

# British Arachnological Society Atlas

## Guide to Bulk Upload of Records

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This guide has been produced to support recorders with the submission of large numbers of records at once using the iRecord platform and a newly designed data capture spreadsheet. If you only have a few records to add to the recording scheme you might instead prefer to submit them using our online form: <https://irecord.org.uk/enter-srs-records>

The iRecord website can be found by following this link: <https://irecord.org.uk/>

In order to submit any records via the iRecord platform you must first create a user account. This can be done quickly and for free by selecting “**Create new account**” on the homepage of the above website. Alternatively, you can add your records to the below spreadsheet and send it to National Organiser for upload on your behalf.

The newly designed data capture spreadsheet can be found here: [BAS iRecord bulk upload spreadsheet](#)

The spreadsheet has been designed to capture all the vital data that is required to create a biological record and align the data for upload with iRecord and the **BAS Atlas**. It also has optional fields for the input of non-critical record data that can be collected to support the BAS in understanding the ecology of the species.

A description of the data fields and their importance is provided in the table below. Those marked as **Critical** *must* be completed in order to create a valid record. Those marked as **Not critical – important** or **Not critical**, do not need to be completed to create a record, but any data for these attributes is extremely valuable to help future analysis and understanding of the species.

<b>Column Heading</b>	<b>Description</b>	<b>Importance</b>
Species	The name of the species – defined in dropdown box choice [scientific name]	Critical
Stage	The stage of the animal in its lifecycle – defined in dropdown box choice	Not critical - important
Sex	The sex of the animal– defined in dropdown box choice	Not critical - important
Abundance	How many individuals are being recorded	Not critical - important
Date from*	The start date of the record	Critical
Date to*	The end date of the record	Critical
Date type*	The date type of the record – defined in dropdown box choice	Critical
Grid reference	British National Grid location of the record	Critical
Vice county	The vice county that the record is located in – defined in dropdown box choice	Not critical
SRS Altitude	The altitude in metres of the record	Not critical
Site name	The name of the site that the record is located in	Critical
Comment	A free text cell to put any additional information	Not critical
Recorder name	The name of the person that found the species	Critical
Identified by	The name of the person that identified the species	Not critical - important
SRS Broad habitat	The type of habitat that the species was found in – defined in dropdown box choice	Not critical - important
SRS Sub-habitat	The sub-habitat that the species was found in– defined in dropdown box choice	Not critical
SRS Substrate	The soil type of the site– defined in dropdown box choice	Not critical
SRS Hydrology	The hydrology of the site– defined in dropdown box choice	Not critical
SRS Management feature	The type of habitat management being undertaken at the site– defined in dropdown box choice	Not critical

SRS Grazing	The type of livestock grazing being carried out at the site– defined in dropdown box choice	Not critical
SRS Management frequency	The frequency of habitat management being carried out at the site– defined in dropdown box choice	Not critical
SRS Habitat detail or Method	The survey method that was used to find the species– defined in dropdown box choice	Not critical - important
SRS Vegetation structure	The height at which the species was found– defined in dropdown box choice	Not critical
SRS Sampling duration (minutes)	The duration of the sampling in minutes	Not critical
PD	This will auto-populate if the sheet detects that the record is duplicated [you can then decide to remove one of the records]	Don't import

**\*Date columns** – most records will usually be a single date, rather than a date range. If this is the case, enter the date of the record in both the “date from” and “date to” columns. For the “date type” column, selecting “D” will confirm that you are creating a single date record, selecting “DD” will confirm that you are creating a date range record. Regardless of Date Type you will still need to populate both “date from” and “date to” with dates, even if it is the same date for a single day.

There are other **Date Types codes** available:

D = dd/mm/yyyy (single day)  
DD = dd-dd/mm/yyyy (date range)  
O = mm/yyyy (single month)  
OO = mm-mm/yyyy (month range)  
Y = yyyy (single year)  
YY = yyyy-yyyy (year range).

### Before uploading the completed spreadsheet to iRecord

Before uploading the spreadsheet to iRecord, it is advisable to switch you account to **Training Mode**. This will allow you to practise the process of uploading the data without submitting any records to the main platform and the BAS Atlas. Records that you do upload in this way are saved as your training records that only you can view, and only when you switch to training mode. They can be edited and deleted in exactly the same way as normal records as and when you choose, without interfering with the main population of records.

In order to enter training mode on iRecord:

Enter the site and log on to your account > click on “My account” at the top left of the page> select the “Edit” tab under your name > scroll down and tick the box for “Training Mode” > scroll down to the bottom of the page and click the save button

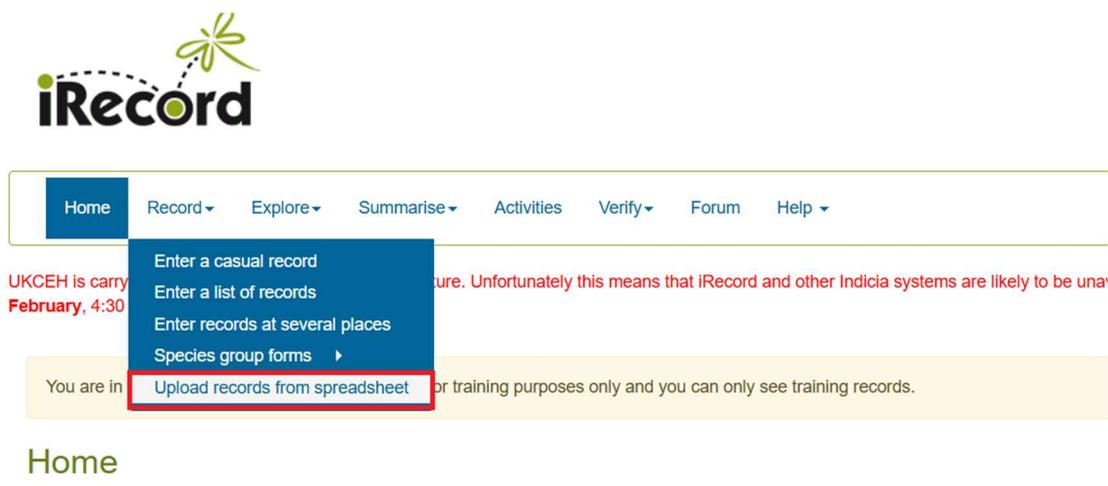
Once you have done that, the page will reload and you will see a banner across the site informing you that you are in training mode. You can then practise uploading data without the worry of adding any records in error.

You are in training mode. Records you add will be for training purposes only and you can only see training records.

You can exit training mode by logging back into “My account”, unchecking the “Training mode” box and then clicking save. This will return you to you account back in normal iRecord mode, ready to upload records to the main platform.

## Using the iRecord Bulk Upload System

On the iRecord home page, select the “Record” tab and in the drop-down menu select “Upload records from spreadsheet”.



The screenshot shows the iRecord website interface. At the top left is the iRecord logo, which includes a stylized green insect icon above the text 'iRecord'. Below the logo is a navigation bar with several tabs: 'Home', 'Record', 'Explore', 'Summarise', 'Activities', 'Verify', 'Forum', and 'Help'. The 'Record' tab is selected, and a dropdown menu is open, listing several options: 'Enter a casual record', 'Enter a list of records', 'Enter records at several places', 'Species group forms', and 'Upload records from spreadsheet'. The 'Upload records from spreadsheet' option is highlighted with a red rectangular box. Below the navigation bar, there is a yellow banner with the text 'You are in training mode. Records you add will be for training purposes only and you can only see training records.' To the left of the banner, there is a red text notification: 'UKCEH is carry February, 4:30'. Below the banner, the word 'Home' is displayed in green text.

You’ll then be met with the below screen where you can either browse and select your record spreadsheet or drag the file and drop it into the indicated box. Once imported, click the “Next step” button at the bottom of the page.



You are in training mode. Records you add will be for training purposes only and you can only see training records.

Home / Import (new version)

## Import (new version)

Upload a file to import

This is a new version of the importer at August 2024. Please read the information on our [Help page](#). If you wish to go back to the older importer it can be a

Choose a \*.xls, \*.xlsx or \*.csv file containing the data you would like to import then click Next step.

Browse files

Select a CSV or Excel file or drag it over this area. The file can optionally be a zip archive. If importing an Excel file, only the first worksheet will be imported. The maximum size of an individual file you can upload is 100 MB.

Next step

Once your spreadsheet is loaded, you will be taken to a screen to select the main options for the records. It is **important** that you first click “**show preferred options**”, which will change the top drop-down menu to allow you to select the correct survey data set. The correct selections for the drop-down menus here are “**Spider Recording Scheme**”, “**British National Grid**”, “**UK Master List**” and “**Other Method (add comment)**” as indicated below. The fourth menu is to select the sampling method for the records but, where applicable, this will be defined for each record within your dataset. Once completed, click “Next step” at the bottom of the page.

### Import (new version)

#### Import settings

Select options for importing records. These options will be applied to all records in the import file.

#### Survey dataset (unrestricted):

Spider Recording Scheme

Select the survey dataset to import records into. We recommend using "iRecord Import" for all records, unless you have a good reason not to (e.g. for dragonfly records following BDS guidance). Showing all available options.

Show preferred options

#### Spatial ref. system:

British National Grid

Select the spatial reference system used in this import file. Note, if you have an import file with a mix of spatial reference systems then you need to include a column in the file that shows the spatial reference system code, so that this can be mapped to the Sample Spatial Reference System field on the next page. Currently only showing preferred options. Show all options

#### Species list:

UK Master List

Select the species checklist which will be used when attempting to match species names. We recommend using the UK Master List for all imports. Currently only showing preferred options. Show all options

#### Sample Method:

Other method (add comment)

Select the sample method used for records in this import file. Note, if you have a file with a mix of sample methods then you need a column in the import file which is mapped to the Sample Sample Method field, containing the sample method.

Background processing done

More info...

Next step

Privacy settings

After clicking next step, you'll be taken to a page which lists the imported column titles - you will need to select the matching attribute that you want your data to be displayed as within each record. These are selected in the drop-down menus next to each inputted column heading. Where you have not added data under any of the non-critical column headings in the spreadsheet, you simply need to select “not imported” on this page in the corresponding drop-down menu. This tells the programme that you don't wish to have this attribute displayed on the final record.

See below for an example of the layout and the options that you will need to select for the critical data, and also some examples of the non-critical but important data.

## Import (new version)

Map import columns to destination database fields

Select which database field each of your import file's columns should be mapped to. Any columns in your file that do not need to be imported, or that have no matches, should be set to "- not imported -".

By default this page shows all the "standard" attributes that will be sufficient for typical biological record formats. If needed you can add "advanced" attributes to the list - these provide additional options but are not always straightforward to use. Contact iRecord if you need further information on these.

Display  standard fields  standard and advanced fields

Column in import file	Destination database field
Group	- not imported -
Family	- not imported -
Status	- not imported -
IUCN	- not imported -
Species	Species or taxon name
Stage	Stage
Sex	Sex
Abundance	Abundance

[Privacy settings](#)

### Required fields

The following database fields are required for the selected survey dataset. Please ensure they are all mapped to columns in your import file before proceeding.

- Species or taxon name
- Stage
- Date
- Spatial reference

You have selected a mapping for the following field(s):  
Date type  
In order to complete the group of related fields, please also map the following:  
Date end  
Date start

Date from	Date
Date to	Date
Date type	Date type
Grid reference	Spatial reference
Vice county	Vice county
SRS Altitude	- not imported -
Site name	Location name
Comment	Sample comment
Suggestions: <span>Occurrence - Occurrence comment</span> <span>Sample - Sample comment</span>	
Recorder name	Recorder name
Identified by	Identified by
SRS Broad habitat	Srs broad habitat
SRS Sub-habitat	- not imported -
SRS Substrate	- not imported -

SRS Hydrology	- not imported -
SRS Management feature	- not imported -
SRS Grazing	- not imported -
SRS Management frequency	- not imported -
SRS Habitat detail or Method	Srs habitat detail or method
SRS Vegetation structure	Srs vegetation structure
SRS Sampling duration (minutes)	- not imported -
Dup check	- not imported -
PD	- not imported -

[Next step](#)

Once you have finished matching your data with the record attributes, click “**Next step**”. Where some taxa in your data may have synonyms in the database, the next screen will ask you to select the name that you wish to use for those species.

### Import (new version)

#### Value matching

For data values that need to be mapped to an exact term (e.g. a species name, or a term from a list of options), the importer will automatically match the imported term to the equivalent in the database where possible. If an exact match cannot be found, then once the background processing is complete a form will appear below which will allow you to search for or select the correct value to use from the database for each unmatched term or species name. Data values found in your import file which don't exactly match one of the available options in the database, or values that match multiple potential options in the database, are listed in the column on the left and the terms you can select from for each value are in the column on the right. You must match all the values and save them before proceeding with the import.

List of values to match for Species column

Data value	Matches to species or taxon name
<b>Micaria micans</b>	<input type="text" value="Type the start of a species or taxon name to search"/>
Several possible matches were found for Species. Click on the panel below to select the correct match, or search for a match using the search box above.	
<p><b>Micaria micans</b> [Syn. of <i>Micaria pullicaria sens. lat.</i> (Sundevall, 1831)] spider (Araneae)   Species</p>	<p><b>Micaria micans (Blackwall, 1858)</b> spider (Araneae)   Species</p>
Once you have specified the taxa that you wish to use when matching values from the "Species" column, click the button below to apply the matched terms to the current import.	
<a href="#">Apply matches</a>	

When you have selected the correct form name for each taxon, click “**Apply matches**” and then “**Next step**”. You will then be taken to an overview of the data that you will be importing. It lists the import file type, number of records for import and your chosen attributes for the records, as shown below.

## Import (new version)

### Import summary

Here is a summary of the import that will be carried out. Please check the settings – if anything needs changing you can go back to previous steps in the import process. Once you are happy that the details are correct scroll down and click “Start importing records”.

<b>File type</b>	xlsx
<b>Number of records</b>	33

Column mappings	
Import column	Database field
Group	■
Family	■
Status	■
IUCN	■
Species	☰ Occurrence species or taxon name
Stage	☰ Occurrence attributes stage
Sex	☰ Occurrence attributes sex
Abundance	▶ Occurrence attributes abundance
Date from	▶ <a href="#">Privacy settings</a> <sup>e</sup>

After you have reviewed this page and are satisfied with the summary, click “**Start importing records**” at the bottom of the page. This will then upload the dataset to the system. As part of this process, iRecord will check the data for errors against set parameters for each of the attributes. If everything is correct, the records will be uploaded. **It can take up to 15 minutes for imported records to appear on the iRecord platform** and, once displayed, you can view them and double check everything is correct. If there are any issues detected, the platform will create a report for you to download that will detail where the errors are in the spreadsheet and inform you that **no records have been uploaded**. This will give you the opportunity to review and change the dataset as necessary and re-upload the data once correct.

## Import (new version)

### Checking data

Import details

Checking the import data for validation errors...

33 of 33 rows checked, 2 rows with errors found.

Checking complete

[Import another file](#)

Errors were found in 2 rows. Because validation errors were found, no data has been imported. Please download the errors spreadsheet using the button below and correct the data in your original file accordingly, then upload it again. 

[Download the rows that had errors](#)

From here, you can continue to upload further data or go straight into looking at your records and new dots on the map!

**Note that records from a large import can take a while to appear on the iRecord “Explore > My Records” page. Don’t be tempted to re-import them if they don’t appear immediately, as it often takes a while for the system to display them.**