Importing records to iRecord from a spreadsheet

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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.

Before you start:
If you need to import large amounts of data (10,000 records or more) please contact us 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	
1	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: Download Template

Alternatively, click   Import Records   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:
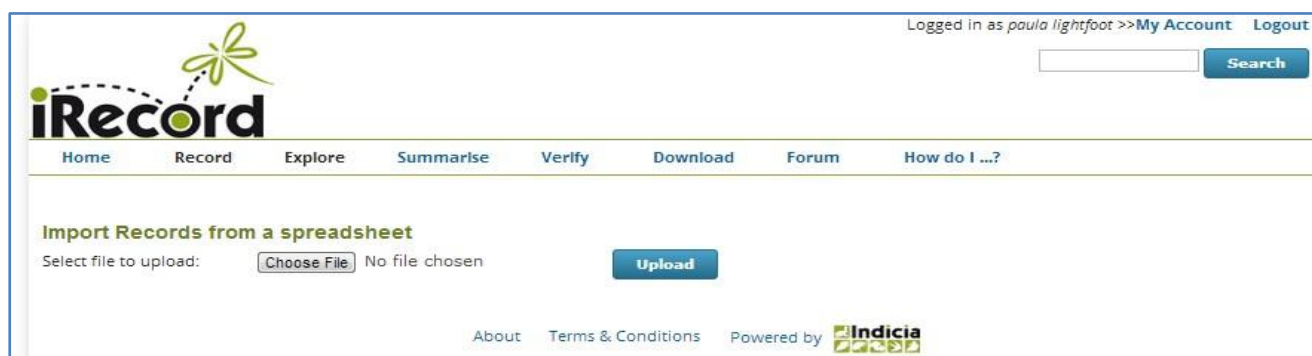
On the next page you need to specify which "Survey" you want to import your records into, by selecting from the dropdown list. In most cases you should choose "iRecord Import" unless you have a specific need to use a different Survey. (For example, some recording schemes have a custom recording format 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":

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

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 record a 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 species 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 "Sample method" and "Method (free text)" below) – has to match predefined terms, 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
MV 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

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
MV Light
Actinic Light
Daytime observation
Dusking
Attracted to a lighted window
Sugaring
Wine Roping
Beating tray
Pheromone trap
Other method (add comment)

Sex

Term
not recorded
male
female
mixed

Stage

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.