

## Importing Data into MapMate

MapMate is generally good for recent survey data that doesn't have any complexity beyond the fields that the system is designed for. More complex data is better directed to the DDb and then exported from there back to MapMate as a sync file if needed.

### When should you import data into MapMate?

- When local or visiting members who don't use MapMate supply records in excel or access (Note that all members who contribute records regularly to VC Recorders are eligible for a BSBI supplied and licenced copy of MapMate. Recorders should apply to me.)
- When local or visiting members who do use MapMate supply records but you want to retain editorial control.
- Possibly when moving to MapMate from another recording system.
- Other?

**When *shouldn't* you import data into MapMate?** You should carefully consider whether data import is actually the best course of action. *Many* datasets are actually better imported directly into the DDb:

- Those which are the result of systematic surveys or research by third parties, or
- Part of much bigger datasets covering several vice-counties, or even the whole of Scotland,
- Records that use site centroids (mapmate only correctly copes with gridded data)
- Records from herbaria, where there is complex provenance structure (ex herb. details, curatorial notes, previous determinations etc)
- Records from actively maintained external databases, where future data refreshes are likely
- Data where external links, images or references are important (MapMate doesn't allow the import of references)
- Record sets that use taxon names not present (or only partially present) in MapMate
- Revisions of data already present in the DDb
- Any other case where importing the records into MapMate would involve either significant loss of detail or mean that structured information has to be coalesced in the Comments field

**Some datasets should NEVER BE imported** (as they will result in duplicates, or worse still, near duplicates!)

- Tabular data exports from the DDb. To include DDb data in MapMate use the DDb's synch file export mechanism instead
- Records from the NBN, iRecord, BRC or spreadsheet exports from other MapMate users
- Already digitized data from past BSBI projects (Atlas 2000, local change etc) - records almost certainly already exists in the DDb

If in any doubt please seek advice from Tom Humphrey.

### Why should you importing data into MapMate?

- It is easier and quicker than re-entering data into MapMate from scratch.
- You retain editorial control over records in future

- You build up a great local MapMate database of records for your vice-county:
- However we are increasingly encouraging recorders to treat the DDb as their main database (and MapMate as a way of entering your records into it).
- Also data can be sent back from the DDb to MapMate.

### **Why *shouldn't* you import data into MapMate**

- The import process is pernickety, for example taxa must be spelt precisely as they appear in the MapMate species dictionary, there must be no more (or fewer) spaces, commas, etc.
- Entering data into a spreadsheet generally bypasses validation checks that occur when you entering data into MM record by record. These checks then have to be done by the MapMate import process (wizard), and corrections made to the import file before submission to the MapMate import wizard. Many iterations are often required.

### **Who should import data into MapMate?**

- If it is a one-off import – like that associated with moving to MapMate from another recording system / database, and you have little experience of data import and validation then you are probably not the best person to import the data. Please contact me, and I can arrange expert support for you...
- If it is a regular (perhaps annual) contribution of records from a BSBI member, then you are (probably) best placed to undertake the import.

### **What format should you accept data from contributors?**

You should supply all potential contributors with a spreadsheet which is already in the correct format, with the correct fields and headers for import. Andy Amphlett has developed such an Excel Spreadsheet with a drop down taxon selector – so the scientific name is spelt exactly right.

### **Importing Data into MapMate**

The data to be imported must be supplied in plain text format (a tab text file with an extension .txt). Each line in the file represents one Record, and there can be no line breaks anywhere in the middle of a Record, nor blank lines anywhere in the file – including at the very end. Each record should be separated by a tab, and no record can have a tab character within it. Access & Excel will readily save data in this format. But to open such a file you should use Excel's Data > From Text wizard.

Before attempting to import data into MapMate it is worth spending time making sure you have the data in exactly the right format, and that it is thoroughly checked:

#### **Step 1: Prepare Import File**

Check data is in prescribed format with the correct fields, headers, and field formats in a spreadsheet (such as Excel). [This](#) information sheet will be useful to refer to. Also make sure there is nothing in the columns beyond (to the right) the Comments field or rows below the last record.

Other checks include:

- Check that none of the contents of Sites, Recorder or Determiner fields exceeds 64 characters.

- Check the spelling of Sites, Recorder & Determiner names; it is generally easier to check, correct and standardise names in a spreadsheet than once the data has been imported into MapMate.
- Check that dates are in a valid format and not in the future (or distant past!) Ensure that your spreadsheet date column is formatted to display dates in the correct format for MapMate.
- Check that Grid References have the correct initial letters and the correct number of digits.
- Check that there is no information in the comments field that would be better in another, more appropriate, field like stage (flowering or fruiting, etc), status (native, casual, planted, etc) or quantity.

This is a great opportunity to use the DDb Validation Tool, (particularly against off-shore or out-of-county records) as MapMate doesn't check for this when importing tabular data and it can be a source of many errors: <http://bsbidb.org.uk/gridrefparser.php>. After which you should correct any errors identified by it. (We will speak about this later.)

Finally save the spreadsheet (eg in Excel format); THEN save it again but this time as a text delimited tab (\*.txt) file.

### **Step 2: Use the MapMate Importer (Handout)**

There are two excellent step-by-step short videos on importing data into MapMate on the [BSBI MapMate website](#). There are instructions in the Help files within MapMate itself: from the main MapMate screen go to the Help menu and click on "Help topics". Now click on the "Search" tab, type in the word "import", click on "List topics", and in the resulting list double-click on "Using Text Import". Finally there are also detailed instructions in the BSBI Mapmate Handbook ([Chapter 5](#)).

**Finally** two things that might interest those who have already done a bit of importing in the past?

1. To see what you have already imported (Watch Import video 1 12:00-13:00).
2. To Edit reference to something more meaningful (Watch Import video 1 14:28-16:16).

**Jim McIntosh, BSBI Scottish Officer, March 2015**