via the Biological Recording, Verification and Interpretation (BReVI) project and through support by the [Natural Environment Research Council](#) award number NE/R016429/1 as part of the [CEH UK-SCAPE programme](#) delivering National Capability.

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Discussions with a number of [National Recording Schemes](#), [Local Environmental Records Centres](#), expert verifiers and recorders have greatly helped shape the development of this site.

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