iRecord guidance: templates for record comments
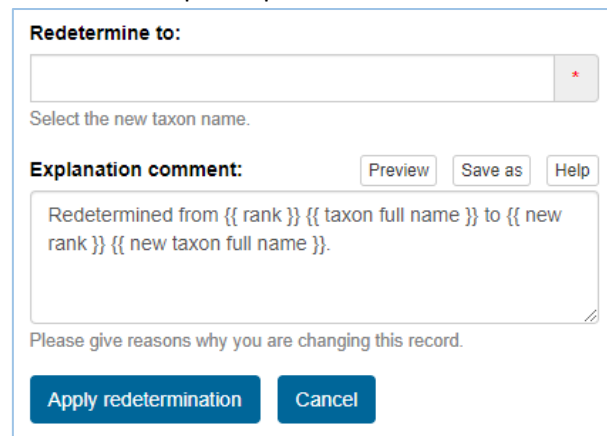
This feature added in April 2023 allows verifiers to save one or many templates containing text, e.g. to provide a 'signature' that contains the verifier name and a link to their recording scheme; or a frequently used comment about a species, etc. Once saved the templates can be re-used whenever needed.

You don't have to use the templates at all! You can just add your comment in the usual way. The templates provide extra options for quickly calling up comment text that you have previously saved.

Use 1: redetermation comments

A standard template is in place for comments associated with redeterminations. When you click on the redetermination button the window that opens up contains some standard text:

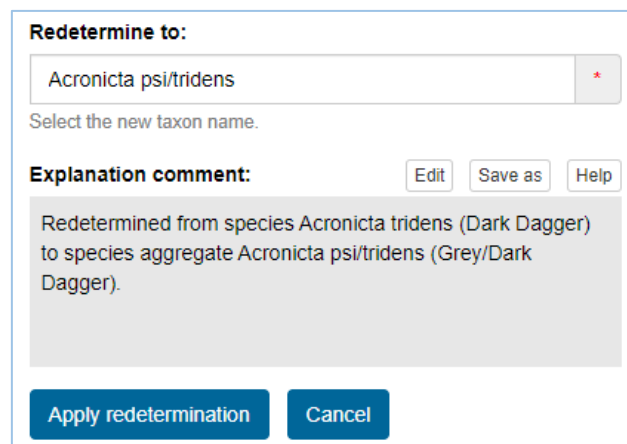When you choose a new species in the box to "Redetermine to", and then apply the redetermination, the standard text will automatically fill in with the details of the taxon that was originally entered, plus the details of the taxon that you are redetermining it to. For example, a moth recorder might record Grey Dagger moth, but you need to redetermine it to the aggregate Grey/Dark Dagger. To see what the template will create, click on the "Preview" button:

If you want to change the text from the Preview, click on "Edit". You can add extra text alongside the standard text, or if needed you can delete the standard text and replace it with the text you wish to use. Once you click on "Apply redetermination" the record will be saved with its new identification, and the recorder will receive a notification of the comment (depending on their notification settings).
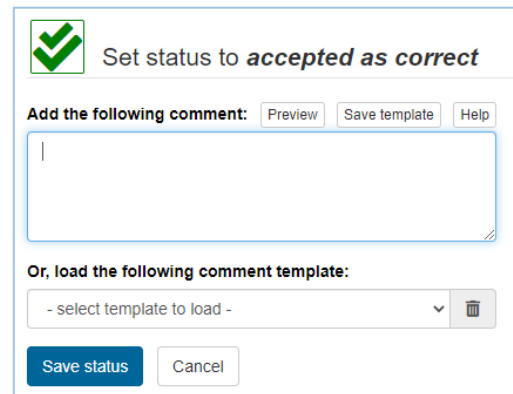
As you can see in the above example, the template text uses 'placeholders' in double curly brackets. The placeholders get replaced by the appropriate text for the record currently in use, so that in this example:

- {{ rank }} gets replaced with "species" (because the original record had a species name)
- {{ taxon full name }} gets replaced with "Acronicta tridens (Dark Dagger)"
- {{ new rank }} gets replaced with "species aggregate" (because the record is being redetermined to the agg.)
- {{ new taxon full name }} gets replaced with "Acronicta psi/tridens (Grey/Dark Dagger)"
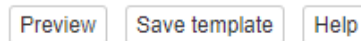
Use 2: verification comments

This provides more general options for you to save and recall any number of text templates. When you apply a verification decision, the comment box opens up in the normal way, but you will see that it has a number of additional features.

One option is to "select template to load". Initially there will not be any templates to choose from in this list – you have to create and save at least one template first.
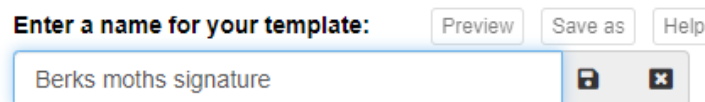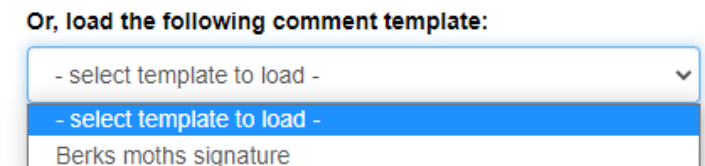

Creating a simple text template

Enter your comment text in the box as normal, then click the "Save template" button above the text box:

Another box will open up to allow you to give your template a name and save it:

Having saved your text under this name, you will be able to use it again whenever you wish, by finding "Berks moths template" in the "select template to load" box:

This is suitable for standard signature-type text, such as:

```
Many thanks for adding your record to iRecord.
---
Martin Harvey
Berkshire County Moth Recorder
https://sites.google.com/site/berksmoths/
```

Note that templates saved when **accepting** records will only be available to select when accepting other records. In the same way, comments for rejections and redeterminations each have their own set of templates.

Creating a templates using placeholders

You can insert placeholders into the text which will be replaced by details about the current record, making your templates more flexible. Use the Preview button to check the behaviour of your template placeholders before saving the comment. Having gone in to the preview option, you can return to your text and edit it further if needed by clicking on the Edit button. The available placeholders can be see below, or by clicking on the "Help" button above the text box.

An example template might look like the following:

```
Thanks for your record of {{ taxon full name }} which has been
{{ action }}.
```

Upon saving your verification decision, the above template will get filled in according to the details for the record you are commeting on, e.g. for a record of Peacock butterfly this would be:

```
Thanks for your record of Aglais io (Peacock) which has been
accepted as correct.
```

Once you have set up a template that you want to be able to use again in future, save it in the same way as described above. It will then appear in the "select template to load" box next time you add a verification comment.

The full list of placeholders you can use is shown below, and is listed within the Help section of the comment box (where a copy button ⧉ allows you to copy theplaceholder you want and add it to your template).

Placeholder	Gets replaced by
{{ date }}	date of the original record
{{ sref }}	standardised output map reference of the record
{{ taxon }}	identification name given to the record (scientific or common name, as originally entered by recorder)
{{ common name }}	preferred common name for the organism, or the accepted scientific name if there is no common name available
{{ preferred name }}	accepted scientific name for the organism
{{ taxon full name }}	accepted scientific name for the organism, with the common name appended in brackets if it is available
{{ rank }}	rank of the name given to the organism, e.g. species, genus
{{ action }}	the action you are taking, e.g. "queried" or "accepted as correct"
{{ location name }}	location name of the record
for redeterminations only:	
{{ new taxon }}	the new identification name given to the record on redetermination
{{ new common name }}	the new preferred common name for the organism, or the accepted scientific name if there is no common name available
{{ new preferred name }}	the new accepted scientific name for the organism
{{ new taxon full name }}	the new accepted scientific name for the organism, with the common name appended in brackets if it is available