

The following guidance was developed, and thoroughly tried and tested by the BSBI. It was developed to help those digitising both recent and historical datasets. Although specifically written for MapMate the same principles apply to other programmes.

Taxon

- Ensure MapMate is fully up to date with patches. Its Species Dictionary follows Stace 3 reasonably closely. You may have to research synonyms to find the currently accepted name in the Species Dictionary.
- When you enter records, there may a few for which there is no direct equivalent in MapMate's Species Dictionary. Compile a list of these taxa and records, and take them up with BSBI staff who will arrange to update the Species Dictionary via a MapMate patch.
- Consult Referees on specimens and records of critical species, such as *Hieracium* and *Taraxacum*, before inputting - especially important with old or historical records, even by reputable recorders, as there has been extensive revision of the taxonomy and our understanding of it in some of these critical groups in recent decades.

Quantity

- Enter population number or just "p" to indicate "Present" in MapMate.
- For abundance, other than an exact number ("rare", "scarce", "widespread" etc), enter into Comment field.
- Use DAFOR where it has been assessed in the grid square that the grid ref describes. For example, if there is only one small bluebell wood in a tetrad then you might record bluebell as Rare. However, if you record the bluebell with a 10-figure grid reference then you might record it as abundant, even though it is the same group of bluebells.
- It is good practice to qualify counts with descriptions such as *rosettes*, *spikes*, *clumps*, etc. If the quantity is followed by an exclamation mark and a qualifier in the Quantity field, e.g. 10!clumps, "clumps" will automatically appear in the Comments field.

Stage

- Only enter "Not recorded" if not recorded of course! If the card says *seedling*, *juvenile*, *mature*, *flowering*, *fruiting* or *vegetative*, etc then it is useful to enter that.

Sites

- **Always** use a site name and a grid reference (grid ref). This may allow errors to be identified and also allows querying to search for occurrences of those site names.
- A quick way to enter new sites in MapMate is to use the format "sitename@gridref" in the Site field.
- However, if you use this quick way of entering sites, watch out if the site is near the VC boundary. MapMate occasionally allocates the site to the wrong VC. Partly because the base map that MM uses was digitised at a crude scale (1:200k), and the boundary can be 2 - 300 metres out. Also, because for tetrad or 1km grid refs, if the centre of the square is outside the VC boundary MM tends to allocate the site to the other VC.

- Use the most appropriate grid ref which (just) encompasses the site, e.g. a 6-figure grid ref describes a 100 metre square or a 4 figure grid ref a 1km square, etc, rather than central approximations of much larger sites (centroids).
- But remember that site names are really only a check that the grid ref is correct – they should be *simple* and not precise address-like descriptions. Best use the closest and most relevant name on a 1:50,000 (or better) map.
- With rivers & road numbers, put a place name first then river or road, e.g. *Aberfeldy, River Tay* or *Crianlarich, A82*.
- Always begin with the site name, followed by any *simple proximity* descriptors, using consistent formats. Then put other location information in Comments field. For example, if you had noted “Rocks near shore, S of Kilmarie” on your recording card, you could enter “Kilmarie, S of” as the Site Name, and put “Rocks nr shore” in the Comments.
- If your site name actually refers to a 1km or 2km square, rather than a particular place in those squares, then you could include “1km square” or “2km square” after your site name. Enter in the usual way. E.g. in MapMate “Kilmadog (1km sq)@AB2367”.
- Use your standard naming system and set of abbreviations consistently. Avoid using any ambiguous or non-standard abbreviations.
- Although duplicate sites are not a serious problem as there is no limit to the number of sites you can create in MapMate, they are best avoided for tidiness. You should minimise the number of duplicate sites by checking to see if the site already exists. Enter its grid ref into the Site field, *enter* and use any suitable (pre-existing) site listed.
- For newly recorded occurrences use the most precise grid ref possible – if you know the precise location then don’t just approximate to the nearest tetrad or monad. Conversely, for imprecise data from other people then don’t try to make the record more precise than the information supplied by the recorder.
- When digitising third party records which have grid references but no site names, and you have *no idea* where the site was, don’t retrospectively add a site name, as this may give false validity to any grid-reference errors.
- However, it’s important not to try to second guess the site details when entering someone else’s, perhaps old, data. If in doubt, create a new site. You can still query records for sites based on part of a site name, or for a 1km square, tetrad or hectad, or within an irregular polygon drawn on screen.
- Be cautious when editing site names of existing data, just for the sake of consistency and neatness (unless spelling is obviously wrong, for example). Such ‘tidying up’ site names can inadvertently lead to a loss of valuable information, or even completely change the original meaning.
- **Habitat information:** If the entire site (100m square, monad, tetrad etc) has uniform habitat cover then details can be included in the Site details, otherwise best to include as a comment.

Date

- **Normally** the exact date will be given and **should** be entered in full.
- **Only where exact dates not given:** use as narrow as possible date ranges, which should ideally avoid spanning BSBI date-classes. (You can't enter "before 1950" or "after 1970" etc. and must use date ranges).
- Take care not to enter 2 digit years in MapMate, like "95" as this converts to 2095!

Status (e.g. *Native*, *Alien*, *Planted*, *Established*, *Surviving*, *Casual*, etc.)

- If you use Status to record whether a species is *Native* (as opposed to *Alien*) then it should be applied at the level of the record, not the national or regional status of the taxon.
- There is no need to record status when recording a native occurrence of a species in an area it is by default native. However, status should be recorded for a native species where it is known to have been introduced. In most cases *Planted* will be the most appropriate category.
- If the status of a species is in doubt in an area where it is by default native then use '*Unknown*', otherwise the default should be '*Not recorded*'.
- For non-natives, it may be sometimes possible to record whether a species has been deliberately introduced (*Planted*) and the extent to which a species is established (*casual*, *surviving*, *established*) although these categories are poorly defined and often difficult to apply in practice.

Recorders

- We used to recommend that surnames were followed by initials in line with BRC guidance (e.g. Long, M.P.). However, due to a proliferation of similar names, we now recommend that all new names include full forenames. (Long, Maria P.).
- However, there is a lot to be said for using the same approach consistently. So, if you have been using the "Surname, initials" format for years, you may wish to continue with that format – even for 'new' names. But make sure that whenever you enter a new recorder name for the first time, you spell it correctly, use ALL the recorder's initials and get all the full-stops, spaces and commas in the right place and right order!
- Always use precisely the same recorder name spelling and format when entering subsequent records by them, singly or in combination with others.
- Don't include titles unless omission would cause offence or is necessary to distinguish.
- Enter each name in full, e.g. 'Smith, Peter & Smith, Mary' rather than 'Peter & Mary Smith' or 'Smith, Peter & Mary'.
- Only use abbreviations for organisations where these are nationally recognisable (i.e. 'BSBI' or 'RSPB' would be fine, 'DBC' isn't.)
- When entering new recorders' details in MapMate, enter location "unknown" and no comment.
- If the VC Recorder is in a group of recording botanists, enter their name first, then others. With large parties, it's always best to have a named botanist as well as a group

e.g. “McIntosh, James W.; BSBI field meeting”. Alternatively, ‘*et al.*’ can be used to acknowledge a large group (of more than four).

Determiner

- Use same naming convention as recommended above.
- If no determiner is given, assume determiner = recorder. If the “recorder” was a large group, then use the person who compiled the list as the determiner, as they had the final word on the inclusion of any species.

Method

- Generally, “Field Record/Observation” but if appropriate use “Published Record” or “Voucher Specimen (Herbarium Code)”.
- If the standard Herbarium Code isn’t already in your Method list, you can add additional herbarium codes.
- It is also possible to add other Methods e.g. *Pers. Comm.*, *Individual Record Card*.

Reference

- Enter a reference code or name which will correspond uniquely with the source of the paper record. E.g. Your name, 2014 Field Cards.
- Enter any information about the source of the published record.
- If you import records ALWAYS to go back and amend the automatically generated reference to something more meaningful – like the source of these third-party records.

Comments

- Generally you **should not** include information that is more appropriately (and normally) included in other fields. Otherwise the ability to analyze using those fields will be lost.
- In particular, grid references **should not** be included in the Comments field – they should be entered with the Site name in the Site field, otherwise the ability to map and query using those (full) grid references will be lost.
- Perhaps the only exception might be when a linear population is given two grid references on a recording card – one at either end.
- Don’t include place names and proximity descriptors – they should go in the Site Field, but all other location information that you have not already entered in the Site Field should be entered here (e.g. “On rocks nr shore”, or “Alt 650m”).
- You may wish to use the Comments field to qualify or add to the information given in the “Quantity” field – e.g. 10 tufts, 6 patches, or 4 flowering spikes, etc.
- **Habitat information:** If the entire site (e.g. 1km square or tetrad) doesn’t have uniform habitat cover then best to put habitat information from in Comments field.

- If you consider the record to be sensitive¹, note the word “SENSITIVE”, along with the reason why in the Comments field of the records.
- Avoid using obscure abbreviations or codes in comments.

Data Validation

Use the Data Validation feature in MapMate to warn you if you enter (variously) a duplicate, or a first for recorder, or a new hectad or VC record, etc: Data Entry > Records > Properties and click the Validation tab; then tick the desired validation checks.

Useful mapping resources (Hover cursor over link, press CTRL & click):

[BSBI DDb grid ref to vice-county converter tool](#)

Finds and maps GB and Irish Grid references in relation to vice-county boundaries.

[Cucaera.co.uk](#)

Shows grid squares (including DINTY) using backgrounds including Google Earth, OS maps, and also includes detailed vice-county boundaries in GB

[Get an Irish Grid Reference](#) – Simply click on a map to read off grid reference and altitude.

[Grab a grid reference](#)

Shows grid squares (including DINTY) at various resolutions, on maps & Google Earth in GB

[Magic](#) – shows SSSI boundaries, etc against detailed OS maps in GB.

[Ordnance Survey Ireland](#) Searches and maps Irish place names and Irish Grid References.

[Streetmap.co.uk](#) – Searches and maps place names, grid references, postcodes in GB and displays on OS 1:50,000 or 1:25,000 maps.

[Where's the path](#) OS maps alongside aerial photos with grid refs (including DINTY) in GB.

Memory Map

Alternatively you can buy OS or OSNI mapping from Memory Map at 1:50,000 or 1:25,000 scale for your computer. The licence covers 5 devices so you could also have the same maps on a second computer, smart phone and GPS as well. You can search for grid references and whole or part place names in the OS gazetteer. The cursor can also be set to read out grid references and altitudes.

BSBI, March 2017

¹ i.e. The population would be at risk of damage if the record were to be made public at full resolution.