

# Guide to entering records via Swift general records form



Greater Manchester Ecology Unit (April 2020)

With edits /additions by RECORD LRC (February 2021)



not submitted this file yet.

help to ensure this database remains credible by only submitting records with an accurate species identification

server(s)\*  
in West, Les Jones

terminer\*  
s Jones

bservation date\*  
2/2020  
2/2020

Location  
Bog garden in Ascheton Park

Position\* dbl click to add pin

LOCATION SEARCH

GRID REF OR COORDS

Chester Zoo

Upton-by-Chester

Grid reference\*  
SJ 4168 7007

Species\* or taxon  
Search for species, genus etc.

Count or abundance  
eg. 2 or c.250 or Dominant etc.

Sex, Stage or Status  
Not recorded

Record type (method)  
Field Record

Records  
(most recent first)

Display Top 50 records (fastest)

Filter  
abundance

# 1 CONTENTS

---

2	Introduction .....	3
3	Registration.....	4
4	Create a recording file.....	5
5	Entering data into the general records form.....	7
5.1	Overview of the form .....	7
5.2	Adding, editing and deleting records .....	8
5.2.1	Understanding data entry – what to put in each field .....	9
5.2.2	Setting your default location and favourite sites list.....	12
5.2.3	Adding more records into your file .....	14
5.2.4	Editing records in your file and adding attachments.....	14
5.2.5	Using the ‘padlock’ function.....	15
6	Managing attachments.....	16
7	Share settings.....	17
8	Returning to and finalising your file .....	18



## 2 INTRODUCTION

---

Swift is a biological recording application. It was created to enable you to record, and report upon, the wildlife you observe. It aims to promote the capture, and availability, of high quality, local biodiversity data for conservation purposes. It replaces 'RODIS', RECORD's previous data entry system.

Swift is administered by RECORD, but it was developed by the Greater Manchester Ecology Unit (GMEU) as part of the Carbon Landscape Citizen Science Project, funded by the National Lottery Heritage Fund.

GMEU have tried to develop a tool which is easy to use and works on most devices, so long as you have an Internet connection.

Registration is quick and free. Once you've registered you can submit records, run reports and much more.

The screenshots in this guide show the generic Swift colours and fonts. These may differ slightly from styles used on the RECORD website. Either way, the methods described in this guide remain the same.

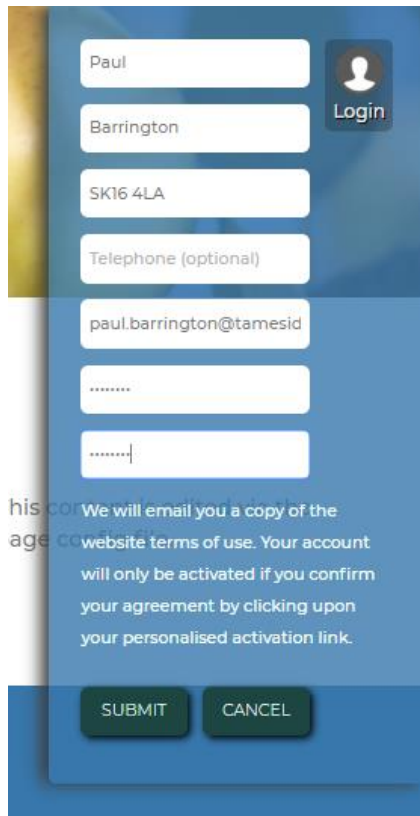
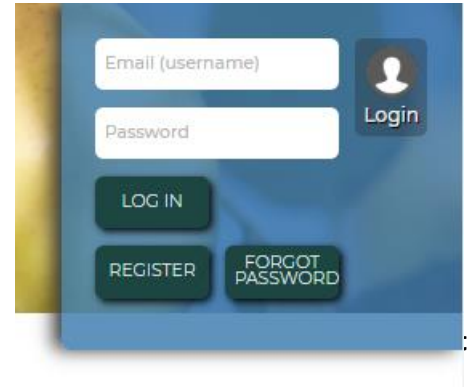
By submitting your wildlife observations, you are contributing towards wildlife conservation. Your records inform decisions, help design appropriate interventions and direct conservation projects. More information on this can be found here on our website. Thank you for your support.

GMEU encourage you to use, and re-use, this information. You are free to copy, adapt, transmit, publish and distribute the contents of this guide. Where you do please acknowledge GMEU as the source. You must not use the information, or images, in a way that suggests GMEU endorse you, or your use of this material. The guide, and Swift itself, are provided as is and without warranty. GMEU are not liable for any errors or omissions. If you discover errors we would love you to report them to [info@gmwildlife.org.uk](mailto:info@gmwildlife.org.uk).

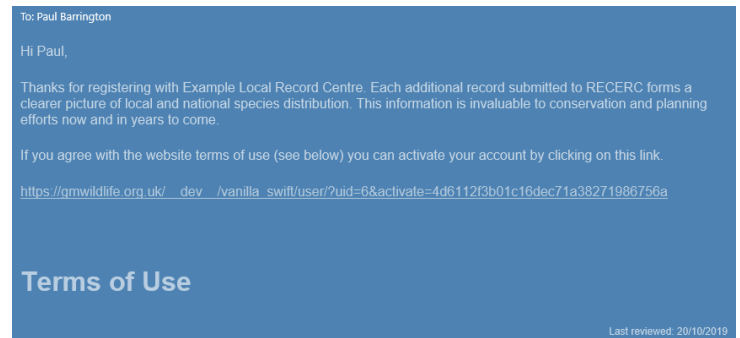
### 3 REGISTRATION

We encourage all users to create a user account before submitting any records. Whilst you can submit records as an unregistered user, having an account allows you to use Swift to its full effect.

Click on the Login icon (top-right) and select 'Register'.

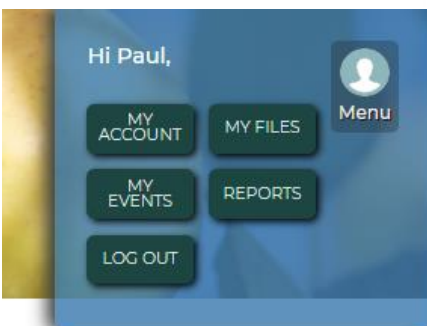
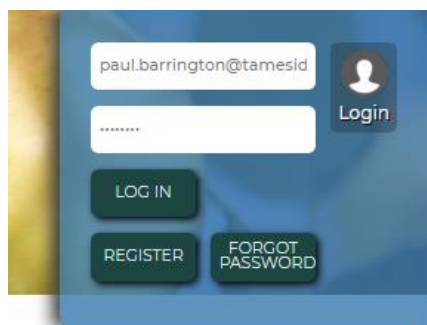


If you agree with the Terms of Use detailed within your welcome email then click on your account activation link. Sometimes our welcome email might end up in your junkmail folder.



Click on the Login button.

Enter your username and password and click on 'Log In'.



Click on the Menu button at any time to display your top-level navigation options.

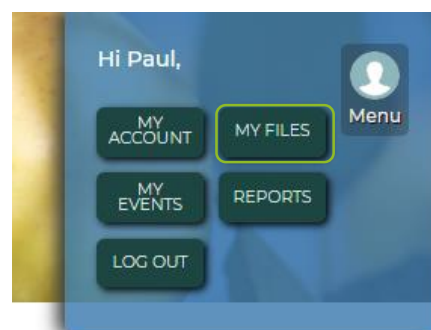
## 4 CREATE A RECORDING FILE

---

Swift encourages users to organise their records into logical record sets. We call these 'files'. Until you are more familiar with the way Swift works, and have a better idea of how you want Swift to work for you, we recommend creating a new file for each survey visit you undertake. You could also create a file for a certain date range, e.g. July 2020 or a certain species group, e.g. 'Bird data 2019'. Files work in the same way that they did on RODIS.

Once you've created a file you can add, update and delete the records within it as you please. When you are ready to share your records with us you need to finalise your file. Once you've finalised a file you lose the ability to update the records within in it. You can however report upon, and download, a copy of your records at any time. By finalising your file you agree to the data being used by RECORD.

Open your Menu and click on the 'My Files' button.



The My record files page is displayed.

*Note: The layout of each page changes depending upon the device you are using. Changing the orientation of phones and tablets will also often rearrange the layout of a page.*

## Widescreen device



# My record files

Use this page to administer your files of records. If you've not worked this way before we generally recommend creating a new file for each survey visit. Once you've created a file you can open it and start adding records. You can revisit each file as many times as you like to add and update records. Once your work on a file is complete you must finalise it. This lets us know that the records inside are ready for us to use and share with partners.

### Create a new file

Type of file\*  
General records form 1.0

File name\*  
e.g. Daisy Nook May 2019

CREATE NEW FILE

### Sort & filter files

Sort by  
Date modified (most recent first)

Display  
All Files

File name filter  
Enter part of the file name e.g. 'brook'

## My files

0 files containing 0 records  
0 submitted files containing 0 records

### Mapping & stats

VIEW STATS FOR SELECTED FILES

MAP SELECTED FILES

Select 'General records form'  
from the Type of file field.

Enter a name for your file.

Click on Create new file.

### Create a new file

Type of file\*

- General records form 1.0
- Select template
- General records form 1.0**
- Records import wizard 1.0
- Daisy Nook, Feb 2020

CREATE NEW FILE

## Narrow-screen device



# My record files

Use this page to administer your files of records. If you've not worked this way before we generally recommend creating a new file for each survey visit. Once you've created a file you can open it and start adding records. You can revisit each file as many times as you like to add and update records. Once your work on a file is complete you must finalise it. This lets us know that the records inside are ready for us to use and share with partners.

### Create a new file

Type of file\*  
General records form 1.0

File name\*  
e.g. Daisy Nook May 2019

CREATE NEW FILE

### Sort & filter files

Sort by  
Date modified (most recent first)

Display  
All Files

File name filter  
Enter part of the file name e.g. 'brook'

## My files

0 files containing 0 records  
0 submitted files containing 0 records

### Mapping & stats

VIEW STATS FOR SELECTED FILES

MAP SELECTED FILES

# 5 ENTERING DATA INTO THE GENERAL RECORDS FORM

## 5.1 OVERVIEW OF THE FORM

### Widescreen device

**General records form**

You have not submitted this file yet.

Please help to ensure this database remains credible by only submitting records with an accurate species identification. If there is any doubt, leave it out.

**Observer(s)\***  
Paul Barrington

**Determiner\***  
Paul Barrington

**Observation date\***  
23/02/2020

**Location**  
e.g. Bog garden in Assheton Park

**Position\*** dbl click to add pin  
LOCATION SEARCH  
GRID REF OR COORDS  
e.g. S3 4158 7047

**Species\* or taxon**  
Search for species, genus etc.  
Taxon group:  
**Count or abundance**  
e.g. 12 or c.250 or Dominant etc.

**Sex, Stage or Status**  
Select sex, stage or status

**Record type (method)**  
Select record type

**Comments**  
Additional useful information

**Sensitive restrict access**

**ADD (CTRL+S)**

0 Records  
Sort by: id (most recent first) | Display: Top 50 records (fastest) | Filter: Show records containing...  
You've not added any records yet

**Attachments**  
Use this widget to manage any files associated with this sample. Each file must be 25MB or less. The following file types are accepted.  
Images: bmp, gif, jpeg, jpg, png, tiff  
Documents: doc, docx, msg, pdf, ppt, pptx, txt, xls, xlsx  
Other: zip

**You have not uploaded any files yet for sample 36.**

**Upload a new file**  
Choose File | No file chosen  
**UPLOAD**

**Finalise file**  
Once you've finished editing these records you need to finalise this file. Doing so will make these records available to RECERC and partner organisations.  
**FINALISE FILE**

### Narrow-screen device

**Examp LRC**

**General records form**

You have not submitted this file yet.

Please help to ensure this database remains credible by only submitting records with an accurate species identification. If there is any doubt, leave it out.

**Observer(s)\***  
Paul Barrington

**Determiner\***  
Paul Barrington

**Observation date\***  
23/02/2020

**Location**  
e.g. Bog garden in Assheton Park

**Position\*** dbl click to add pin  
LOCATION SEARCH  
GRID REF OR COORDS  
e.g. S3 4158 7047

**Grid reference\***  
e.g. S3 4158 7047

**Species\* or taxon**  
Search for species, genus etc.  
Taxon group:  
**Count or abundance**  
e.g. 12 or c.250 or Dominant etc.

**Sex, Stage or Status**  
Select sex, stage or status

**Record type (method)**  
Select record type

**Comments**  
Additional useful information

**Sensitive restrict access**

**ADD (CTRL+S)**

0 Records  
Sort by: id (most recent first) | Display: Top 50 records (fastest) | Filter: Show records containing...  
You've not added any records yet

**Attachments**  
Use this widget to manage any files associated with this sample. Each file must be 25MB or less. The following file types are accepted.  
Images: bmp, gif, jpeg, jpg, png, tiff  
Documents: doc, docx, msg, pdf

This area contains input boxes, and an interactive map, for capturing your observation details.

When you are ready you can finalise the file using this button.

This area displays this file's records. You can sort and filter the records and there are csv and GIS download buttons.

This area is used to manage any files (attachments) associated with this record set e.g. photos or a copy of the licence return form etc

## 5.2 ADDING, EDITING AND DELETING RECORDS

The following pages explain what to put in each field and how to use the interactive map. Mandatory fields are marked with an asterisk \*.

Please help us ensure this database remains credible by only submitting records containing information you know to be correct. If you are in doubt over identification please leave this record out for now. You can find further guidance on how to use this form [here](#). You can also [contact us](#) for help with entering data.

The screenshot shows a data entry form with the following fields and values:

- Observer\***: Iona Cowell
- Determiner\***: Iona Cowell
- Observation date\***: 09/02/2021
- Location**: .e.g. Bog garden in Assheton Park
- Position\***: A map interface with a pink pin and a grid reference of SJ 406 707. The map shows a rural landscape with a field and a road. The text "Backford;Moston" is visible below the map.
- Species\* or taxon**: Search for species, genus etc.
- Abundance or count**: e.g. 12 or c.250 or Dominant etc.
- Sex and/or Stage**: Not recorded
- Record type (method)**: Field Record
- Comments**: Additional useful information
- Sensitive restrict access**: A checkbox that is currently unchecked.

A green button at the bottom right says "ADD (CTRL + S)".

Click on the '?' circles to display useful information for each field whilst entering the data.



## 5.2.1 Understanding data entry – what to put in each field

Field	Notes
Observer*	The name of the person who first spotted whichever species you are recording. Enter the full name if possible.
Determiner*	This is the name of the person that identified the species. For most records this will be the original observer e.g. a hedgehog or magpie are unlikely going to require a second opinion. If a more experienced recorder has determined the species for you, use their name instead. For instance you might have sought advice from a moth or fungi specialist to determine the species you observed. This is also used for example if you posted a photo to an online group and an expert told you what it was.
Observation date*	<p>This is the date that the observation occurred on. The following dates, and date ranges, are valid. Specific dates are more useful than ranges. If you observed something on one day and then again the next day, this should be recorded as a separate record, even if it's in the same place.</p> <p>The following date types can be entered:</p> <p><b>dd/mm/yyyy</b> e.g. 16/04/2019  <b>yyyy-mm-dd</b> e.g. 2019-04-16  <b>dd/mm/yyyy to dd/mm/yyyy</b> e.g. 13/04/2019 to 16/04/2019  <b>yyyy-mm-dd to yyyy-mm-dd</b> e.g. 2019-04-13 to 2019-04-16  <b>Aug 2019</b> or <b>August 2019</b> e.g. 01/08/2019 to 31/08/2019  <b>Mar 2019 to Jun 2019</b> or <b>March 2019 to June 2019</b>  e.g. 01/03/2019 to 30/06/2019  <b>Winter 2019</b> e.g. 01/12/2019 to 29/02/2020  <b>2019</b> e.g. 01/01/2019 to 31/12/2019  <b>2017 to 2019</b> e.g. 01/01/2017 to 31/12/2019</p>
Location	Add a location description if available. This could be a place name (e.g. 'Chester Zoo Nature Reserve', 'Oakhanger Moss'), or an address (e.g. 'Princess Street, Warrington'). Specifics such as 'under a log', 'in a pond' etc. are not appropriate for this field, but could be added in the 'Comments' field.

<p><b>Position* and Grid reference*</b></p>	<p>The interactive map and the 'Grid Reference' field are linked. Adding, or dragging, a pin on the interactive map updates the grid reference. Likewise entering a grid reference relocates the pin on the map.</p> <p>Search for a location incl. parks, addresses and postcodes</p> <p>Enter a spatial reference</p> <p>Re-centre map</p>
<p><b>Species* or taxon</b></p>	<p>This field is linked to RECORD's local species dictionary. Start typing a scientific or common name and you will get a choice of options to choose from. If you can't find the species you are trying to record, use <a href="https://species.nbnatlas.org/">https://species.nbnatlas.org/</a> to check if there are any alternate names you could try. It could also be a new species for our area – please email us for support in this case.</p> <p>In Swift, you can search against known common names, scientific names and BTO 2-letter codes (for birds). It also includes genus, families and aggregates, so be sure to pick the correct entry.</p> <p>Tip: Use spaces as wildcards to speed up data entry OR if you are unsure of spellings.</p> <p>e.g. dald n con                                      OR    gr cr new</p> <p>Once you've selected a valid species (or taxon) the field highlights in green.</p>

<p><b>Abundance or count</b></p>	<p>Where you can, count the number of individuals and enter a number. If you have to estimate e.g. a large flock, then you can add c. before the number e.g. c.150, or use e.g. &lt;10, &gt;200 etc.</p> <p>For plant records where counting individuals isn't sensible, for instance a carpet of bluebells, you can estimate abundance using the DAFOR scale. These are Dominant, Abundant, Frequent, Occasional and Rare. Please use the whole words rather than abbreviations.</p> <p>The field will also accept any other value e.g. Small Population, 20% Coverage, but please try to use numbers, approximate numbers or a valid scale where possible.</p> <p>Please DO NOT use any commas in this field, e.g. 10,500 should be entered as '10500'.</p> <p>Please also DO NOT use any other punctuation apart from full stops. For example, 'Frequent – locally abundant' should be entered as 'Frequent locally abundant' or add 'Locally Abundant' to the comments instead. '10% cover' should be entered as '10 percent cover', etc.</p> <p>Please also ensure you are not entering multiple records by mistake, for example '10 males and 5 females' would need to be entered as 2 different records rather than detailing the male and female numbers in the abundance or other fields.</p>
<p><b>Sex and/or Stage</b></p>	<p>The options available are dependent upon the taxon group of the species you are recording, e.g. it is not possible to select 'Larva' for a bird. Stage refers to the life stage, for example 'Adult', 'Juvenile', 'Dead' or for a plant 'Flowering', 'In Leaf' etc. You can add both the sex and the stage, e.g. 'Adult Female' or one or the other. The more details you know the better, but sex/stage information is not essential. If not known put 'None'. Please do not use things like 'M/F' as this is ambiguous. Please also don't put more than one sex or stage into one record – if you saw an adult and a juvenile or a male and a female, these need to be separate records.</p>
<p><b>Record type (method)</b></p>	<p>This is basically how you recorded it. Records of evidence are just as important as live sightings. For example, you could record 'Faeces', 'Footprint', 'Mole Hill' or 'Gall'. If you used any equipment add this here too. For example, you might have used a moth trap or a net to catch invertebrates. As with sex/stage, record types are limited to those appropriate to the species group, for example you will not be able to pick 'Mole Hill' for a bird. If what you are looking for isn't there, for example a specific type of trap or bat detector, please get in touch with us and we may add it or recommend an alternative.</p> <p>The default (if you are unsure for example) is 'Field Record.' If you have seen a live individual, please now use 'Sighting' rather than 'Field Record'.</p>
<p><b>Comments</b></p>	<p>Any additional information not relevant to the other fields can be added here. For example, if the data was part of an event like a Bioblitz add that here, you could note the weather (if relevant), any additional observers beyond the main one, if a site centroid was used. The record should 'make sense' without the comments, they are to provide additional information, not as an extra space to record information that should be in another place.</p>

<p><b>Sensitive</b></p>	<p>We automatically apply a sensitive flag to records for many species including badgers and Schedule 1 breeding birds, including birds of prey. You can choose to make a record sensitive by checking this box. The sensitive flag masks the precise location of the record, location information and hides the comments from all users apart from ourselves, allowing us to ensure its only shared with those who will treat it carefully and not use it to do harm.</p>
-------------------------	--

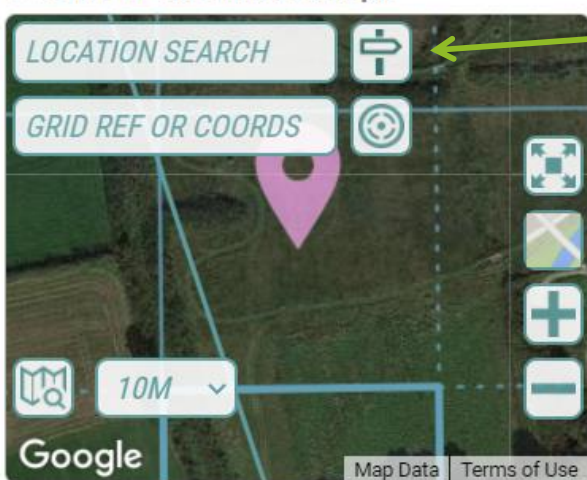
## 5.2.2 Setting your default location and favourite sites list

To make finding the correct location/grid reference easier you can:

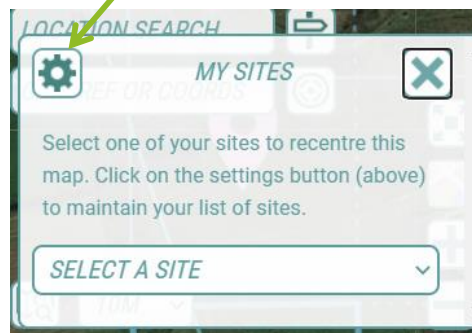
- Choose a **default location** (the area of the map that shows when you first open the general records form)
- Create a list of **favourite sites**, for example areas where you record most often. These will appear as a drop-down list in the 'Location' field and when you click the 'sign post' button on the map within the general records form.

To set default location and create a site list:

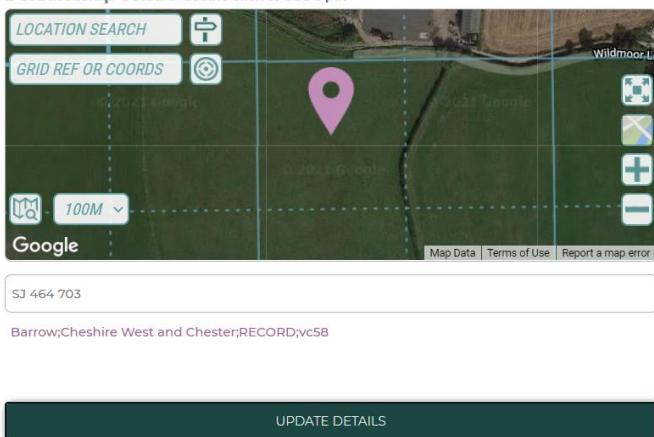
**Position\*** dbi click to add pin



- 1) Click 'sign post' icon
- 2) Click settings icon



**Default map centre** double click to add a pin



To change the default location double click on the map where you want your location to be then click 'Update details'.

### My sites

Create a list of sites that you regularly record at. These sites will become available to you for use via the MapApp. This is a personal site list. Other users won't be able to view your sites.

site name

Spatial reference  +

Chester Zoo: SJ 406 707 x

To create a favourite site, name the site, type in the grid reference you want to use for the site then press the '+' icon. Click 'Update details' to save.

To see the changes you have made, navigate back to the general records form and refresh the page.

If you pick a favourite site from the list, the map will automatically centre on this site and the grid ref will be filled in automatically.

**Observer\*** ?

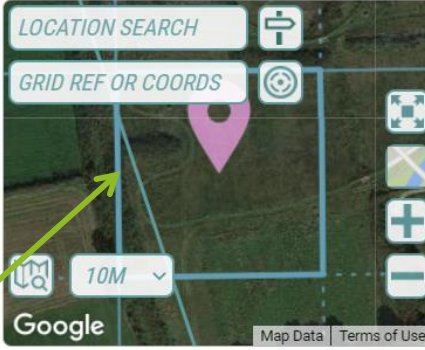
**Determiner\*** ?

**Observation date\*** ?  
  
09/02/2021

**Location** ?  
 x v

**Position\*** dbl click to add pin

**Grid reference\*** ?  
  
Backford;Moston



### 5.2.3 Adding more records into your file




Once you are done entering your observation details click on Add (or use Ctrl + S) and your record will be transferred to the records table below. Repeat this process to add more records to your file.

Location: Lache Backies  
Grid reference\*: S3 38532 64314  
Record type (method): Field Record

ADD (CTRL + S)

1 Records

Sort by: Id (most recent first) | Display: Top 50 records (fastest) | Filter: Show records containing...




id	action	taxon group	common name	scientific name	date	location	grid reference	parishes	abundance	assoc organism	record type	obs
183184	  	bird	Magpie	Pica pica	27/08/2020	Lache Backies	S33853264314		1: Adult	N/A	Visual	lon:

### 5.2.4 Editing records in your file and adding attachments

Use the edit button (pencil) to recall a record for editing. Or use the delete button (bin) to delete this record.

1 Records

Sort by: Id (most recent first)

id	action	taxon group	common name
183184	  	bird	Magpie

It is possible to attach an image to this individual record – for example, a photo of the individual or habitat to confirm ID. You could also add a document, for example email correspondence with a verifier. Click the paperclip then choose a file to upload, following the specifications on the page. Click upload. You can also drag and drop your file.

0 attachments

Upload a new file

Choose file

upload


Upload a new file

Choose file | No file chosen

Drop file here

## 5.2.5 Using the 'padlock' function

You will notice that many of the fields have a padlock symbol next to them.

 **Observer(s)\***

e.g. John West; Les Jones

When this symbol is highlighted (green/blue rather than grey), the details entered into these boxes will be kept for the next record you enter to save you entering them again. This can save a lot of time, but please ensure that you check carefully that nothing needs changing as mistakes can easily happen.

## 6 MANAGING ATTACHMENTS

### Attachments

Use this area to manage attachments. Each file must be 25MB or less. The following file types are accepted.

**Images:** bmp, gif, jpeg, jpg, png, tif, tiff  
**Documents:** doc, docx, msg, pdf, ppt, pptx, txt, xls, xlsx  
**Other:** zip

0 attachments



### Upload a new file

No file chosen

This area allows you to attach additional files to the whole file of records, such as:

- Habitat survey information
- A transect map
- Copies of your licence return or ecological survey report
- Email correspondence with a verifier

### 1 attachments

Filename	Type	
<input type="text" value="licence_return"/>	docx	 

### Upload a new file

No file chosen

To upload a file click on 'Choose File' and then select the file you want to attach. Finally click on 'Upload'.

You can rename a file by overtyping its name.

There are also download (downwards arrow) and delete buttons (bin).

Repeat this process to add more files.



# 7 SHARE SETTINGS

Only fill out this section if you'd like to share this file with other Swift users ('guests') so they can add records. If this section is left blank, your file is only shared with RECORD. Whilst guests can add and submit records, only the file owner (you) can finalise the file.

Use the below settings to control how guests see other people's records including yours within the file (they will always see their own records in full detail).

## Share settings

Use the controls below to set this file up as a shared survey.

**Allow guests to**  
File not shared [default] ▼

**Recorder names**  
Hide names ▼

**Mask record precision**  
Original ▼

**Comments**  
Hide comments ▼

Use this to choose what guests can do (other than adding records).

- View and edit their own records only
- View all records (even from other users) but edit their own records only
- View all and edit all records

Only applicable when 'allow guest to' is set to 'view all' option. Choose whether you want guests to know the observer/determiner names. If you've added anyone other than yourself, ensure you get written permission to share their name to comply with GDPR (data protection regulations).

Only applicable when 'allow guest to' is set to 'view all' option. Choose whether guests can see records at full precision or if you want vaguer locations shown. May be useful for hiding locations of sensitive species and of people's gardens etc.

Only applicable when 'allow guest to' is set to 'view all' option. Choose whether guests can see comments or not. If names of additional recorders or other personal information is shown in comments, please see above regarding GDPR.

**Default date**  
dd/mm/yyyy or 'Aug 2019' or 'last sat'  
dd/mm/yyyy

**Default location**  
e.g. Assheton Park

**Default grid reference**  
e.g. SJ 4158 7047

**Default species or taxon**  
Search for species, genus etc.

**Thank you message**  
We appreciate...

**Redirect URL**  
https://example.com/our\_survey\_inf

Set defaults for the file, to enable quicker data entry by guests. These can be changed by guests as they enter data.

Enter a message that is displayed to your guests when they submit their data.

Optional weblink to redirect guests to once they have submitted and read the thank you message.

**File URL**

http://record-irc.co.uk/swift/user/files/forms/general\_records\_form\_1.0/?sample=295278&share\_token=eb064ca0e03a6e6463aa

**Map file URL**

http://record-irc.co.uk/swift/user/reports/map\_records/?sample=295278&share\_token=eb064ca0e03a6e6463aa

**File statistics URL**

http://record-irc.co.uk/swift/user/reports/taxon\_statistics/?sample=295278&share\_token=eb064ca0e03a6e6463aa

Copy and paste the URLs (or press the pink button to copy) and send them to your guests. Following the File URL link allows guests to access the file. The map file and file statistics functions are currently under construction.

## 8 RETURNING TO AND FINALISING YOUR FILE

If you return to your 'My Files' page you will notice that this file is showing as a 'Draft' file.

We can't use the records in your file until it has been finalised, this allows you to return to it on multiple occasions before submitting.



### My record files

Use this page to administer your files of records. If you've not worked this way before we generally recommend creating a new file for each survey visit. Once you've created a file you can open it and start adding records. You can revisit each file as many times as you like to add and update records. Once the work on your file is complete you must finalise it. This lets us know that the records inside are ready for us to use and share with partners.

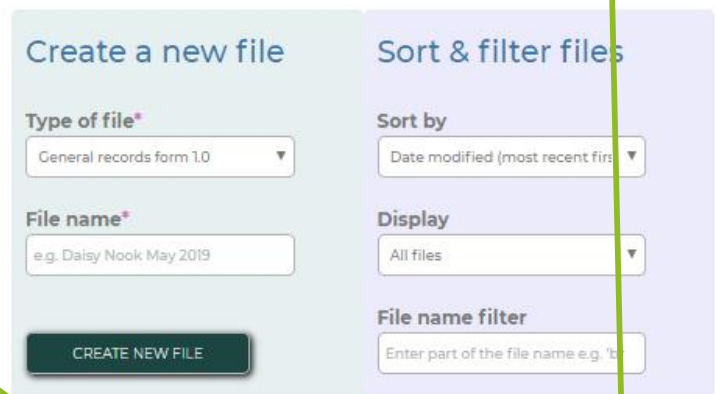
You can reopen any of your files (regardless of whether they are finalised) using the edit button.

#### Finalise file

Once you've finished editing these records you need to finalise this file. Doing so will make these records available to ELRC and partner organisations.



Once your file is open and you are sure you want to submit your records, click on 'Finalise File'. When you do this, you agree to our use for record sharing.



#### My files

1 files containing 1 records  
0 submitted files containing 0 records



Thank you for sharing your records with us.

If you have any questions about using Swift, how to enter data or what data can be entered, please do not hesitate to get in touch: [info@record-lrc.co.uk](mailto:info@record-lrc.co.uk). We are more than happy to answer any questions, and would prefer that you asked about anything you are unsure on rather than entering things incorrectly.