

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 4, 13 March 2017) to verifying records on iRecord. If you have any additional questions please contact us on iRecord@ceh.ac.uk.

For general guidance on adding records to iRecord see the [Help page](#), and the more detailed [guidance on the NBN website](#). See the [About iRecord](#) page for more information about iRecord's key features, and visit the [iRecord forum](#) to chat with other users, ask questions and make suggestions to improve the site.

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1. How to become a verifier

Verifiers on iRecord are set up by agreement with relevant recording schemes and societies, or for particular recording projects. Contact us on 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. Let us know your email and iRecord user name – if you haven't yet registered on iRecord you will need to do so: click [here](#) to register.

Once you have been set up as a verifier you will see the additional 'Verify' menu at the top of the iRecord pages. You can also see the list of taxon groups you are set up to verify by clicking on My Account and going to the 'View' tab. 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 link to the BRC database for verification purposes.

Verifiers are asked to assess the correctness of the records, and give each one an appropriate status, using either a simple set of three terms (Accepted, Not accepted or Unconfirmed; verification status 1 in the table below) or a finer-grained set of six terms (verification status 2). The majority of verifiers have opted to use the status 2 terms, but the choice is up to you.

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 has a high degree of confidence that the record is likely to be correct, based on difficulty of ID, date, location and recorder skills/experience etc.
Unable to verify	The verifier has a high degree of confidence that the record is likely to be incorrect based on difficulty of ID, date, location and 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 not 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 Gateway 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 wish to work with such records for analysis, 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

If you use the status 2 terms, the relevant status 1 term will be automatically applied as well, so that if you set a record to “Considered correct”, the iRecord database will store “Accepted: Considered correct”. See [section 4](#) below for how to set your verification page to display the status 1 or status 2 terms.

3. Viewing the details for a single record

3.1 Click on the Verify tab. You will see a page showing all available records in a table ('grid') and on a map:

The screenshot shows the 'Verify' page in iRecord. The 'Verify' tab is selected in the top navigation bar. Below the navigation bar, there are buttons for 'Review grid' and 'Review tick list'. A table of records is displayed with columns for ID, Source ID, Species, Common name, Site name, Grid ref, Date, Last updated, Recorder, Images, and Auto check. To the right of the table is a map of the United Kingdom with blue dots indicating record locations. Below the map is a 'You can:' section with instructions on how to use the grid and filters.

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:

The screenshot shows the 'Verification' section in iRecord. The 'Context' dropdown menu is open, showing options for 'Moths; Berkshire; Harvey, Martin' and 'Soldierflies; Harvey, Martin'. The 'Verify' tab is highlighted in the top navigation bar.

3.2 The grid is sorted by the date when the record was added to the system, with the most recently added records at the top, but you can change the sorting by clicking on any of the column headings:

The screenshot shows the record grid with column headers: ID, Source, Species, Common name, Site name, Grid ref, Date, Recorder, Images, and Auto check. The 'Species' column header is highlighted with a red box, and a 'Sort by Species' button is visible below it.

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

The screenshot shows the record grid with pagination controls. The 'Showing records 1 to 30 of 2039' text is highlighted with a red box.

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.

3.4 Click once on any record in the grid to view its details in the panels on the right-hand side of the screen, and double click on it to zoom to its location on the map:

Verify

Context: Soldierflies; Harvey, Martin Filter: Select filter... Apply Reset Create a filter

Records | Log

ID	Source ID	Species	Common name	Site name	Grid ref	Date	Last updated	Recorder	Images	Auto check
4688010	23 42	Bombylius major	Bee Fly	Woudham Common nature reserve	TQ72646315	13/03/2017	13/03/2017 20:25			<input checked="" type="checkbox"/>
4687966	23 42	Villa modesta	Dune Villa	NWT Holme Dunes	TF71174501	19/07/2004	13/03/2017 20:17			<input checked="" type="checkbox"/>
4687335	23 100	Bombylius major	Bee Fly	College Lake BBOWT	SP933144	13/03/2017	13/03/2017 16:47			<input checked="" type="checkbox"/>
4686354	23 42	Bombylius major	Bee Fly	Woffenwood Common: The Leys	SO69875155	13/03/2017	13/03/2017 14:57			<input checked="" type="checkbox"/>
4686282	23 42	Bombylius major	Bee Fly	SY07779123	SY07779123	13/03/2017	13/03/2017 14:38			<input checked="" type="checkbox"/>
4686278	23 374	Bombylius major	Bee Fly	Hazleton Common	SU703121	13/03/2017	13/03/2017 14:35			<input checked="" type="checkbox"/>
4685843	23 42	Bombylius major	Bee Fly	Malvern	SO77764776	13/03/2017	13/03/2017 13:00			<input checked="" type="checkbox"/>
4534613	29 54	Haematopota pluvialis	Notch-horned Cleg	Greenmount Campus, Antrim	J155847	28/06/2016	05/03/2017 13:58			<input checked="" type="checkbox"/>
4534530	41 142	Tabanus bromius	Band-eyed Brown Horsefly	Llantarnam, Cwmbran, Torfaen.	ST31219303	16/06/2016	05/03/2017 13:35			<input checked="" type="checkbox"/>
4533862	23 42	Chrysopilus cristatus	Black Snipefly	Wingate Wood	SD58370803	11/07/2016	04/03/2017 20:28			<input checked="" type="checkbox"/>
4533811	23 42	Beris fuscipes	Short-horned Black Legionnaire	Wingate Wood	SD58370801	12/05/2016	04/03/2017 19:45			<input checked="" type="checkbox"/>
4533777	23 42	Rhagio scolopaceus	Downlooker Snipefly	Wingate Wood	SD58360805	17/05/2016	04/03/2017 19:27			<input checked="" type="checkbox"/>

Map: Google Maps showing location of records.

Set status:

Other actions: Query Send to expert Redet. Edit

Details Experience Phenology Media Comments

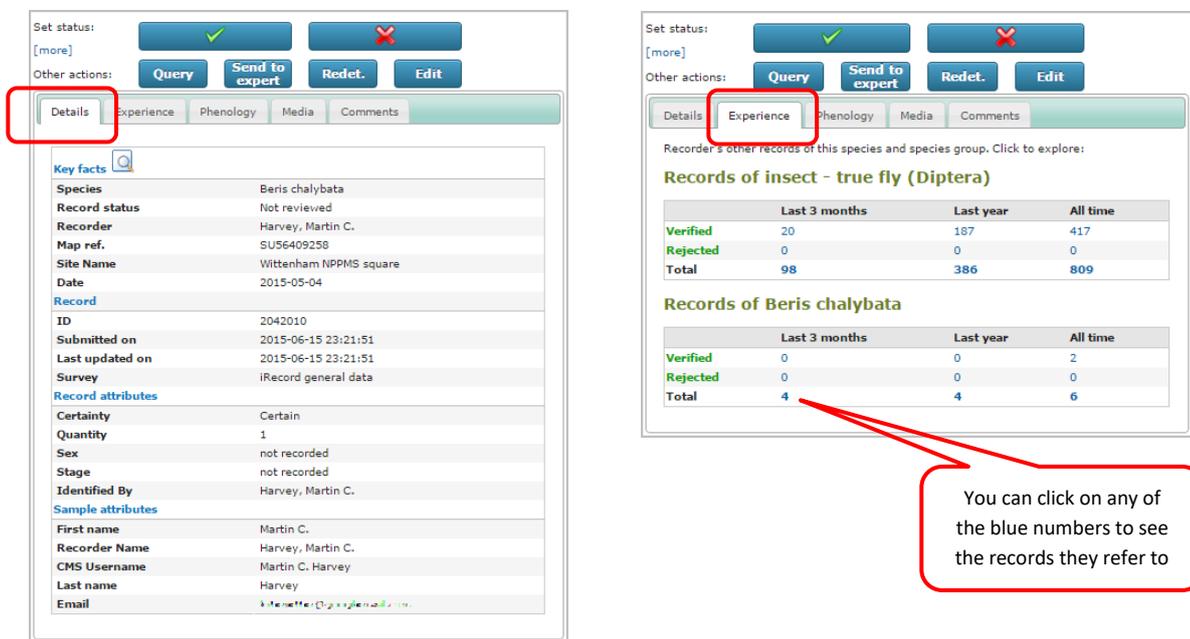
Key facts

Species	Bombylius major
Record status	Not reviewed
Recorder	
Map ref.	SU703121
Output map ref.	SU7012
Site Name	Hazleton Common
Locality	South Hampshire
Date	2017-03-13
Record	
ID	4686278
Submitted on	2017-03-13 14:35:36
Last updated on	2017-03-13 14:35:36
Survey	iRecord App
Record attributes	
Abundance	1

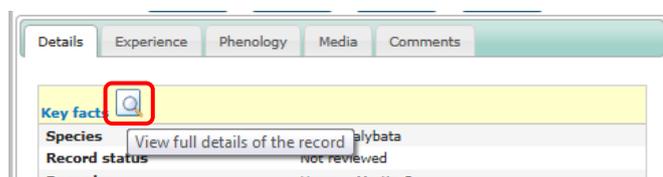
Depending on the speed of your internet connection, when you click on a record in the grid it can take a few moments for the panels on the right-hand side to update and show the correct details – make sure that you are looking at the same record on left and right of the screen before clicking any of the verification buttons!

.../continued

3.5 Having selected a record, use the different tabs in the right hand column under the map to view details of the record and of the recorder's experience. You can also see a plot of the phenology of the species (derived from previously submitted records), any photos associated with the record (under "Media"), and any Comments attached to the record (these will include any automated rule checks, plus any comments that you or others have added to the record):



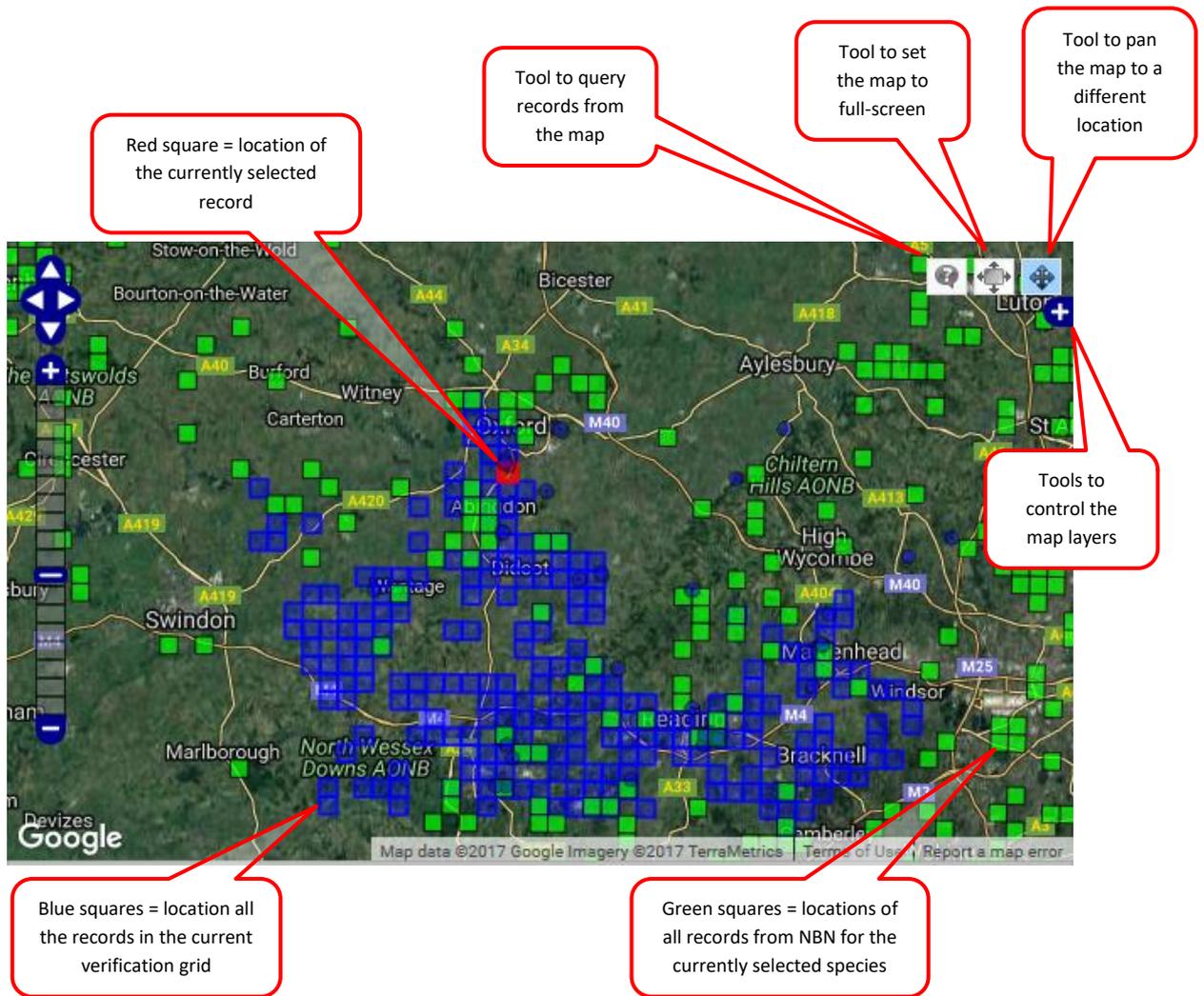
From the "Details" tab you can click on the magnifying glass icon to open up a new web page with the full record details displayed:



3.6 Wherever you see a photo thumbnail image you can click on it to view it at a larger size. To see it at the **maximum** available size right-click on the thumbnail image and select 'open image in a new tab'. (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.)

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3.7 The map is provided to give some context to the record and allow you to check whether the record location seems to be correctly recorded:



3.8 If you go back to the grid, you can use the “Log” tab to see a list of your verification activity. By default this is in descending order of the *Comment ID* number (which is different from the *Record ID* number), but as with any of the grid views you can re-order it by clicking on the relevant column heading, e.g. to order it by “Log date” to see your most recent activity (clicking once on Log date will put the oldest activity at the top of the list – click on Log date a second time to put the most recent activity at the top of the list).

Verify

Context: Moths; Berkshire; Harvey, Martin Filter: Select filter... Apply Reset Create a filter Review grid

Record Log

Comment ID	Comment	Log date	By	Record ID	Species	Common name	Grid ref	Date
2334465	This is another one that looks more like Smoky than Common to me. -- Martin Harvey Berkshire County Moth Recorder	2016-07-06 20:42:20	Harvey, Martin	3608796	Mythimna impura	Smoky Wainscot	SU38497502	03/07/2016
2334464	This one looks quite strongly marked with dark streaks, might it be Smoky Wainscot? Were you able to check the hindwings? -- Martin Harvey Berkshire County Moth Recorder	2016-07-13 22:02:28	Harvey, Martin	3649898	Mythimna impura	Smoky Wainscot	SU38477506	09/07/2016
2294912	Colour is a better match for Yellow-tail.	2016-07-23 14:50:06	Harvey, Martin	3722335	Euproctis similis	Yellow-tail	51.616N, 1.159W	23/07/2016
2294195	Markings not quite right for Dingy Shears, I think this is Straw Underwing. -- Martin Harvey Berkshire County Moth Recorder https://sites.google.com/site/berksmoths/	2016-07-29 01:16:50	Harvey, Martin	3760103	Thalpoephila matura	Straw Underwing	SU71436844	28/07/2016
2293710	I emailed this record to the recorder for checking.	2016-07-23 14:50:06	Harvey, Martin	3722335	Euproctis similis	Yellow-tail	51.616N, 1.159W	23/07/2016
1895992	Caterpillar - record adjusted accordingly	2012-09-13 14:10:59	Comont, Richard	91798	Eilema lurideola	Common Footman	SU50439410	13/09/2012
1895991	This record's verification status needs to be rechecked as it has been edited.	2012-09-13 14:10:59	Comont, Richard	91798	Eilema lurideola	Common Footman	SU50439410	13/09/2012

As with the normal “Records” view of the grid, if you select any individual record by clicking on its row, you can see the full record details in the panel on the right-hand side of the page.

4. Verifying a single record

(It's also possible to add a verification status to a group of records ('bulk verification') – see [section 6](#) below.)

4.1 Setting the verification status: for a single record the verification status is set using the “Set status” buttons on the right hand side of the page. IMPORTANT: you can choose to work with verification status 1, a simple choice between “Accepted” and “Not accepted”, or you can click on “More” to use the additional verification status 2 choices.

- Verification status 1 options
(click on “more” to see status 2 options):

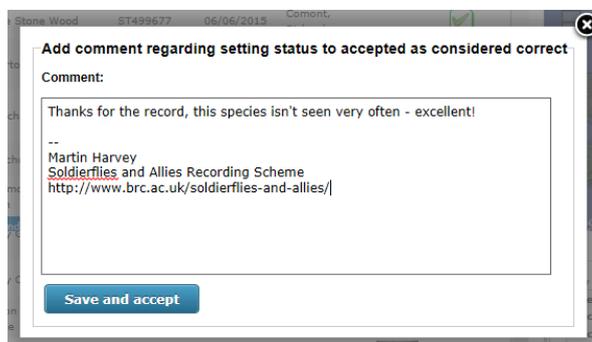


- Verification status 2 options
(click on “less” to return to status 1 options):



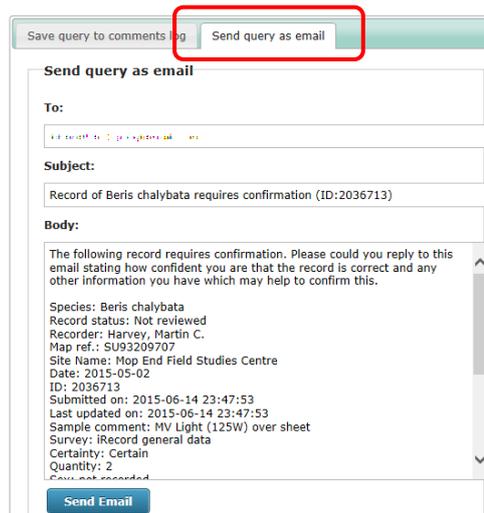
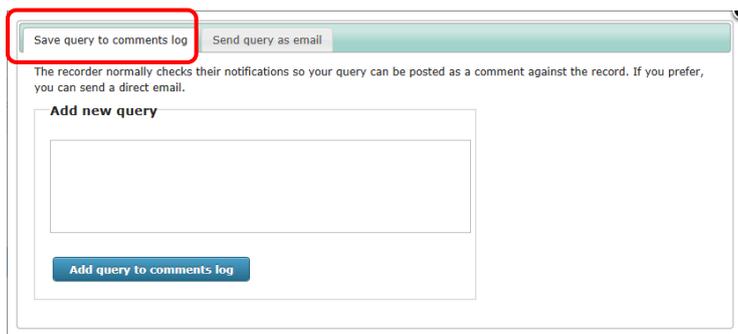
It is up to you and your recording scheme or project to decide whether to use the status 2 terms or not, but most verifiers on iRecord do use them. See [section 2](#) above for an explanation of the different status 1 and status 2 terms.

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](#) below for more on 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.:



4.2 The blue buttons beneath the verification status buttons provide a range of other actions that you can use when needed:

4.2.1 **Query:** when you click this a window will open that allows you to either add a comment to the record itself, or to send an email to the recorder, along with some information about whether the recorder in question normally checks their notifications when a comment is added.



- **Save query to comments log:**
If you type your query in to this box, then it will be stored in the set of comments associated with the record. The original recorder will be alerted that a comment has been added, and hopefully they will respond by adding their own 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! (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 query as email:**
If you choose this option, a window will open up that is already set up with the record details, and into which you can type in your queries. 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.)

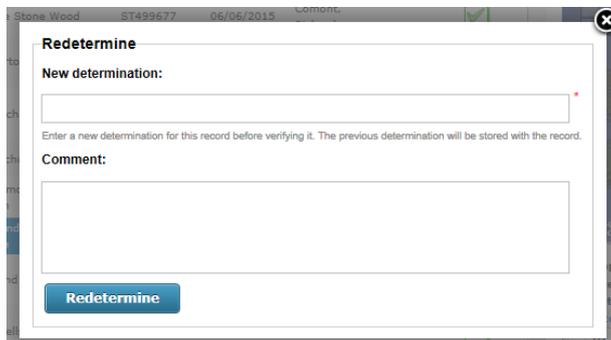
Whichever option you use, the record will be flagged in iRecord as having been queried, and you can get back to check any of your queried records from the verification page, where in the "Filter" dropdown you should have an option for "Queried records":



Once Queried, a record will remain flagged as Queried the verifier changes the verification status of the record.

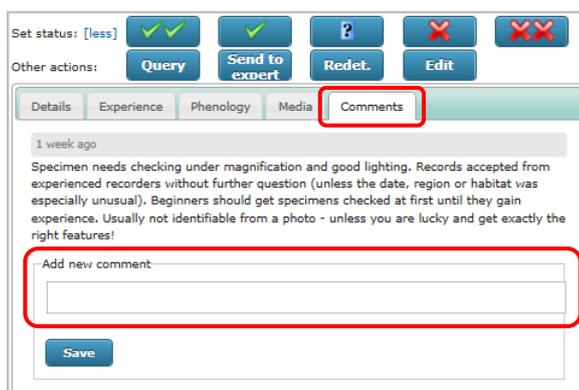
4.2.2 Send to expert: this opens up another email window, with text containing the record details. You can use this to send an email to anyone that you wish to who may be able to help confirm the identification or offer an opinion on the record. If there are photos associated with the record on iRecord a link to these will be included in the email.

4.2.3 **Redet.:** 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 level). This does not affect the verification status – if you redetermine to another species in your own taxonomic group the record will remain 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).



4.2.4 **Edit:** this allows you to edit the original record (this button will only be available if the record source allows editing rights). In many cases it will be better to ask the original recorder to do any editing that is required, but as a last resort (e.g. if the recorder does not respond to emails) it is possible for the verifier to edit the record. Please use this option with caution, especially if the record you are editing may be part of a list, as any changes you make could change records in other species groups as well as yours.

Finally, it is possible to add a comment directly to the Comments tab (e.g. if you wish to add a comment about a record but don't wish to formally mark it as queried):



All comments (whether added direct or via the verification status or query buttons) will appear in the comments tab, along with any replies from the recorder (see [section 5](#) below). The recorder will see that you have verified, queried or rejected their record if they log into iRecord and view their notifications (if you want a more direct response it may be best to e-mail the recorder as described above).



5. Comments in iRecord

Any comments that are supplied as part of the of the original record are shown under the “Details” tab on the right-hand side of the page. There is also a “Comments” tab, and this is where you will see any comments added to the record **after** it was entered. There are a number of ways in which comments can be added to this section:

- You (or any iRecord user) can “Add a comment” to any record in iRecord
- If you redetermine or edit a record (see section 4.2 above) a comment will be added to show the change
- If you query a record a comment will be stored
- If you add a comment as part of your verification decision (see 4.1 above) it will be stored here

If a record has generated some discussion between you and the recorder there may be a whole string of comments

The screenshot shows the 'Comments' tab of an iRecord record. At the top, there are buttons for 'Set status' (with icons for success, warning, and failure) and 'Other actions' (Query, Send to expert, Redet., Edit). Below these are tabs for 'Details', 'Experience', 'Phenology', 'Media', and 'Comments'. The 'Comments' tab is active, showing a list of comments:

- Harvey, Martin 1 month ago: Colour is a better match for Yellow-tail. (Callout: A comment added with the redetermination)
- Harvey, Martin 1 month ago: Record last edited as Euproctis similis. (Callout: Record was redetermined)
- Harvey, Martin 1 month ago: I emailed this record to the recorder for checking. (Callout: Record was queried)
- [Redacted] 8 months ago: Record was determined as Euproctis chrysorrhoea. (Callout: The determination made by the original recorder (only shown here if a redetermination has been added))

At the bottom, there is a text input field for 'Add new comment' and a 'Save' button. A callout points to this area: 'Any additional comment could be added here'.

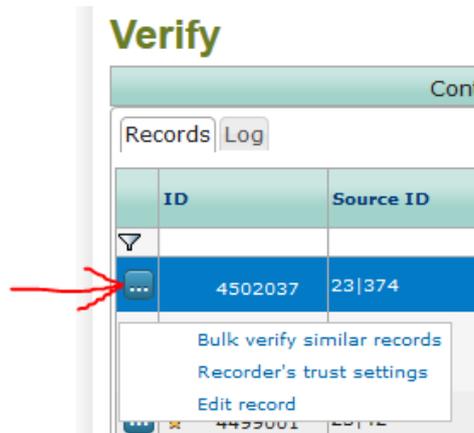
Remember that all these comments are stored with the record and are visible to anyone who views it on iRecord.

6. Verifying multiple records ('bulk verification')

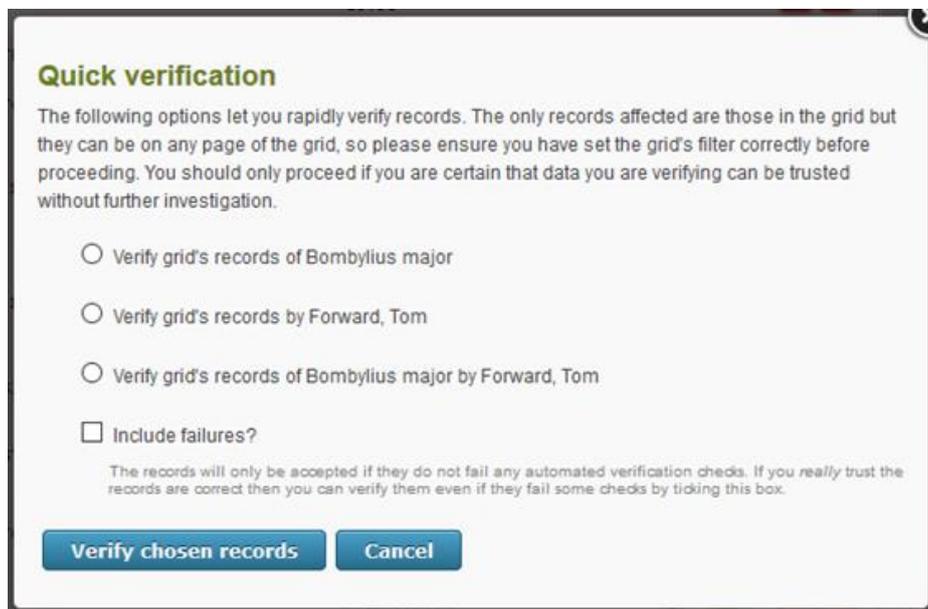
There are three ways in which you can set a verification status for a whole set of records at once. These all require careful use to ensure that you have selected the set of records you want, before applying the verification – there is no “undo” option for bulk verifications.

6.1 Bulk verification of similar records

First filter your records if needed, as described in [section 8](#) below. You can click on the blue “Record tools” button to the left of any record:



If you now click on "Bulk verify similar records", you get taken to this pop-up window:



- If you were to choose the first option, ALL the records in your verification grid for species *Bombylius major* would be marked as Accepted (and "all" means "all", on every page of your verification grid, not just the 30 that you can see at any one time). Use with care!
- If you were to choose the second option, ALL the records in your verification grid made by the recorder "Forward, Tom" would be marked as Accepted. Use with care!
- If you were to choose the third option, ALL the records of species *Bombylius major* in your verification grid made by the recorder "Forward, Tom" would be marked as Accepted. Use with care!

And then there is the final "Include failures?" tick box. If you leave this unticked, the bulk verification would only be applied to records that passed the automated checks in iRecord (the checks that tell you whether a species is hard to identify, or has been recorded outside its normal range, see [section 9](#) below). If you tick this box, **ALL** records will be Accepted in the bulk verification even if they do not pass the automated checks.

You'll see that the blue “Record tools” button also allows you to specify that a particular recorder is "trusted", which gives you some extra filtering options (see [section 7](#) below).

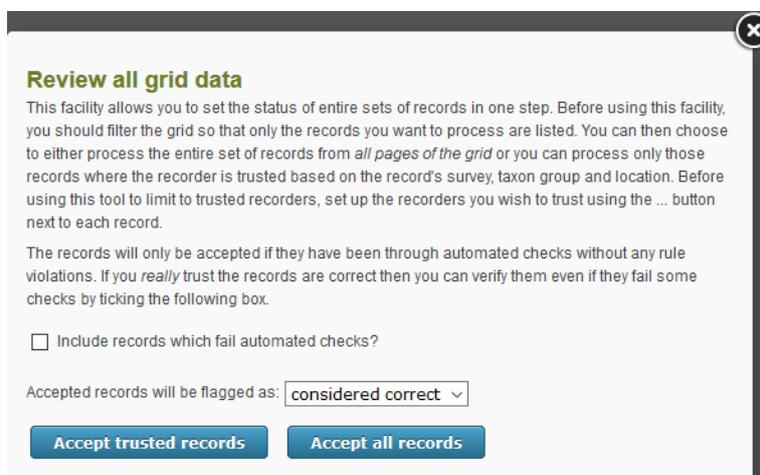
For all of the above options, please note that your verification grid might run over several pages (even if you have filtered it first), and the bulk-verification will affect **ALL** records on **ALL** pages. Please therefore ensure you have set the grid's filters correctly before proceeding with bulk verification. This method of bulk verification results in records being given the verification level 1 term "Accepted" (that is, you cannot distinguish between "Correct" and "Considered Correct").

6.2 Review the grid

Near the top of your verification page you should have a button for "Review grid" (the exact position of these buttons will vary depending on your computer's screen):



If you click on the Review grid button it opens up this pop-up:



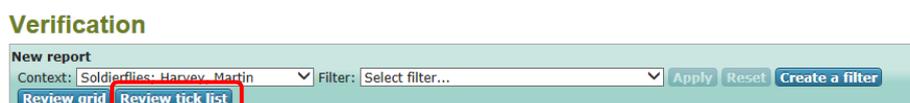
You have three choices to make:

- Do you want to add a verification status to records that have failed one or more automated checks? If you do, tick the box to "Include records which fail automated checks".
- This option will only be visible if you have set your verification grid to use the level 2 verification terms (i.e. the extended terms including "Considered correct", "Plausible" etc.) Do you want to set all the grid's records to be "Correct", or "Considered correct"? Choose from the drop-down box.
- Do you want to add the verification status to only those records that come from "trusted recorders" (see [section 7](#) below), or to ALL the records in the grid? Click on one of the blue buttons to make this choice.

This allows you to verify ALL the records that are currently on display in the verification grid (across all pages). Once again this is a potentially dangerous thing to do, and you need to be certain that you have correctly filtered the grid first, to select those records you are happy with, before using the "Review grid" button. You might, for instance, set up a filter so that the grid only shows records for a common and easily-identified species, and then use "Review grid" to accept all those records on one go. (See [section 8](#) below for more on filtering.)

6.3 Use tick boxes to review a set of records

Above the verification grid there is also a button for "Review tick list":



If you click on this button, it adds tick boxes to the left of each individual record in the grid, and moves your Accept/Reject buttons to the top of the grid:

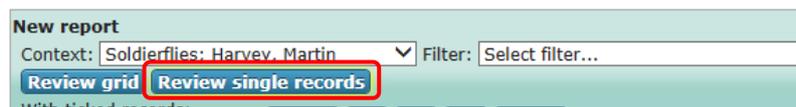


You can check several records on the current page of the grid, and for each one that you are happy with put a tick in the box to its left, and then use the Accept/Reject buttons to verify all the ticked records in one go. This tool only applies to the records ticked, it doesn't do anything to records that are on subsequent pages of the verification grid. So in some ways it is the easiest to control of all three bulk verification options, in that you can see exactly which records you have ticked before committing to a verification. But it does mean that you have to tick the records individually.

Use the relevant button to apply the same verification status to all the selected records. As before, you can choose to use the “more” option with five choices of verification status, or the “less” option with just two. You will have the option of adding a comment to the records before confirming your verification – note that this comment will be applied to all the records you have ticked.

(Note that the buttons in the right-hand column (Query, Send to expert, Redet.) do not work with the tick box selection, if you use them they will only apply to the record you clicked on most recently.)

To return to the standard verification grid without tick boxes, click on the button to “Review single records”:



6.4 Establishing a routine

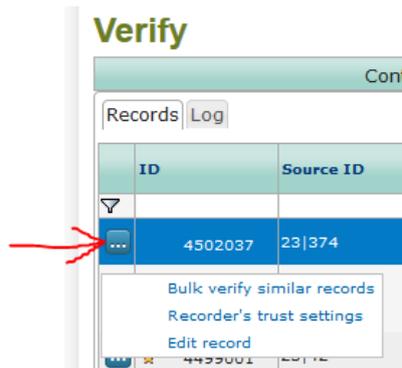
The various options for filtering and for verifying records in bulk offer many ways in which verification can be organised. It's worth spending some time thinking about what works best for your purposes. If your scheme receives records at a relatively slow pace you may well be able to verify each one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

One option is to use the filters to select all the records from one particular recorder. You can then pick out anything from that person's records that looks unusual in any way, e.g. if it is a rare species, or a species that is difficult to identify, or is from an unusual location or date. You might also wish to look at all their records with photos attached, to get a feel for the accuracy of their identifications. Having dealt with any unusual records you can then choose to bulk verify all the records that remain in the grid for this particular recorder.

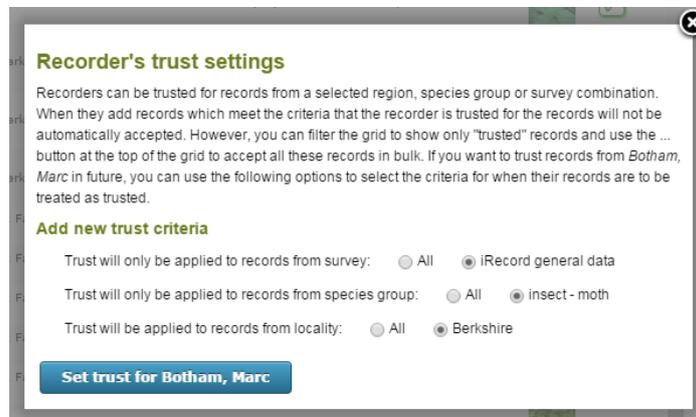
7. Setting recorders as 'trusted'

You can give a recorder 'trusted' status for records from a selected region, species group or survey combination. This will enable you to filter records to show only those by 'trusted' recorders and to bulk-verify all records from trusted recorders. However, think carefully whether you want to do this – remember that even experts can make a mistake with data entry! But the tool is there to use if you have recorders whose records you would normally accept without question.

Click on the blue Record tools button to the left of any record and select 'Recorder's trust settings':



Use the resulting pop-up screen to select whether the trust settings should apply to records from all surveys and localities, or just specific ones, and click 'set trust':



See above (section 6) for how the “Trusted recorder” settings can be used to help verify large sets of records. Note that if more than one verifier is dealing with a set of records for a particular species group and geographical area, it is possible for a recorder to be set as Trusted by one verifier without other verifiers being aware of this.

8. How to filter and select records to verify

As discussed in the previous section, filters are a vital part of using the bulk verification tools. There are two main ways of filtering the records in the verification grid. The first allows relatively simple temporary filters to be applied, the second allows more complex filters to be created and then saved for subsequent re-use.

8.1 Temporary filtering: You can filter the list 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 (or use the tab key) to move away from the box you typed in to. You can use * as a wild card. This allows you to, for instance, select all the records for one particular recorder so that you can verify their data in one block, or all records for a species group, etc.:

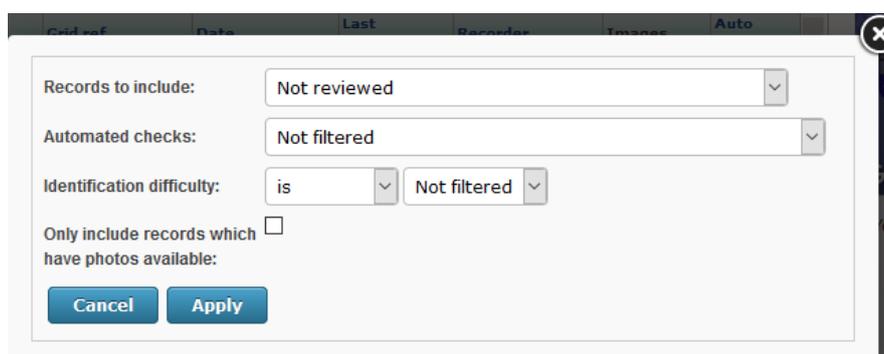
Verification

New report									
ID	Source	Species	Taxon Group	Site name	Grid Ref	Date	Recorder	Images	Check
			*fish						
161050	iRecord iRecord iSpot	Scyliorhinus canicula Dogfish	cartilaginous fish (Chondrichthyes)	The Waldrons	SZ990960	02/10/2011	bkh43		✓
160870	iRecord iRecord iSpot	Labrus mixtus Cuckoo wrasse	bony fish (Actinopterygii)	The Waldrons	SZ990960	02/10/2011	bkh43		✓
160959	iRecord iRecord iSpot	Salmo trutta Brown Trout	bony fish (Actinopterygii)	Rannoch	NN6558	10/07/2010	Bluedun		✓

8.2 Persistent filtering: 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 click on as many of the boxes as you wish to create a customised filter.



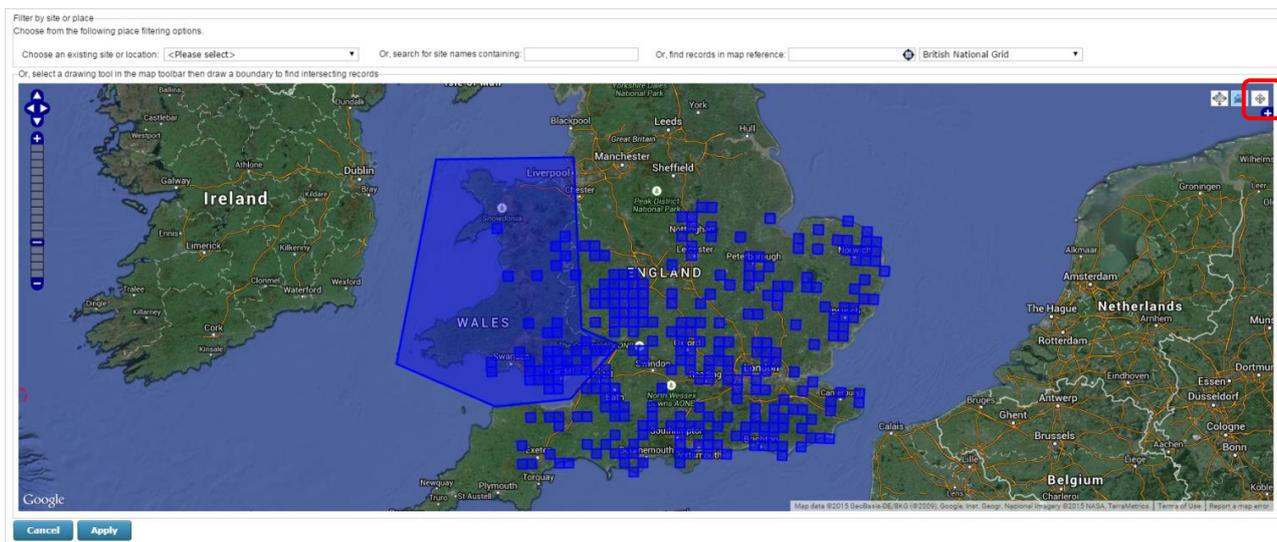
For example, you can use the 'Quality' filter to select only those records which are awaiting verification, and/or have failed one or more automated checks, and/or have a particular level of identification difficulty (if part of a species group that has had ID rules created) and/or have a photo attached:



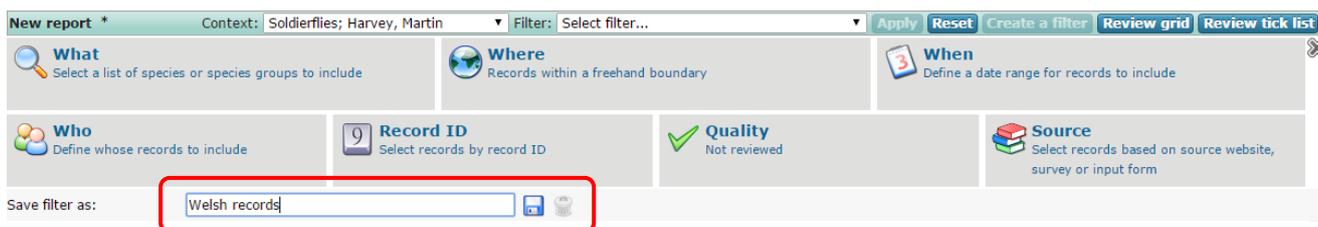
The options available under "Records to include" are:

Option	Result
Accepted as correct records only	Displays only those records that are marked as "Correct" (excludes records marked as "Considered correct")
Accepted records only	Displays all records marked either as "Correct" or as "Considered correct"
Reviewer agreed at least plausible	Displays all records marked either as "Correct" or as "Considered correct" or as "Plausible"
Recorder was certain	Displays all records where the original recorder stated that they were "Certain" of the identification
Recorder thought the record was at least likely	Displays all records where the original recorder stated they were "Certain" of the identification or that it was "Likely"
Not reviewed	Displays all records that have not had a verification decision attached to them (this is the default option when you first arrive on the Verification page)
Not reviewed but trusted recorder	Displays all records that have not had a verification decision attached to them, but that come from recorders that you have designated as "Trusted" (see section 7 below)
Exclude not accepted records	Displays all records <i>except</i> those marked as "Incorrect" or "Unable to verify"
Exclude queried or not accepted records	Displays all records <i>except</i> those marked as "Incorrect", or "Unable to verify", or that have been queried
All records	Displays all records
Queried records only	Displays all records that have been queried (see section 4.2.1 below)
Answered records only	Displays all records that have both been queried and have received a response from the recorder
Not accepted records only	Displays all records marked as "Incorrect" or "Unable to verify"
Not accepted as reviewer unable to verify records only	Displays all records marked as "Unable to verify"
Queried or not accepted records	Displays all records marked as "Incorrect", or "Unable to verify", or that have been queried

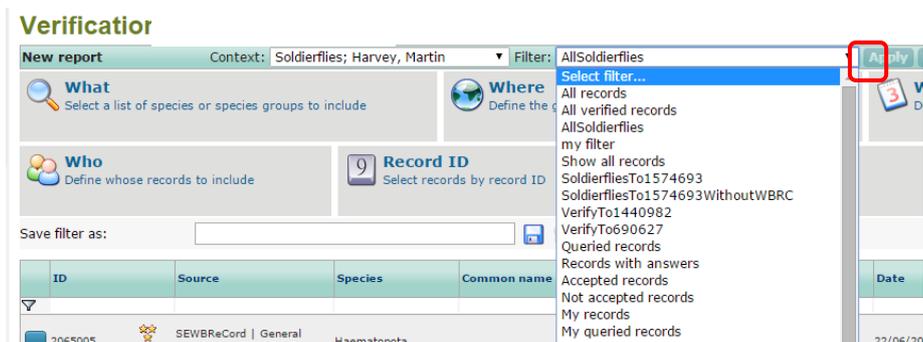
The “Where” filter allows you to select records within a single county or site boundary or grid square, or use the polygon tool (top-right of map panel) to draw your area of interest on the map:



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:



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



For more information on filtering see: www.brc.ac.uk/irecord/filter-settings

9. Automated validation and verification

An increasing number of online recording websites are becoming linked to iRecord, generating a large volume of data from a widening community of recorders. To help recorders understand which records might need additional evidence, and to help verifiers flag up records that need a thorough check, automated validation and verification tools are built in to iRecord, based on the [NBN Record Cleaner](#) approach.

Some validation is applied at the data entry stage, so that records cannot be submitted unless the date and grid reference are in the correct format, and species names are selected from the UK Species Inventory to avoid spelling mistakes and to ensure consistency.

For records of species that have been given NBN Record Cleaner verification rules (developed by experts at national recording schemes) checks are carried out to highlight records which are outside the known geographical or seasonal range of the species. They are also integrated into the data entry forms to highlight records of species which are difficult to identify, as shown below.

Species	Certainty	SACFOR/P Abundance
 Zygaena lonicerae - Narrow-Bordered Five-Spot Burnet insect - moth 		
Species that are difficult to identify. Even experienced recorders may be expected to provide additional evidence, for example a specimen, particularly if the record is outside of the normal flight period or geographical range of the species.		
 Dark Dagger - <i>Acronicta tridens</i> insect - moth 		
Species that can only be identified following critical assessment, often involving dissection and examination of genitalia. A specimen should be retained for confirmation.		

If a record triggers one of these automated rules, the recorder receives a message via their notifications page, with the option of viewing or editing the record or simply removing the message. The results of the automated verification checks are represented by icons in the right-hand column of the grid. Verifiers can filter data to find records which have failed these automated checks, as described above ([section 8.2](#)).

Records which fail the automated checks are not necessarily incorrect. Automated verification is a decision-support tool for highlighting unusual records, and human expertise remains essential in determining whether the record is acceptable. For some species groups the geographical and seasonal rules were based on data from some years ago, and species ranges and seasonality can change, making the rules out of date. The identification difficulty rules take no account of different life stages and other factors which may make the species easier or harder to identify. Rules have not yet been created for all taxonomic groups.

10. What do the symbols mean?

Recorder's confidence	Results of automated checks	Expert's decision
 Recorder certain of species identification	 Record passes all automated verification tests	 Record verified by expert
 Recorder feels that species identification is likely	 Record is of a species which is difficult to identify	 Record rejected by expert
 Recorder uncertain of species identification	 Record falls outside the species seasonal range  Record falls outside the species geographic range  Record falls outside the species historical range (first and last year recorded)	

Please note that the symbol  currently also appears next to records of species for which a Record Cleaner rule has not yet been created.

iRecord is developed by [Biodiverse IT](#) and the [Biological Records Centre](#) in association with the [National Biodiversity Network](#) (NBN). Ongoing development is funded by the [NERC Centre for Ecology & Hydrology](#); initial funding was provided in 2012 by the Heritage Lottery Fund project [OPAL](#). Discussions with a number of [National Recording Schemes](#), [Local Record Centres](#), expert verifiers and recorders have greatly helped shape the development of this site.

This document was originally compiled by Paula Lightfoot, and has subsequently been revised by Martin Harvey with help from John van Breda. Currently (March 2017) at version 4.