Guide to importing data into Swift

Greater Manchester Ecology Unit (April 2020)

With edits /additions by RECORD LRC (November 2020) – with thanks to our volunteers Rachel Cross and Mark Peters.

1 CONTENTS

2 INTRODUCTION

Please see 'Getting Started with RECORD Swift' for a general introduction to Swift data entry system.

As well as entering records one at a time using the online General Records Form, Swift also allows you to input your records if they are recorded on a spreadsheet. This is especially useful for a lot of records or where the data contains unusual or additional information. This is referred to as 'Importing' data.
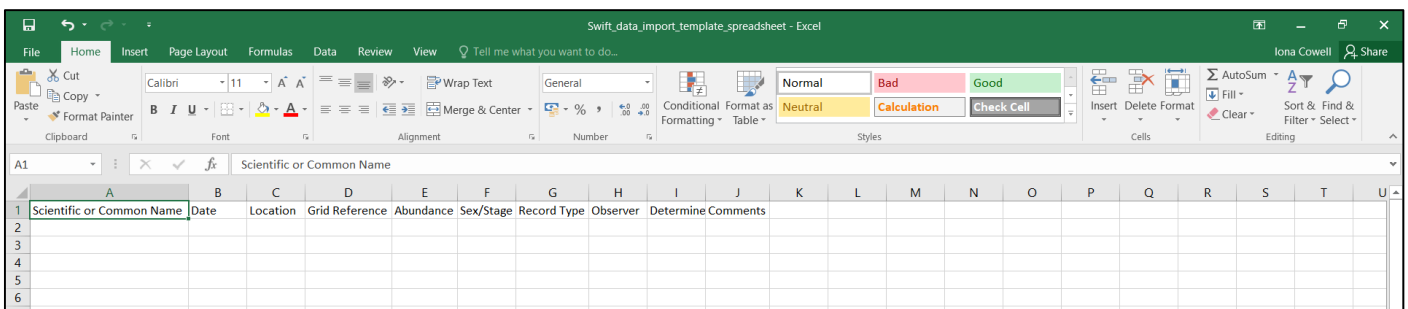
3 PREPARING YOUR DATA

An Excel spreadsheet template recording file is available which includes the following data headers. Each header refers to what would be a 'field' in the general records form. When importing data, you will not be presented with a series of choices to pick from for fields (e.g. sex/stage, record type) as you would be with the general records form. It is therefore important to pay close attention to the data in each field, to avoid errors.

Data column header (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 who 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 used for example if you posted a photo to an online group and an expert told you what it was.
Observation date*	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. The following date types can be entered: **Single date: dd/mm/yyyy** *e.g. 16/04/2019* **Date range: dd/mm/yyyy - dd/mm/yyyy** *e.g. 13/04/2019 - 16/04/2019*
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.

Grid reference*	Enter an OS grid reference. Please record to the highest degree of accuracy possible. The grid ref should be in the standard format, e.g. SJ416654. If you aren't sure of a grid reference, https://gridreferencefinder.com/ may be useful. Or use the Swift Map app.
Species or taxon*	Where possible please use the scientific name. Common names are also acceptable but may take longer to import due to the necessity to easily match the species name to a valid species within the NHM UK species inventory: https://www.nhm.ac.uk/our-science/data/uk-species/species/index.html . Alternative names for species and up to date scientific names can be found here: https://species.nbnatlas.org/.
Abundance or count	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. <10, >200 etc. 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. It is possible to use e.g. 'small population', 20 percent coverage' etc. but please try to use numbers or approximate scales where possible. Please DO NOT use any commas in this field, e.g. 10,500 should be entered as '10500'. 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. Please also ensure you are not entering multiple records into 1 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.

Sex and/or Stage	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. It is important NOT TO USE ANY NUMBERS OR PUNCTUATION in this field as this causes problems in our systems. Please only use words. For example, 1st Winter should be entered as 'First Winter' and 2nd Instar as 'Second Instar'.
Record type (method)	This is basically how you recorded it. 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. 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'.
Comments	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.

The template format looks like this:

You can download the template from [location]

1. Populate the spreadsheet table with your data ready to be imported ensuring you follow the rules set out above.

> Import files may only have a maximum of 2,000 records (rows of data). If necessary, split your data into separate files.

2. Once completed, give the sheet a descriptive name and Save as type: "**CSV (Comma delimited)**". This is the file format the Swift system will accept for import.

4 STARTING YOUR FILE IMPORT

1. Go to the RECORD website and Log in (see the 'Getting Started with RECORD Swift' Guide for more details)

2. Click on "Menu" button and select MY FILES
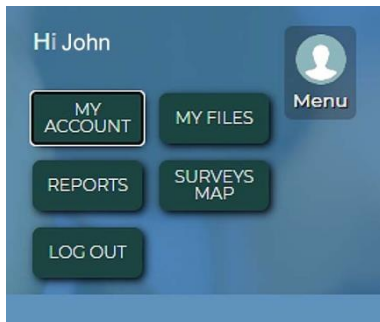
3. This opens up the **My record files** page. Under **Create a new file**, choose "Record Import Wizard 1.0" from the "Type of File" drop down menu.

4. Under "File name", give your file a descriptive name file name (this will usually be the same as the sheet to be imported).

5. Click 'create new file'

6.

5 USING THE RECORDS IMPORT WIZARD

The **Records import wizard** will guide you through the process to be followed.

5.1 UPLOAD YOUR CSV FILE

Click 'choose' file and navigate to your prepared file.

> ℹ An alternative process is to paste your records. This must include data headers as outlined above and records data in the same order as the headings. Unless you are familiar with using this method, it is recommended that you import using a CSV file created in a spreadsheet application like Excel.

5.2 COLUMN MATCHING

When you have uploaded your file, the Import Wizard will perform **Column matching** to check that your file data matches the values expected in the columns (fields) (see **Preparing your data** above). If any columns have not been matched, you just need to select a match, or skip the column. Essential fields will use a default if skipped. Click 'confirm matching' when you are happy.

2. Column matching

Check that all of the columns have been matched correctly below and make any changes as required. You can select [skip this column] against any of the optional columns.

We recommended matching the taxon column to your scientific names or BTO 2 letter codes if you have them. Common names can be used but the matching process will likely involve more manual matching effort. For instance 'Redshank' is a bird, a flower and a moss.

Our column	Your column	Default (if skipped)
Observers*	Recorder	
Determiner	Determiner	Use observers
Date*	Date	
Location	Location	
Spatial reference*	Grid-Ref	
Taxon (Species)*	Scientific or Common	
Count	Count	Present
Sex, Stage or Status	Sex Stage	Not recorded
Record type (method)	Method	Field record
Comments	Comments	
Sensitive (y or n)	[skip this column]	n
External record id	[skip this column]	

CONFIRM MATCHING

ℹ The column name "Sensitive" should be set to be skipped unless any records are classed as sensitive data e.g. Badger sett locations. See the *NBN Sensitive Data List* for more details.

5.3 General assessment

The Import Wizard will next perform a **General assessment** to check for any errors which may affect the import and will issue warnings and tips to be addressed if necessary.

- **Red progress bars** indicate that we found errors in some of your records. Erroneous rows will be excluded from this import. Full details will be provided in the text area below. You'll also be able to download a file of excluded records at the end of this import process. You can then address the errors in the excluded file and re-import this as a separate file. Alternatively, you can address the errors in your original data and start the import process again if you want to keep all the records in 1 file.
- **Amber progress bars** highlight that there are warnings and tips for you to review. The import wizard will still import these records. However, you need to be aware that some values may have been shortened to ensure they will import into our database. We strongly urge you to check all warning messages prior to proceeding past this step. Take a note of any errors and continue the import, you can then address these errors at the end of the process. Alternatively address the errors in the original data and start again as above.

3. General assessment

Assessing 88 records.

Tests	Progress
Observers	100%
Determiners	100%
Dates	100%
Locations	100%
Spatial references	100%
Taxa	100%
Abundances	100%
Sex and/or Stage	100%
Record types	100%
Comments	100%
Sensitive flags	100%
External record ids	100%

Red progress bars indicate that we found errors in some of your records. Erroneous rows will be excluded from this import. Full details will be provided in the text area below. You'll also be able to download a file of excluded records at the end of this import process.

Amber progress bars highlight that there are warnings and tips for you to review. The import wizard will still import these records. However you need to be aware that some values may have been shortened to ensure they will import into our database. We strongly urge you to check all warning messages prior to proceeding past this step.

Once the import process has completed you will have the opportunity to review and edit your records, via the general records form, prior to finalising this file. You can abort or restart this process at any time by closing or refreshing this page.

Errors, warnings & tips

ERROR ROW 71 Invalid determiner, ""
ERROR ROW 81 Invalid determiner, ""
TIP ROW 6 If possible use a more accurate grid reference than 1000sqm accuracy

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In this example the following text is displayed in the 'errors, warning & tips' box:

ERROR   ROW 71   Invalid determiner, ""

The **Error** in the above example occurs because the determiner

ERROR   ROW 81   Invalid determiner, ""

TIP   ROW 6   If possible use a more accurate grid reference than 1000sqm accuracy

ROW number refers to the row in the original document

A common **Warning/Tip** may be related to Spatial references and can occur if eg. A 4-figure grid ref is entered. The warning will state that a Vague grid reference has been entered for one or more rows of your data. You will see that it gives you the 'tip' to provide a more accurate grid reference if possible. However, if a more accurate grid reference isn't known, a vaguer one is acceptable.

The records summary shows what you have imported (minus species which are addressed in the next section). All that is required is for you to check the information is correct.

It's worth noting that the General Assessment is not a substitute for checking the records yourself. It will only pick up common/major problems. It will not, for example, tell you if you have entered a record type into the sex/stage column or pick up on any problem characters such as commas which shouldn't be in there (see section 3). It is therefore really important to check the data yourself before importing it.

5.4 SPECIES MATCHING

The wizard then attempts to match each scientific/common name in your file to an existing species (or taxon) already in our local species dictionary. If a species has been recorded more than once within your data (e.g. a blue tit recorded at 2 different locations) then it will only appear here once. Check each entry and edit any errors. For example:

Your value	Matched to	Edit
Arion ater	Large Black Slug Arion (Arion) ater (Species) MOLLUSC	✏
Black headed gull	Black-headed Gull Chroicocephalus ridibundus (Species) BIRD	✏
Blackbird	Blackbird Turdus merula (Species) BIRD	✏
Blue tit	Blue Tit Cyanistes caeruleus (Species) BIRD	✏

In these cases, the species' have been matched perfectly or with a very minor change. You can see for black-headed gull that a '-' has been added for example.

Carrion crow	▲ Multiple matches found	✏

In this case multiple matches have been found. Click the pencil to edit and start typing 'carrion crow'. You will see that this is the common name for both a species and sub-species. Pick the correct one. This could also happen if the same common name applies to more than one species.

Dunock	▲ No exact match found	✏

No match is found because the common name is misspelled. Search for the correct spelling as above.

Migrant hoverfly	▲ No exact match found	✏

Select a match OR exclude all records for Migrant hoverfly

migrant hoverfly ✕

EXCLUDE THESE RECORDS

If it isn't obvious what's wrong and a match can't be found in the search bar, you will need to look at other websites for alternative common names or a scientific name. In this case 'Migrant hoverfly' is a name for the species '*Eupeodes corollae*' but is not in the dictionary as it isn't commonly used. Use the [NBN Atlas Species Search](#) (preferred – use the 'names' tab to see alternate scientific and common names, the 'accepted' or 'preferred' name from this website should always work in Swift), the [NHM UK Species Inventory](#) or a general online search, e.g. Google. Another common error may be misspelled or outdated scientific names, which can also be investigated in the same way. Scientific names do sometimes change but old names are listed on NBN.

For some species, you may be unable to find a matching species which you can be certain is correct. For example, there is more than one woodlouse with 'common' in its name so you can't be sure; and various different invertebrates are referred to as 'Daddy long legs'. If it is your own data you may be able to confirm the ID through memory/photos, but if there is uncertainty, the best thing to do is to click edit, then 'Exclude these records'. They can always be entered later if needed.

Once all species have been matched, click 'Proceed'.

5.5 ATTEMPT IMPORT

The final check is **Duplicate prevention** to look for any duplicate records that are already in the database or are repeated in the file you are importing. You will see a message telling you if any records have been excluded:


This total includes records you have chosen to exclude during species matching AND any records which are duplicates (already in the system or repeated within your data).

A duplicate record is one that matches another record in each of these fields:

- Taxon *and*
- Date *and*
- Grid reference *and*
- Abundance *and*
- Sex and/or stage *and*
- Record type

Click 'ok' on the message. You will then have the option to download excluded records (if there are any) and view imported records. **Click download excluded records first** and you will download an excel file of all records that have not been imported.

Then click 'view imported records'
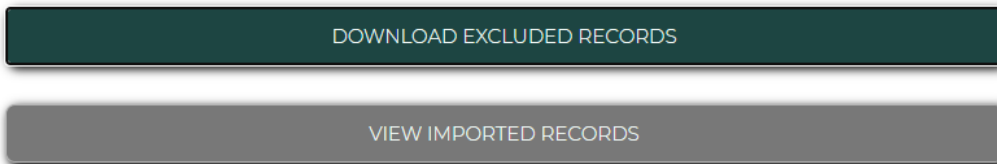
'View imported records' will take you to a version of the general records form.

Scroll down and you will see the records that have successfully been imported in the table.

You now have the chance to edit any of these records before they are finalised and submitted. Click the pencil to edit, paper clip to add attachments and bin to remove the record (see 'Getting started with RECORD swift' guide for more info. You can also add any records using the general records form.

Once you are happy, click 'Finalise file' to finish the import process and submit your records. By finalising your file, you are agreeing to our terms of use.