



## Guide to the BirdTrack Upload Tool

BirdTrack offers three easy ways to log your sightings: an app for Android and iOS devices, an online data entry form and a bulk upload tool. While the app and online form are handy options for in-field recording or adding several recently collected lists, the bulk upload tool is ideal for larger datasets, such as historical records. Uploads are carried out using spreadsheets that can be in a number of formats, and the tool has been designed to be as intuitive as possible to use. This guide explains how to use the upload tool.

### Getting started

The upload spreadsheet can be uploaded in one of three file formats:

- Microsoft Excel 2007-16 (.xlsx)
- Microsoft Excel 97-03 (.xls)
- Comma Separated Value (.csv)

It is not necessary to use Microsoft Excel software, as free Office programmes such as LibreOffice will allow spreadsheets to be saved in the accepted formats.

As a maximum, a single upload spreadsheet can contain around 65,000 rows. However, spreadsheets with this number of records would take a very long time to process by the system. Users wishing to upload more than c15,000 records per spreadsheet should contact the BirdTrack team for further guidance.

### Spreadsheet layout

In the spreadsheet, data is entered in rows below standard column headers. Several column headers are required for the upload to be successful:

- Species
- Date
- Place
- Grid Reference or Latitude and Longitude information

There are also many more optional column headers which are listed below. Note that some fields may only contain specific characters, while others are text fields that can contain up to 1,000

characters. These columns are explained in more detail in the 'Guide to Column headers', and you can download a sample spreadsheet on the help pages.

Table 1: List of all column headers that can be used in the bulk upload spreadsheet

Column Header	Category	Notes
Species	Required	
Date	Required	Please use only a precise date for sightings.
Place	Required	Please use a descriptive name for the location you recorded your sightings.
Grid Reference	Required	The upload tool will recognise two figure, tetrad and four figure grid references.
Latitude/Longitude	Required	Should be instead of Grid Reference for locations outside of Britain and Ireland.
Count	Optional	Please use only whole numbers, 'c' or '+'. 
Start Time	Optional	
End Time	Optional	
Complete list	Optional	Please use 'Y' to indicate if the records form a complete list.
Visit comments	Optional	A text field for entering comments on visits.
Weather comment	Optional	A text field for entering weather notes.
Count type	Optional	Field used for indicating a particular type of recording. See the detailed guide for more instructions.
Observation comment	Optional	A text field for entering comments for a particular sighting.
Remarkable	Optional	Please enter 'Y' to indicate if a sighting should be noted as 'Remarkable'.
Sensitive	Optional	Please enter 'Y' to indicate if a sighting should be noted as 'Sensitive'.
Habitat	Optional	A text field for entering notes on habitat for a particular sighting.
Breeding evidence	Optional	Field used to indicate the level of breeding evidence noted. See the detailed guide for more instructions.
Breeding details	Optional	Field used to add counts to breeding evidence
Flight	Optional	Field used to indicate flight direction and counts. See the detailed guide for more instructions.
Pinpoint	Optional	Field used to add pinpoint sightings, counts and comments to sightings. See the detailed guide for more instructions.
Activity	Optional	Field used to indicate activities (for example 'Feeding', 'Roosting', etc.). See the detailed guide for more instructions.
Age and Plumage	Optional	Field used to indicate age, plumage and sex for a particular record. See the detailed guide for more instructions.
Source	Optional (Requires permission)	See the detailed guide for more instructions.
Observer	Optional (Requires permission)	See the detailed guide for more instructions.

## Other taxa

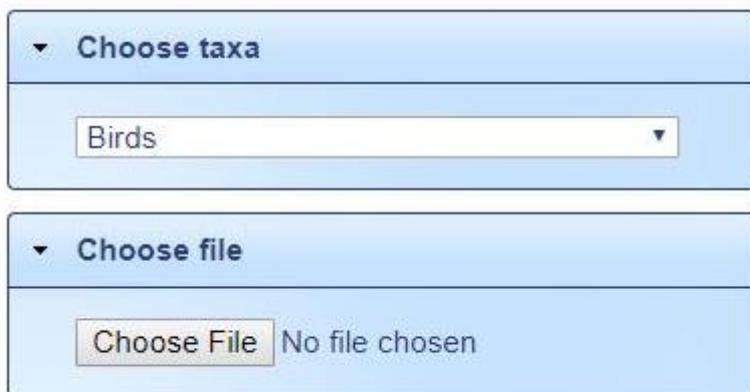
Currently, the bulk upload tool supports bird and mammal records. The only difference with the latter is that several of the Optional column headers are not available. One point to be aware of is that mammal records will need to be uploaded in a separate spreadsheet to bird sightings.

## Uploading your sightings

Once you have set up your spreadsheet and entered all the relevant data, the last step is to upload your sightings. Log in through the global portal in BirdTrack and then click on 'Upload records' in the menu on the left hand side.

### (1) Set-up page

The first page of the upload tool presents you with three options that need to be chosen with care.



The screenshot shows two sections of the upload tool setup page. The first section, titled 'Choose taxa', has a dropdown menu with 'Birds' selected. The second section, titled 'Choose file', has a 'Choose File' button and the text 'No file chosen'.

Choose taxa: This is always preset to birds, but you will need to change this if you are uploading sightings from a different taxonomic group.

Choose file: The final step on this page is to choose the spreadsheet you want to upload. Click on 'Browse' and then go to the file location in the pop-up window.

Once you have carried out these steps, click 'Next'.

### (2) Header matching

The first step the upload tool will carry out is to match the headers in your spreadsheet with those recognised by BirdTrack. If there are any unrecognised headers, a dropdown menu will be displayed from which you can select the most appropriate option. If all the headers match, this page will not be shown.

## Upload records - match unmatched columns to data fields

Column name in upload	Target data field
PLACES	PLACE

### (3) Site matching

Once you have clicked 'Next', the upload tool will scan the sheet and try to match the sites entered in the 'Place' column of the spreadsheet with existing locations in your account.

## Upload records - match user places

Place name in upload	Place to use
Minsmere	Create new place

For sites which do not yet exist in your account, the default option is create a new site using the details in the 'Gridref' or 'Lat/Long' columns. You also have the option of selecting to 'Ignore records for this place' or to select one of your previously created places to match it. Once you have indicated what you want to do with any unmatched places click on 'Next'.

### (4) Species matching

If there are errors or unrecognised species, the upload tool will show this screen:

## Upload records - unrecognised species in file

Unrecognised species	Choose species
Greenfinches	Greenfinch

Simply type in the correct common or scientific name in the box on the right and select the correct entry from the auto-generated list to correct the mistake. Note that if all species names are recognised, the upload tool will not display this page. Once completed, click on 'Next'.

## (5) Other errors

If there are any errors in any of the columns, such as duplicate records (same species, date, location and time, if given) or incorrect formatting of breeding evidence, they will be highlighted on this page. You will have to manually edit these errors in the original spreadsheet and restart the upload process.

## (6) Points to check

On the final upload page, the upload tool will generate a list of sightings that break automatic thresholds for national rarities, local rarities, out-of-season records or high counts. Please check these carefully in case there are any errors.

Points to check

Date	Place	Species	Message
13/03/2015	England - Suffolk - Minsmere RSPB	Oriental Pratincole - <i>Glareola maldivarum</i>	Seldom-recorded species in this area, please double-check

## (7) Confirm submissions

Finally, the upload tool will generate a summary of the number of lists, places, species and total records that are being uploaded. Please check these carefully in case of errors. Clicking submit will upload the spreadsheet and end the upload process.

## Upload records - confirm submissions

### Summary of upload data

Number of lists:	1
Number of places:	1 (0 new)
Number of species:	2
Total records:	2

## Troubleshooting

For large datasets, it may be an idea to forward a copy of the spreadsheet to the BirdTrack team to check for any issues.

If you encounter any issues during the upload process, please don't hesitate to get in touch with the BirdTrack team. Please do forward a copy of the spreadsheet you are uploading in any correspondence.

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