Getting Started with Wildlife Recorder 4

Version 1 – June 16, 2019

Introduction

Wildlife Recorder 4 is a comprehensive yet simple package for the maintenance of wildlife records on a personal computer running under the Microsoft Windows® operating systems Windows Vista, Windows 7, Windows 8 and Windows 10. The data entered is held on the computer where it can be accessed even if no internet connection is available.

With Wildlife Recorder you can record all the details you require about the wildlife you have observed. The package can be used to record information about all forms of wildlife, e.g. birds, butterflies, dragonflies, mammals, moths etc.

In addition to keeping data about your observations Wildlife Recorder can be used as a highly effective index to your digital photos, video clips sound recordings etc.

Once you have entered your information into Wildlife Recorder it is a simple matter to summarize your sightings into lists and produce printed reports and checklists, analyse data in graphs and plot your sightings on maps.

Reports are output as PDF files, or as RTF files for input to word processing.
Data can be exported for use in spreadsheet packages or for sharing with other people.

Data can be imported from external systems which allow export of data in a suitable manner. Data exchange with eBird and Birdtrack is supported.

General Concepts

Wildlife Recorder maintains information about sightings, lists, locations, observers and species.

- Trips and Sightings are equivalent to your field notebook.
- Locations are the places you have visited.
- Species are the species you observe. Species lists are provided for birds, mammals, dragonflies, butterflies, moths, reptiles and plants. With the professional version of Wildlife Recorder you can make your own species lists. The actual databases you have will depend on the version of Wildlife Recorder you have purchased.
- Lists are summaries of your individual sightings they fulfil same function as the lists which you may currently produce on paper.

Species data is provided with Wildlife Recorder. Full lists of birds, butterflies, dragonflies, moths and mammals are available. The actual databases you have will depend on the version you have purchased.

The species databases which are currently available are:
World Birds, World Mammals, European Butterflies, North American Butterflies, World Dragonflies, World Reptiles and British Moths.

For the birds, mammals, butterflies, dragonflies and reptiles databases comprehensive distribution information is also provided so it is easy to find out which species occur in any particular country and for some larger countries, states as well.

A full taxonomy editor is provided so that you can change the provided data or create new databases for taxa which are not supplied.

Some geographic data is also provided, countries are predefined as are many states and provinces for larger countries.

So, what do you enter into the system? Well basically all you have to enter is the names of the places you have visited, the dates on which the visits took place and a list of the species you saw on that visit.

You can tell Recorder to keep any number of lists; these can be country lists, county/state lists, sites lists, lists based on an area defined by latitude and longitude etc. Lists may be life or year lists. You do not specifically have to tell Wildlife Recorder which species belong to the lists you have created, it will automatically work out which species belongs in which list from the sightings you have entered.

Some Terms defined

Database	A database contains all your data. A database can only hold data about 1 taxon. You must set up separate databases to hold data for birds, butterflies dragonflies etc.
Trip	To Wildlife Recorder this is a visit to a location at a given date and time.
Sighting	An observation of a single species at a location on a given date and time. Sightings belong to a trip.
Country	In Recorder this is usually a political country, but may also be a large island mass etc.
State	A sub-division of a country
County	A sub-division of a state.
Site	A geographic location which has been visited.
List	A summary of sightings usually on a geographic basis.
Workspace	A Workspace is a filtered view of the database which makes it easy to enter sightings for a particular geographic area.

The Sightings Workspace explained

If you were to enter your sightings from a trip on your local patch wherever it might be e.g. in the USA or UK it would be very difficult and time consuming to select the species you had seen from an entire list of World birds.

Wildlife Recorder overcomes this problem by allowing you to filter the species list so that it only shows those species which you are interested in for a given geographic area. E.g. You want to enter sightings from a trip in California. You don't want to see irrelevant species that occur say in Africa, Europe or Asia etc. so by utilizing the Wildlife Recorder geographic distribution and selecting "California" you can be sure that you will only be selecting species that you are likely to have seen.

Now, we could have made it so that you had to tell the system which area you wanted to use each time you wanted to create a trip, but to save even more time, once you have set up for using a geographic area you can save that request for later use. You may give your workspace a name e.g. "California Records", the saved request is known as a workspace.

When you open a Workspace it does the following:

- Filters the list of Trips shown, so that only trips for the specified geographic area can be seen.
- Filters the Species List so that when you select species for your sightings you only see relevant species.
- Filters the geographic list so that when you go to select the site visited for a trip you only see relevant sites.

The workspace concept is the key to easy use of the system

Remember a Workspace does not contain your data, it merely provides a filtered view into your data. If you delete a workspace you do not delete your data merely that view into it.

Recording Strategies

General

Different people have different requirements for recording what they see. These will vary from just noting the names of the species seen to complete detailed notes including counts, ages, habitats, descriptions etc. Wildlife recorder can cope with this complete spectrum of needs.

Making Tick Lists

If you simply want to create a simple tick list of species you have seen and are not interested in entering trips and sightings, that is possible. All you need to do is create a list for the geographic area you are interested in (Country or State) and use the “Simple species list” option to tick off what you have seen.

Normal day by day recording

Most people make notes of the species that they see while on a trip in a paper notebook. These notebooks are normally arranged chronologically and then by site visited. This is the exact scenario used by Wildlife Recorder to hold sightings data. The typical method of entry is:

Enter the date and (optionally) time of the visit
Enter the name of the place visited.
Enter the details of all the species seen on the visit.

The scenario shown above is recommended for normal day by day usage, and can be used to enter your detailed historical records from your notebooks.

Entering your historical records

If you wish to keep complete details of your historic data, you can employ the normal day-by-day method.

Alternatively, if you wish to rapidly record the species you have seen into Wildlife Recorder and you do not have complete details of your historical records you can enter summaries of your records from whatever lists you already have. What you do need to do is enter sufficient information to allow the generation of those lists you are interested in.

We would recommend that you enter at least the following:

- A list of species seen for every country you have visited. You do this by creating a trip and selecting a country name rather than a site name.

- A list of species seen for every state/county which you wish to maintain a list for. You do this by creating a trip and selecting a state or county name rather than a site name.

- A list of species seen for every individual site which you wish to maintain a list for.

When entering in lists as suggested you can either enter the actual date on which you first saw a species or some arbitrary date of your own choosing.

Entering data in batches by species or other groupings

The usual method of sightings entry is in trip form as described above. If this is not suitable you may use the Bulk Sightings feature to enter batches by species, observer or virtual any sequence. The Bulk Sightings feature allows you to decide what data should be retained between records to minimize the amount of keying you need to do.

Summarising your sighting into lists

To Wildlife Recorder a list is just a summary of your sightings. Because of this there is no need for you to know which lists you want to keep before you start entering your sightings.

At any time you can ask Wildlife Recorder to make a new list and it will automatically go through all your sightings to calculate the list contents.

You can keep lists for sites, counties, countries, faunal zones and continents.

Lists can be life lists or lists for a defined period e.g. year lists.

You can display lists on the screen, produce printed reports and summarise them to provide a report showing the number of species seen and other data.

You can compare your lists against the distribution data provided to identify targets to be seen on future trips.

Speech Recognition

Wildlife Recorder incorporates the ability to speak species names into the computer while entering sightings. This can greatly speed up data entry.

In order to make effective use of this facility please take note of the advice below.
Following this advice will greatly improve the accuracy of the speech recognition software.

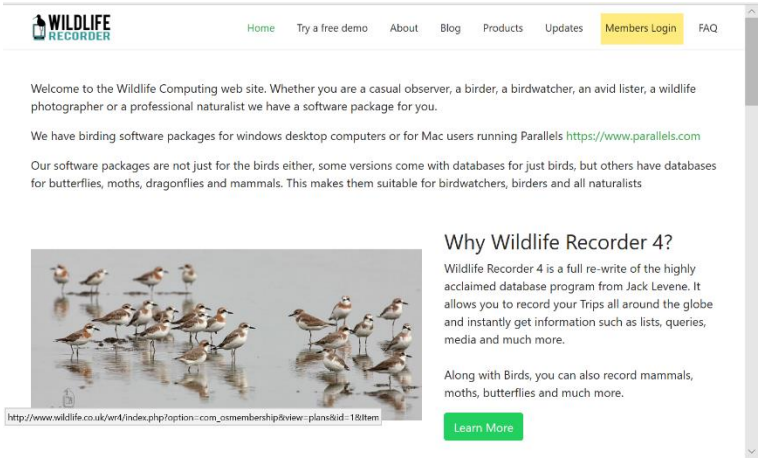
1. Use a good quality headset microphone.
2. When you are speaking your records make sure to minimise any background noise.
3. Use the training software to tailor the recognition to your own voice. The more training you do the greater the accuracy you will achieve.

Full details on how to configure and train speech can be found in the Wildlife Recorder online help.

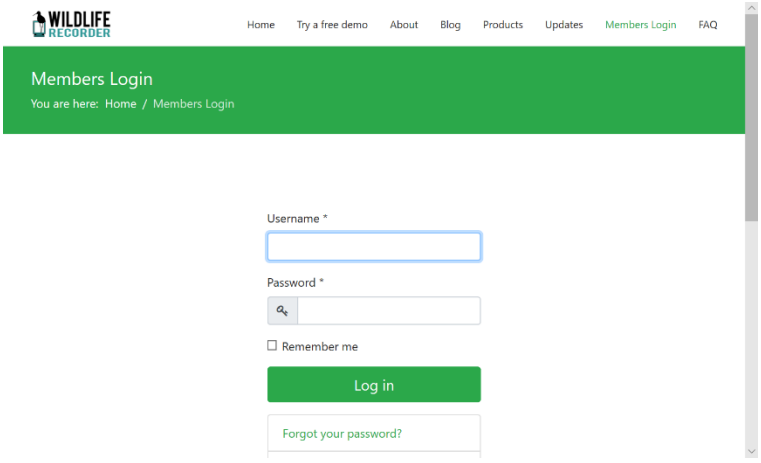
Installing Wildlife Recorder 4

After you have purchased Wildlife Recorder 4 you will receive an email with your members area login details. After you have received this email you can download the Wildlife Recorder Setup and install the program as follows.

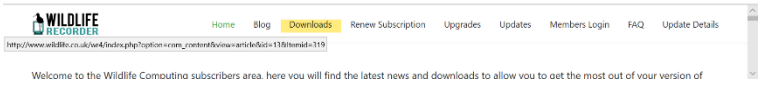
Go the Wildlife Recorder 4 Website by typing www.wildlife.co.uk in the address bar of your internet browser. The Wildlife Recorder website will be displayed.



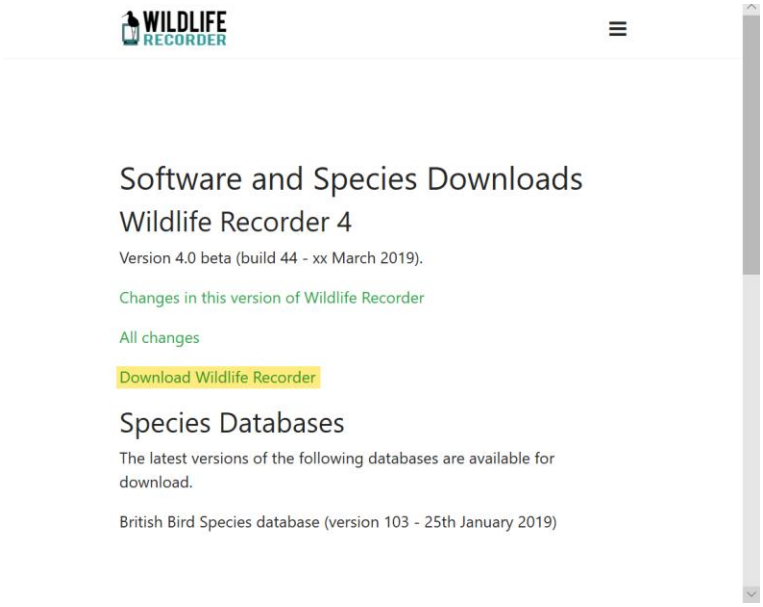
Click Members Login the login page will appear.



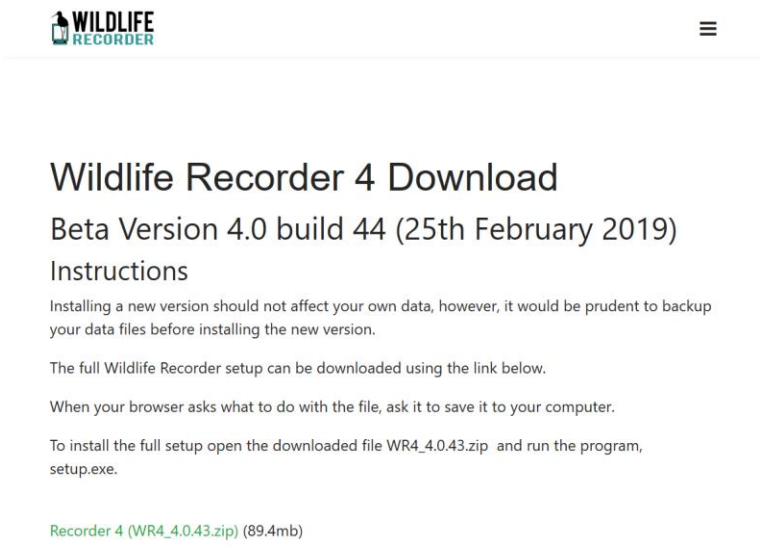
Enter the Username and password you received in your email and click Log In. The main web members web page will be displayed.



Click on Downloads and the Downloads page will be displayed.



Click on Download Wildlife Recorder the download instructions page will be displayed.

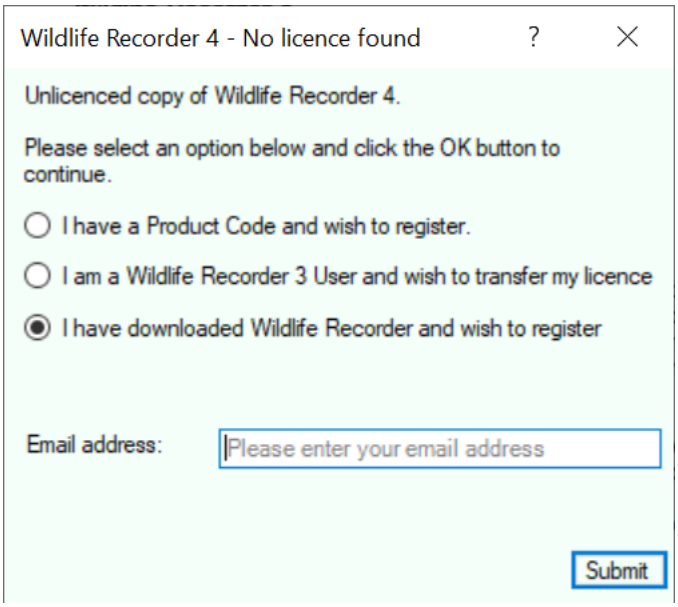


Click the download link to download the setup program.

Once the download has completed open the downloaded zip file. The downloaded zip contains 1 file, run WR4Setup.msi

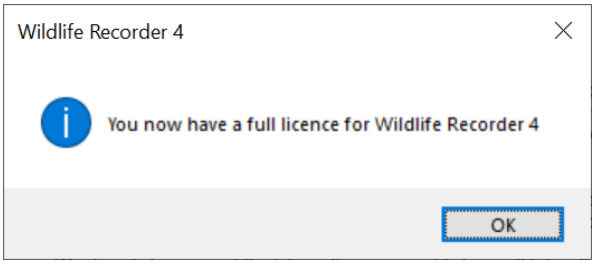
When the setup has completed run WR4 by double-clicking the WR4 icon

The first time you run WR4 you need to register (N.B. you need to be connected to the internet); you will see the following screen.



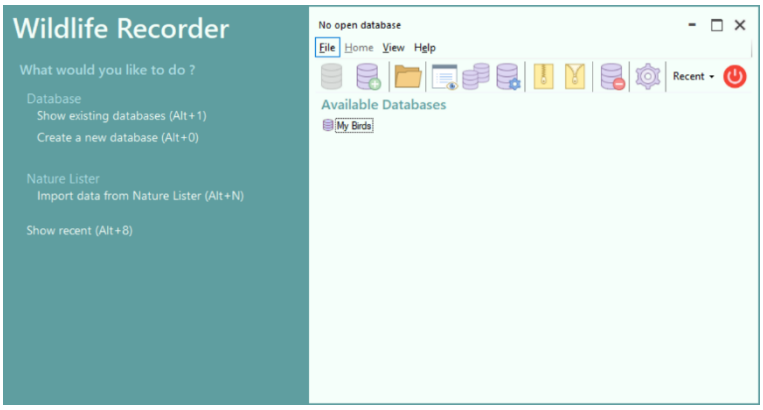
Select the option I have downloaded Wildlife Recorder and wish to register.
Enter the same email address you used to purchase Wildlife Recorder 4.
Click the Submit button.

A confirmation screen is displayed:



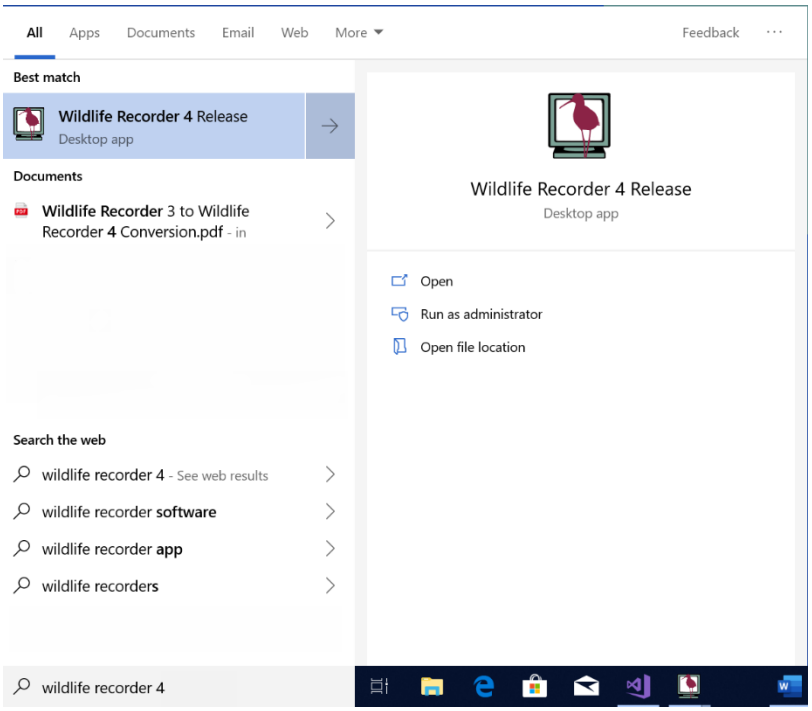
If you downloaded a trial the message will differ.

Click OK to continue, the initial Wildlife Recorder screen will be displayed. Your first database has been created for you automatically.



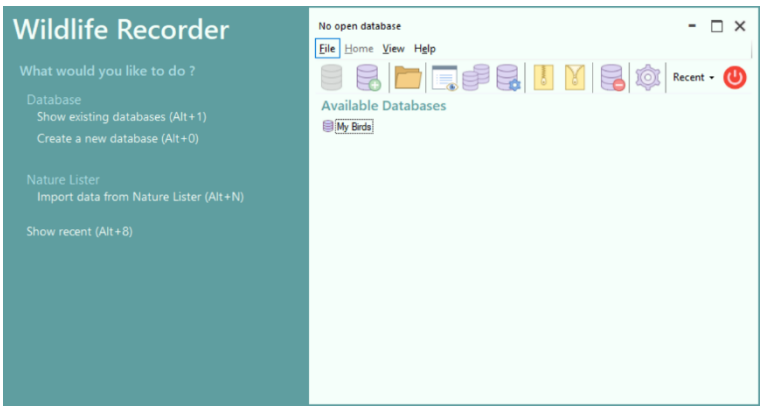
Starting Wildlife Recorder

Start "Wildlife Recorder 4" by double-clicking on the Wildlife Recorder icon on your desktop, or, by entering “Wildlife Recorder 4” in the search field on the Windows task bar.

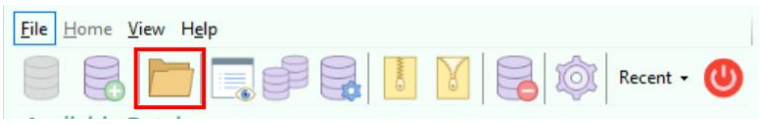


The initial Wildlife Recorder 4 screen will be displayed:

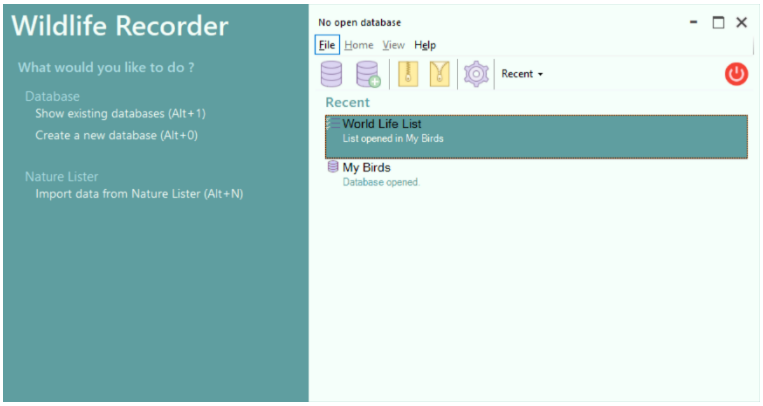
If this is the first time you have used Wildlife Recorder 4 the screen will look like this:



To open the database you want to work with, click on the name of the database and then click on the **Open** button in the toolbar. Alternatively you can double-click the name of the database.



On subsequent runs the initial screen will show recently performed tasks and will look similar to the one below:



Double-click any entry in the Recent List to perform that operation again.

Quick Tutorials

Tutorial – 1. Entering some sightings

This tutorial will guide you through creating a trip and adding some sightings to it.

A video tutorial is available, click the link to view the tutorial Entering some sightings

A text version is available here

Tutorial – 2. Entering some sightings using a map

Wildlife Recorder 4 has the ability to select locations from a map using Bing Maps or Google Maps.

This tutorial uses the map to select a trip location and add some species sightings to the trip.
On the toolbar click the Preferences icon

A video tutorial is available, click the link to view the tutorial Entering some sightings using a map

A text version is available here

Tutorial – 3. Making a tick list

His tutorial shows how to make a simple tick list of species seen for when you are not interested in recording detailed information about dates and locations.

A video tutorial is available, click the link to view the tutorial Making a tick list

A text version is available here

Tutorial – 4. Creating a list from existing sightings

A list is a summary of sightings, as you enter trips and sightings any lists you have created will automatically be updated based on the geographic are for the trip. For example if you have a United Kingdom list and you are entering a trip for a place in the united Kingdom then all the species you add to the trip will be added to or updated in the UK List, if you had a World list then that would also be updated.

In tutorials 1 and 2 we added some trips and sightings for Queensland, all the species for those trips will have been added automatically to the World list which is created automatically when a database is first used. We do not yet have a list for Queensland, in this tutorial we will create a Queensland list which will automatically be populated with the species selected in tutorials 1 and 2.

A video tutorial is available, click the link to view the tutorial Creating a list from existing sightings

A text version is available here

Tutorial – 5. How to view your existing sightings

Your Trips and Sightings are arranged geographically in workspaces.

In tutorials 1, 2 and 3 we added some trips and sightings this tutorial shows how you can view those trips and sightings.

A video tutorial is available, click the link to view the tutorial Viewing your existing trips and sightings

A text version is available here

Tutorial – 6. How to view your existing lists

You can keep as many lists as you like.

In tutorial 4 we created a list for Queensland, this tutorial shows how you can see which lists you have and then view their contents.

A video tutorial is available, click the link to view the tutorial Viewing your existing lists

A text version is available here

Tutorial – 7. How to create a species checklist

You may create species checklists for any of the distribution areas provided with the databases.

In this tutorial we will create a checklist for Arizona.

A video tutorial is coming soon.

A text version is available here

Tutorial – 8. Creating a target list from a species checklist

You may compare species checklists for any of the distribution areas provided with the databases with your own lists to provide a target list of species not yet seen.

A video tutorial is coming soon.

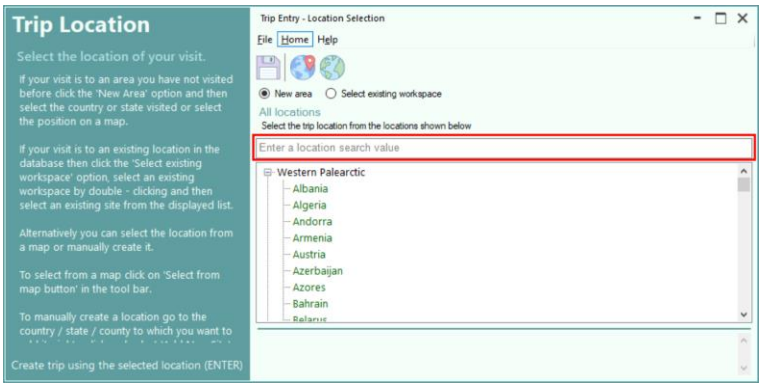
A text version is available here

Text Tutorials

Tutorial – 1. Entering some sightings

1. After opening the My Birds database, as described earlier, click on the Enter a detailed trip and sightings link.

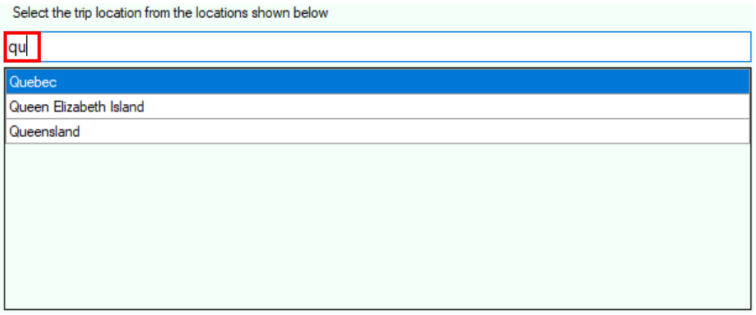
2. The location selection screen will be displayed:



A location for the trip must be selected. The database contains geographic information about countries and for some states. It does not have details of the sites you may have visited, you need to add those yourself.

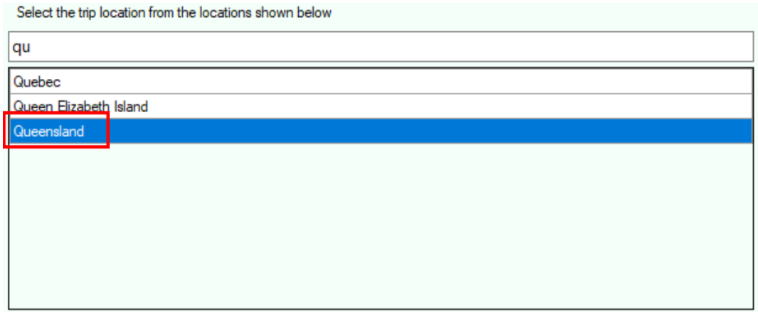
In this tutorial we are just going to use state Queensland as the trip location.

3. Start typing the name of the state:

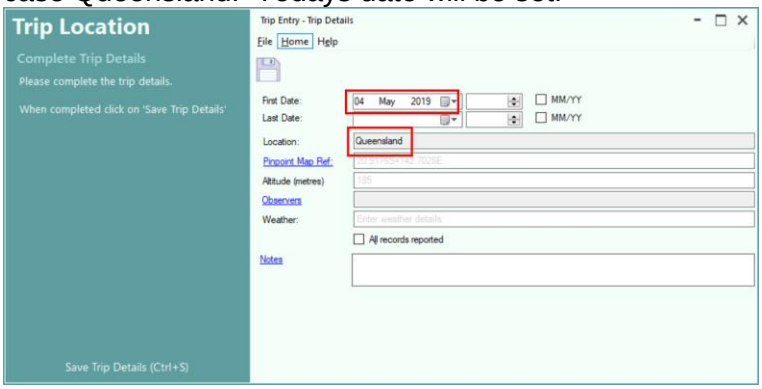


As you type any matching names are shown.

4. When you can see the location name you want you can double-click on it to select it.



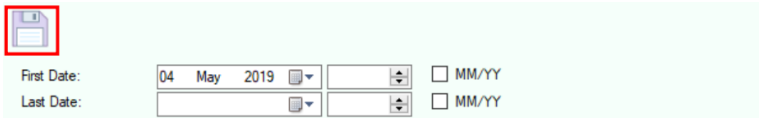
5. The trip details form will be displayed showing the name of the location you have chosen, in this case Queensland. Todays date will be set.



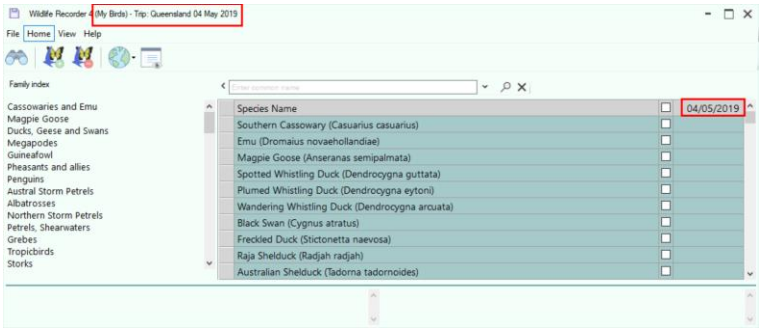
If you want a different date you can enter or select it yourself.

Although data can be entered about a trip; date and location are the only mandatory data items.

6. Click the Save button to save the trip details and proceed to selecting the species seen.

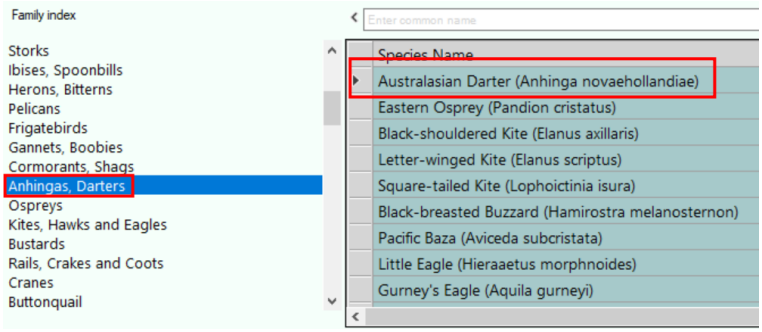


7. The species selection screen will be displayed:

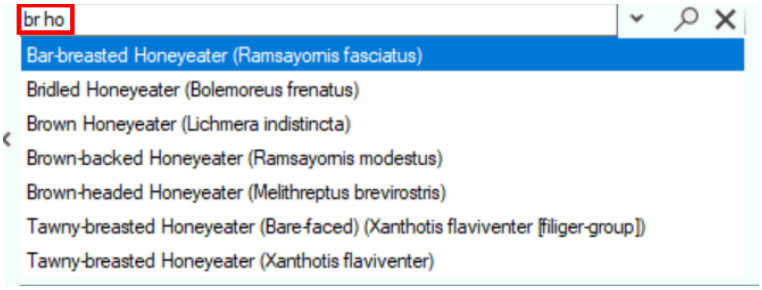


You can see the trip details in the form heading. The list of species displayed is tailored to the country and state you selected; in this case a list of the birds occurring in Queensland.

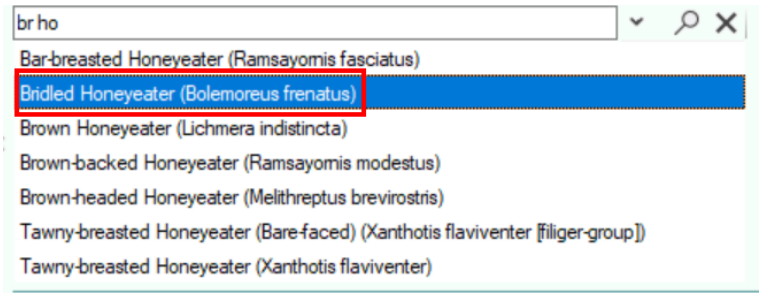
8. You can quickly go to the first species for a family of birds by clicking the family name in the family list at the left of the form.



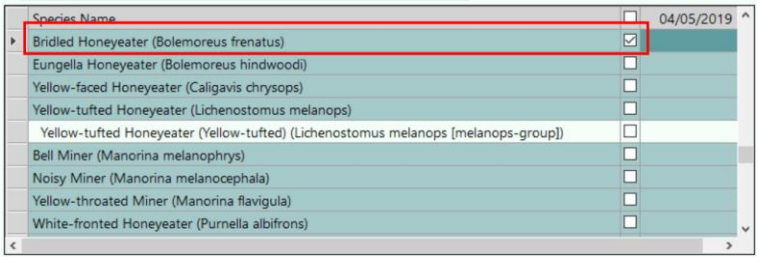
9. You can search for a species by name in the species search box. You can enter part names



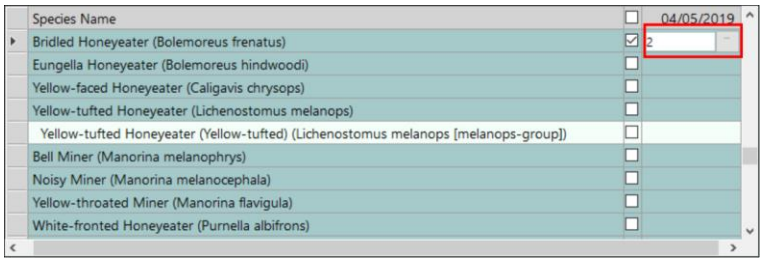
10. Double-click a name to go to the species.



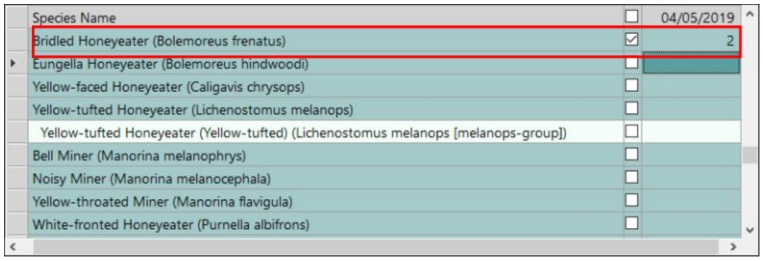
11. The species list is positioned to the selected species and is “ticked”.



12. To select a species for the trip it is only necessary to click in the checkbox, however, if you also want to enter a count click in the cell to the right of the “tick” and type in the count.



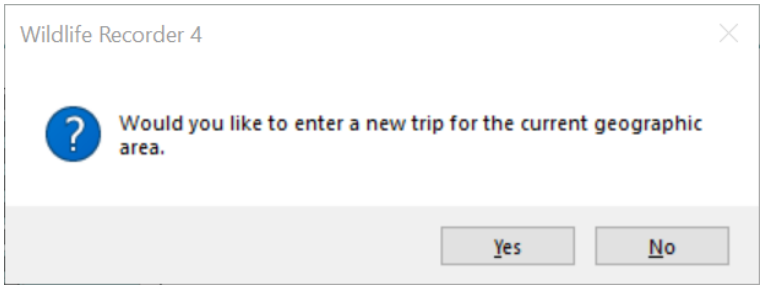
To save the count press the Enter/Return key.



13. Other data such as notes, status, age and sex can be entered. Details can be found in the help for the screen.

14. Continue selecting the species you have seen and when you have finished click the save button or press Ctrl+S on the keyboard to complete the species selection.

15. The following message will be displayed.



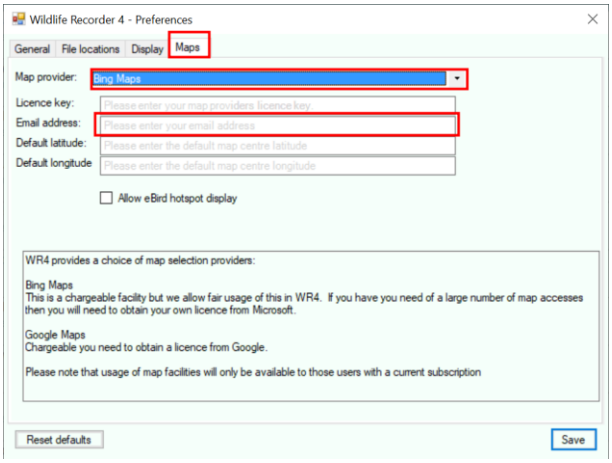
For the purposes of this tutorial we will click the **No** button.

Wildlife Recorder 4 has the ability to select locations from a map. Map selection can be performed using Bing Maps or Google Maps. N.B. Bing Maps and Google Maps require you to have a licence. We allow fair use of Bing Maps using our own licence, if you have a hevy requirement to use maps use must obtain your own licence.

Before you can use the maps you need to set the Wildlife Recorder 4 map preferences as follows:

On the toolbar click the Preferences icon

The Preferences form will open.



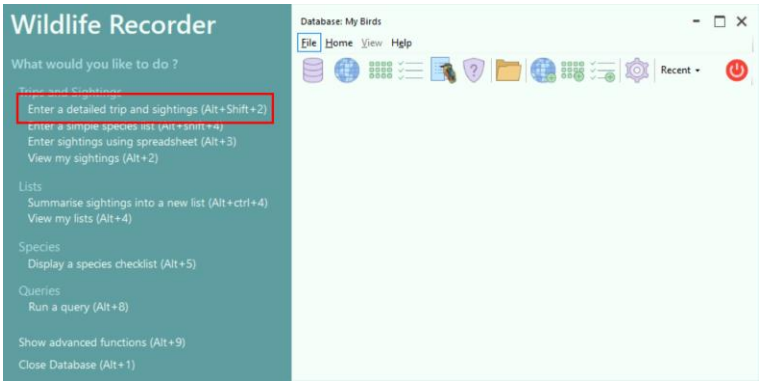
Select the **Maps** tab, then select Map provider **Bing Maps** enter your email address in the Email address field.

If you have your own Bing Maps licence key please enter it in the licence key field.

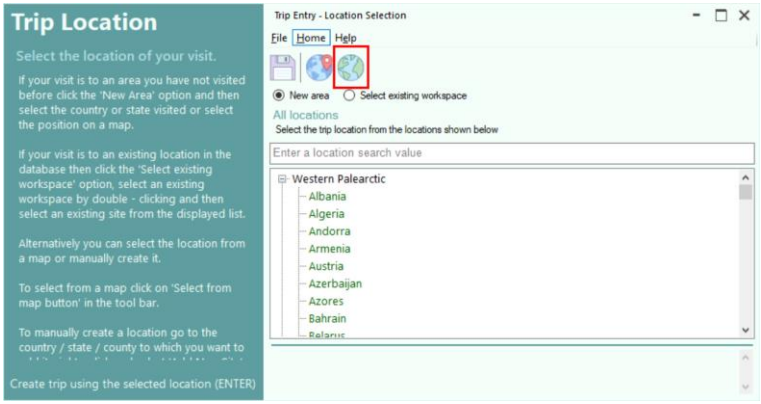
A valid email address is required if you want to get information back about the places you have chosen from the map.

Click the **Save** button to save your mapping preference.

1. After opening the My Birds database, as described earlier, click on the Enter a detailed trip and sightings link.

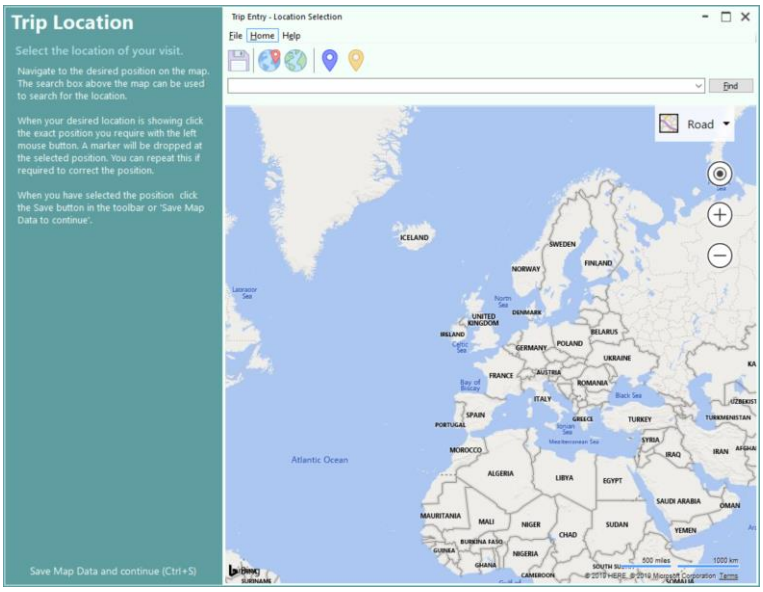


The location selection form will be displayed:



Click the map icon on the toolbar.

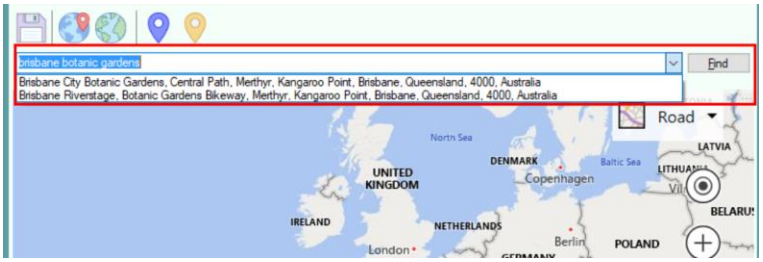
2. The map form will be displayed.



The basic map controls are:

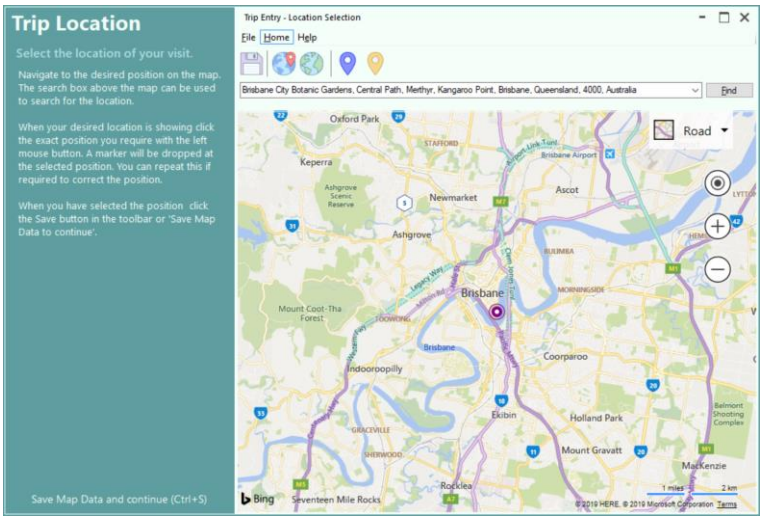
Scroll	Hold down the left mouse button and move the mouse.
Zoom in	Click on the plus icon or use the mouse wheel.
Zoom out	Click on the minus icon or use the mouse wheel.
Select the trip location	Click the left mouse button on the map at the desired location, a red circle icon will appear.

3. To search for a location enter a search value in the search field and click the **Find** button

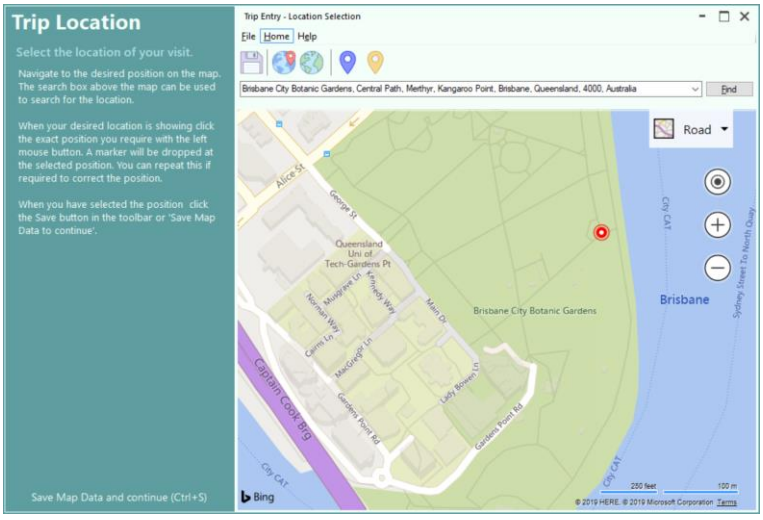


Places which match your search are displayed.

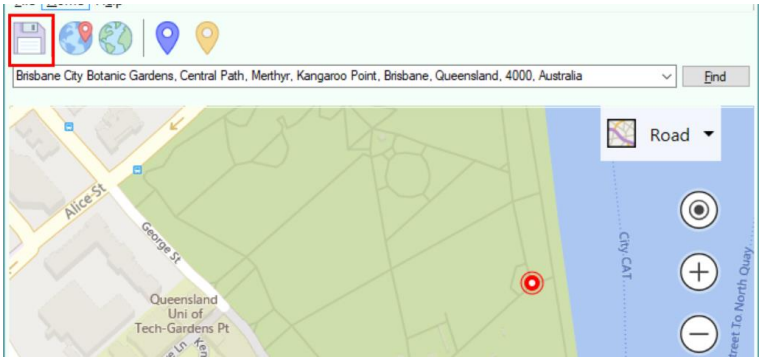
4. Click the item in the matching places lists for the place you require. The map will be displayed showing the selected place marked with a purple circle.



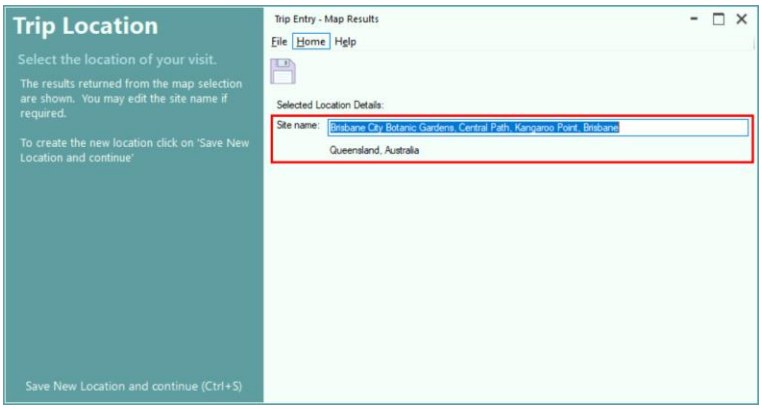
5. You can zoom in using the plus icon or the mouse wheel. Select the exact position you require by clicking left mouse button on the map; a red circle will be displayed.



6. Save the selected position by clicking the save button in the toolbar.

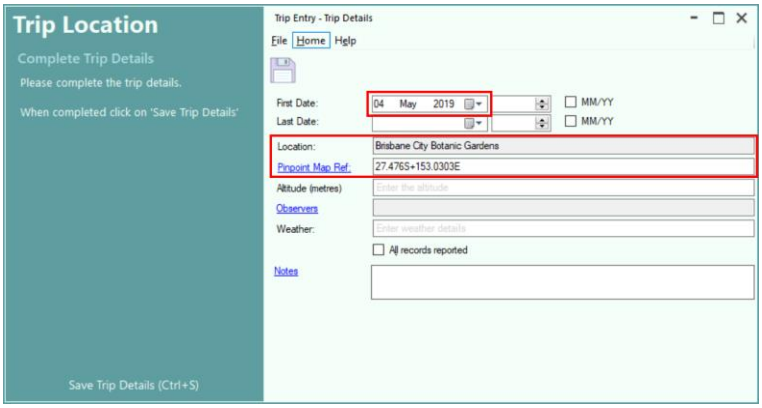


7. The name of the selected location is returned; it can be edited if required.



We will edit the name and then click the Save toolbar button to continue.

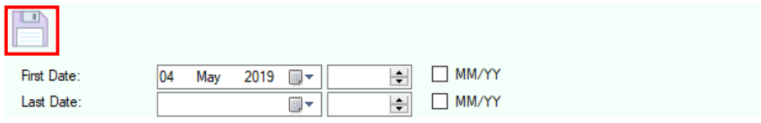
16. The trip details form will be displayed showing the name of the location you have chosen and the in this case Brisbane City Botanic Gardens the chosen latitude and longitude are also displayed. Todays date will be set.



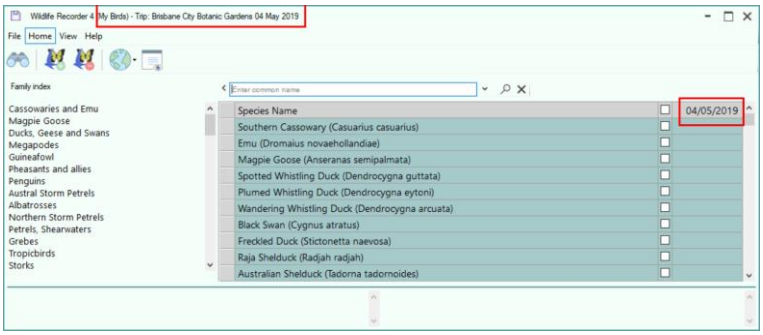
If you want a different date you can enter or select it yourself.

Although data can be entered about a trip; date and location are the only mandatory data items.

17. Click the Save button to save the trip details and proceed to selecting the species seen.

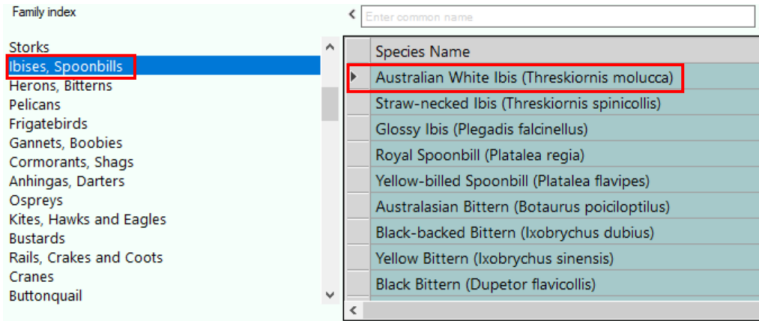


18. The species selection screen will be displayed:

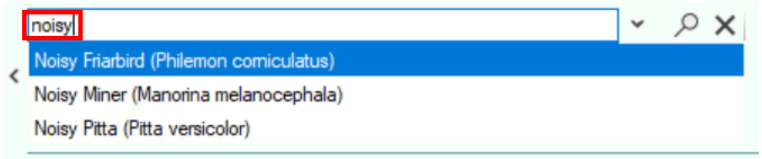


You can see the trip details in the form heading. The list of species displayed is tailored to the location you selected; in this case a list of the birds occurring in Queensland.

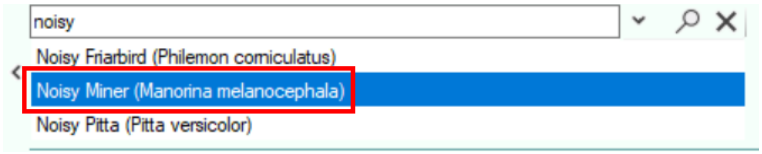
19. You can quickly go to the first species for a family of birds by clicking the family name in the family list at the left of the form.



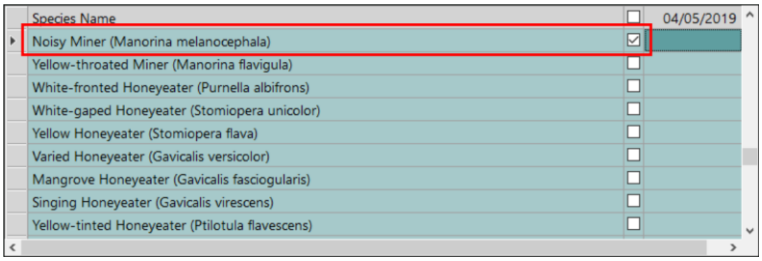
20. You can search for a species by name in the species search box. You can enter part names



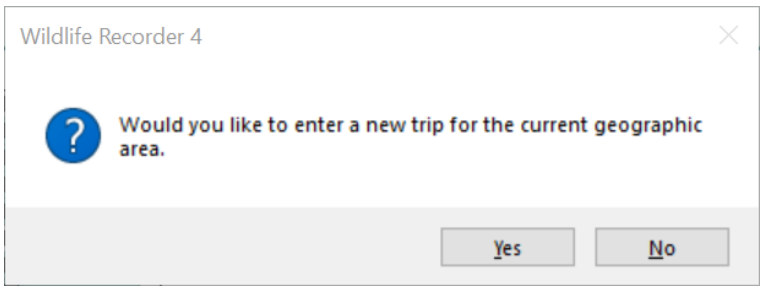
21. Double-click a name to go to the species.



22. The species list is positioned to the selected species and is “ticked”.



23. Continue selecting the species you have seen and when you have finished click the save button or press Ctrl+S on the keyboard to complete the species selection.The following message will be displayed.

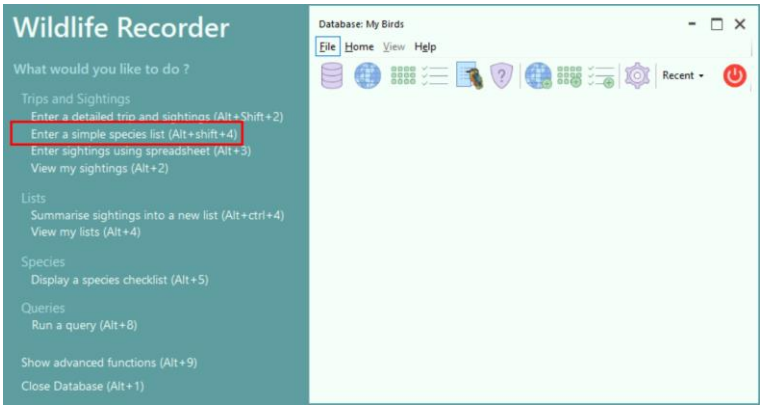


For the purposes of this tutorial we will click the **No** button.

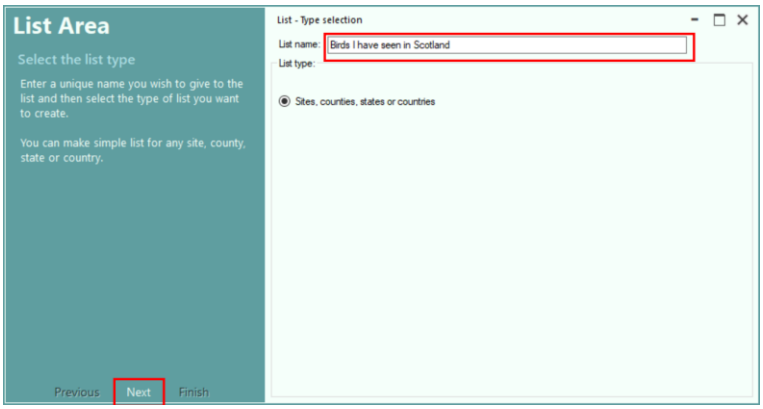
Tutorial – 3. Making a tick list

If you are not interested in recording detailed information about dates and locations visited and simply want to make a tick list of species seen in a country or state it can be done as follows.

1. After opening the My Birds database, as described earlier, click on the Enter a simple species list link.



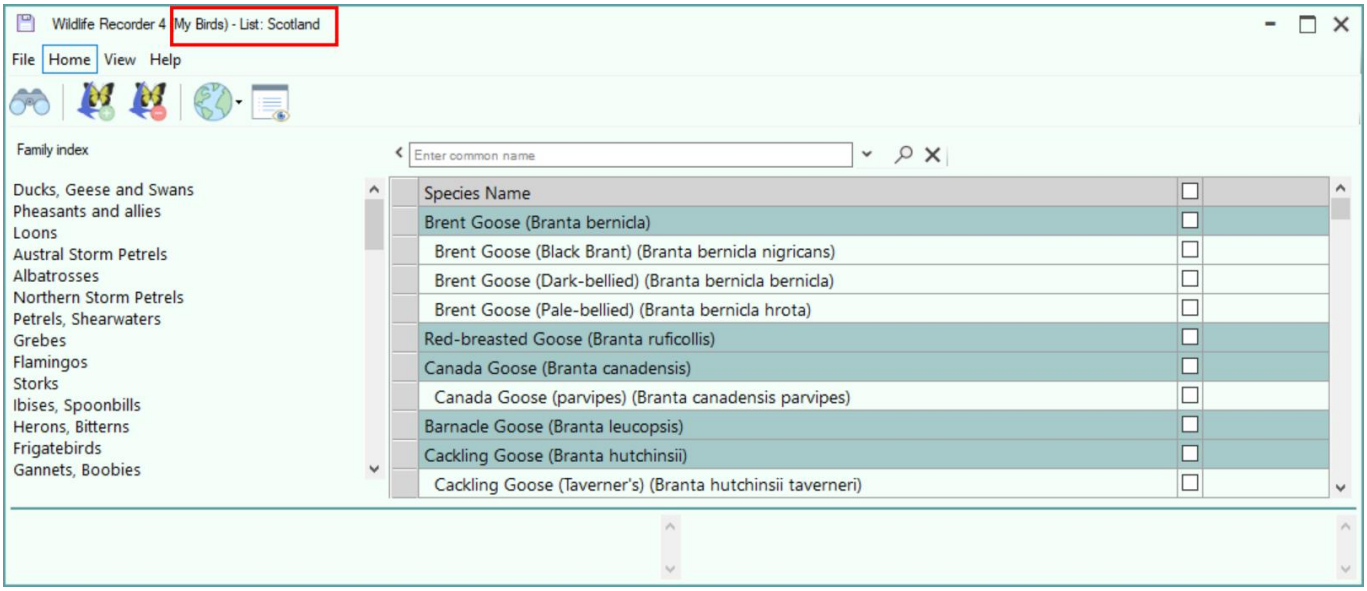
2. You need to give your list a name.



Enter the name you want to give your list and then click the Next link or press Enter/Return on the keyboard.

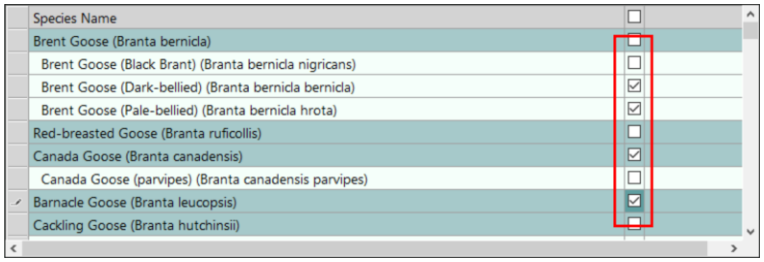
3. Now select the Country or state by searching the location list. When you have found the country or state, select it by clicking in the check box to the left of the name. Click the Finish link to start selecting the species.

4. The species selection screen will be displayed:

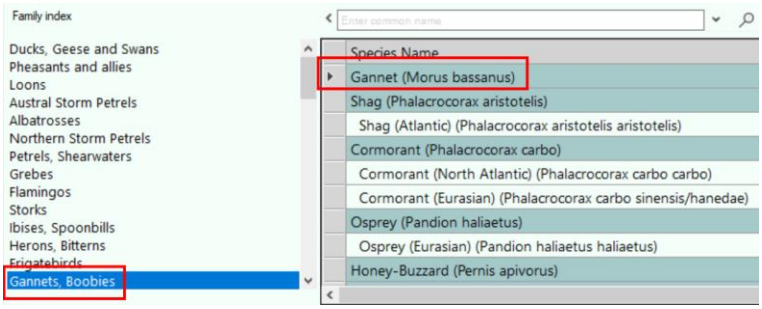


You can see the List details in the form heading. The list of species displayed is tailored to the location you selected; in this case a list of the birds occurring in Scotland.

5. Tick off the species you have seen.



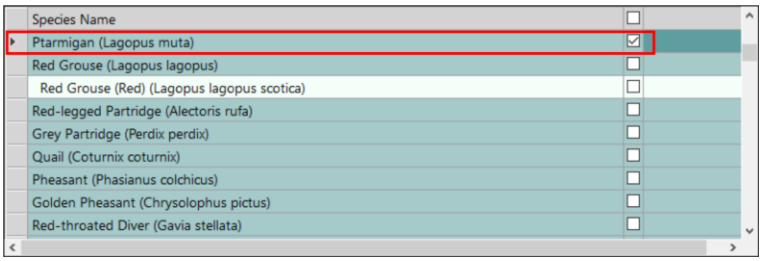
6. You can quickly go to the first species for a family of birds by clicking the family name in the family list at the left of the form.



7. You can search for a species by name in the species search box. You can enter part names

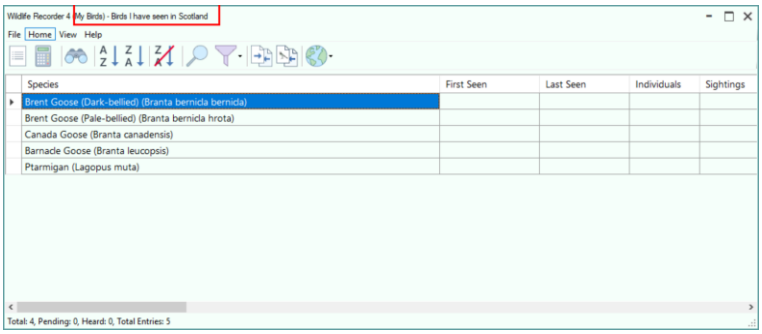
Double-click a name to go to the species.

8. The species list is positioned to the selected species and is “ticked”.



9. Continue selecting the species you have seen and when you have finished click the Save button or press Ctrl+S on the keyboard to complete the species selection.

10. The list you have entered is displayed.



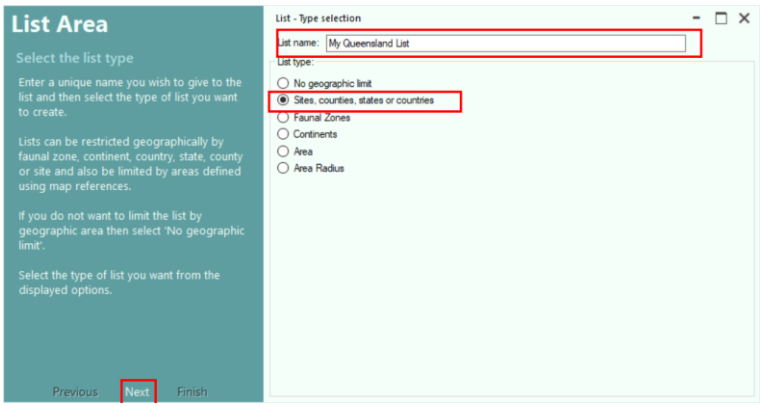
Tutorial – 4. Creating a list from existing sightings

A list is a summary of sightings, as you enter trips and sightings any lists you have created will automatically be updated based on the geographic are for the trip. For example if you have a United Kingdom list and you are entering a trip for a place in the united Kingdom then all the species you add to the trip will be added to or updated in the UK List, if you had a World list then that would also be updated.

In tutorials 1 and 2 we added some trips and sightings for Queensland, all the species for those trips will have been added automatically to the World list which is created automatically when a database is first used. We do not yet have a list for Queensland, in this tutorial we will create a Queensland list which will automatically be populated with the species selected in tutorials 1 and 2.

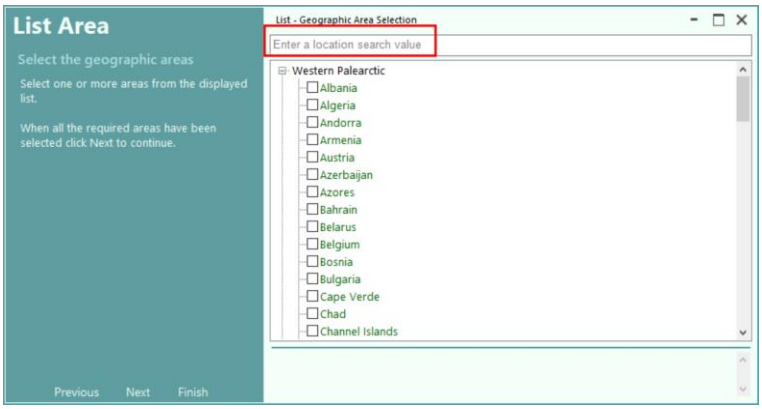
1. After opening the My Birds database, as described earlier, click on the Summarise sightings into a new list link.

2. The List Type Selection Form will be displayed, enter the name you want to give your list in the name field and since the list is going to be for state Queensland select the option sites, counties, states or countries.

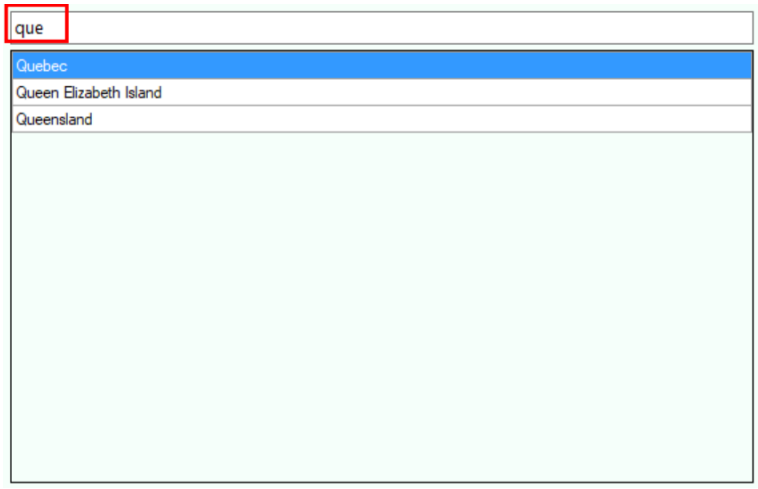


Click the **Next** link or press the Enter/Return key to proceed to the next step.

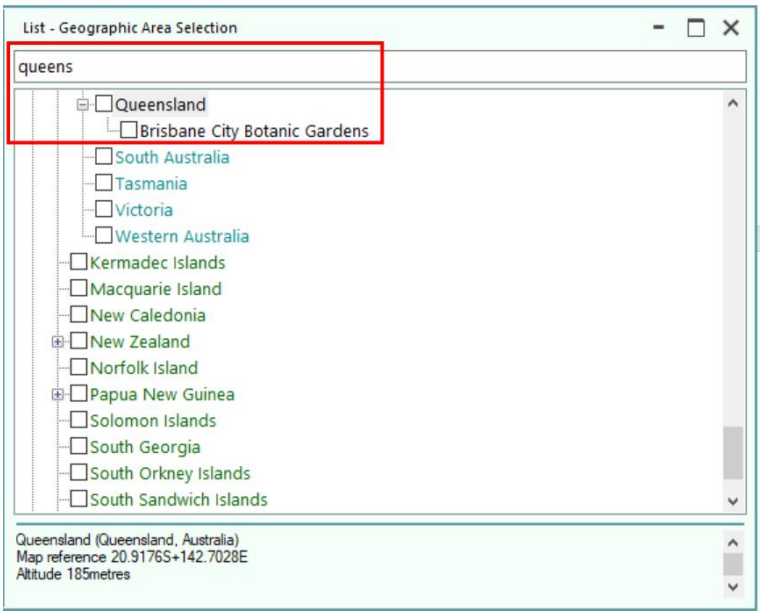
3. The List Geographic Area Selection form is displayed.



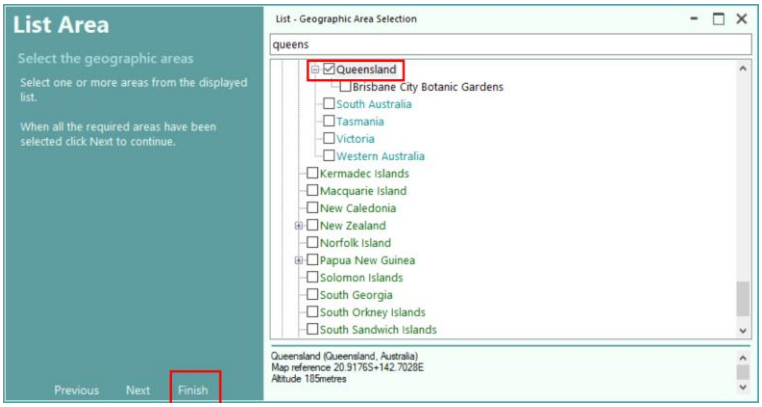
Start typing Queensland into the location search box, as you type a list of matching names is shown.



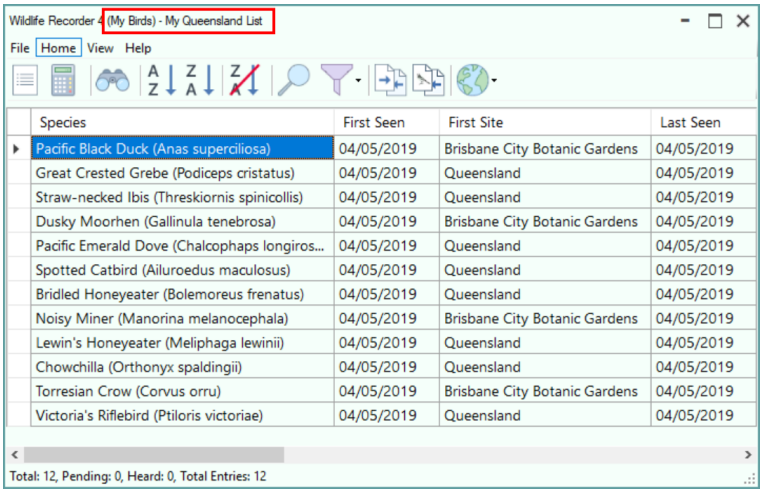
You can select Queensland from the matches list by double-clicking on it, but if you continue typing until only one match is found then Queensland will be automatically found.



4. Select Queensland by clicking in the check box to the left of the name and then click the Finish link to create the list.



5. The list will now be created and populated with the species from all the trips entered for Queensland. The List will be displayed.

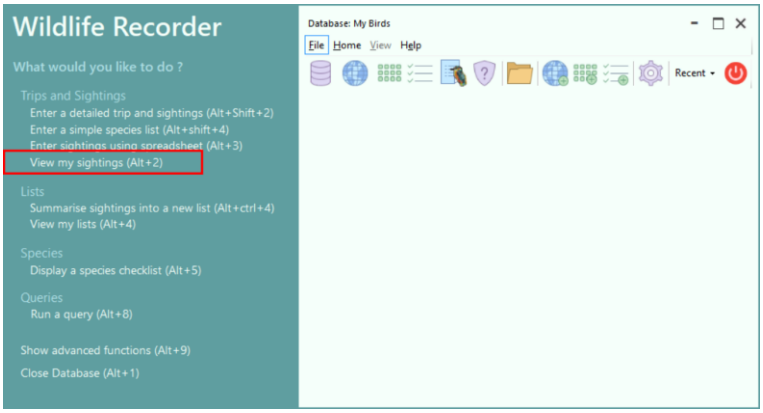


Tutorial – 5. Viewing your existing trips and sightings

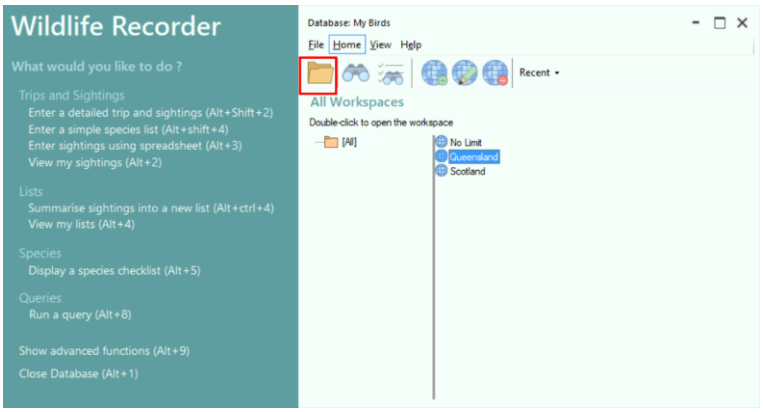
Your Trips and Sightings are arranged geographically in workspaces.

In tutorials 1, 2 and 3 we added some trips and sightings this tutorial shows how you can view those trips and sightings.

1. After opening the My Birds database, as described earlier, click on the View my sightings link.

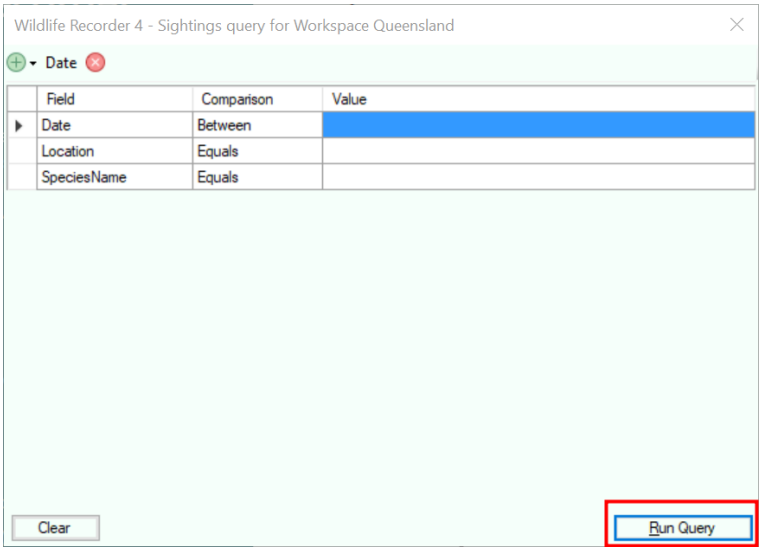


2. A form is displayed showing the workspaces (geographic areas) for the trips and sightings created in the earlier tutorials.

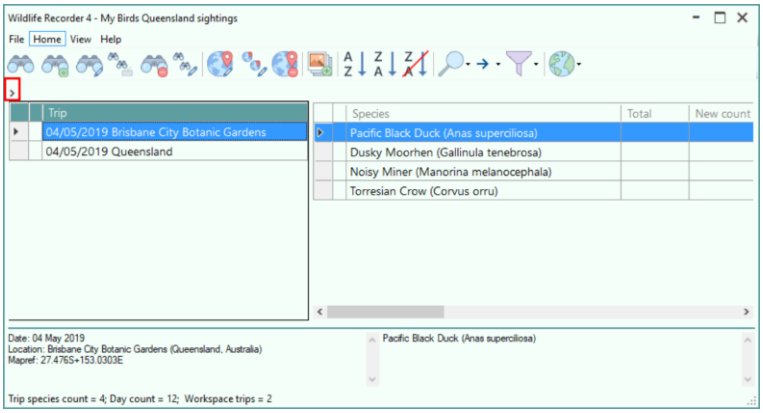


   Select Queensland and click the Open icon in the toolbar, alternatively you can double-click the name or press the Enter key.

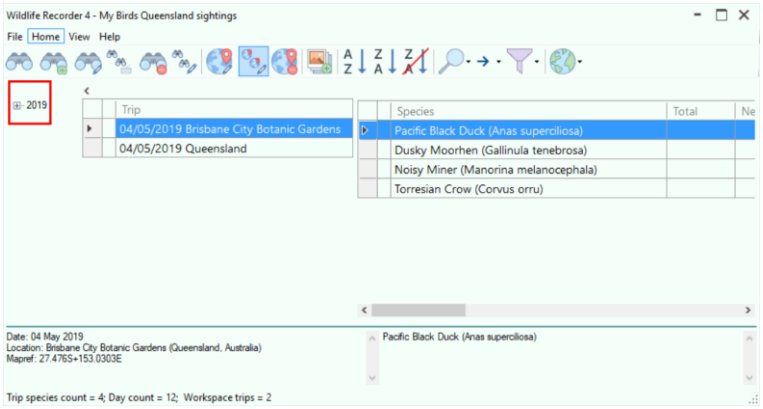
3. A query form is displayed, at the moment there are very few trips and sightings so limiting what is displayed is not important so we will just click the Run Query button to continue.



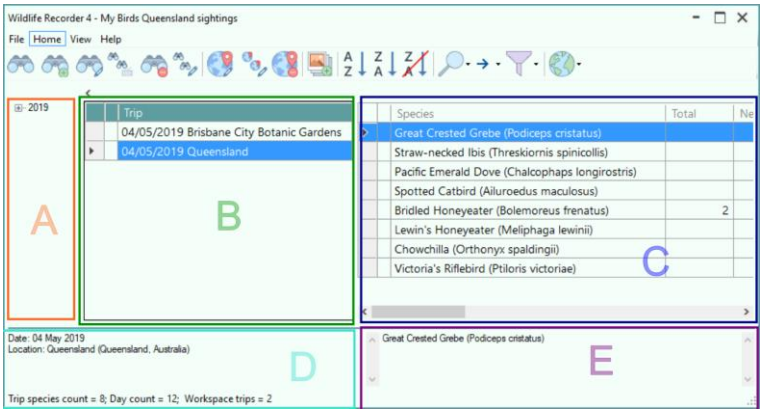
4. The Trips and sightings are now displayed. Showing the Trips entered in the earlier tutorial.

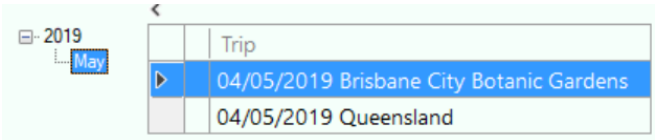


5. Clicking the Expand button will display a navidation pane which allws fast navigation to the trips for any year and month.



6. The trip shows the trips and sightings form has the following areas:



A	Fast selector for trips. By opening the tree and double-clicking on a month you can rapidly navigate to the first trip for that month. 
B	List of Trips showing date and location of trip.
C	Species sightings for the currently selected trip.
D	Full Trip details for the currently selected trip.
E	Full sightings details for the currently selected trip.

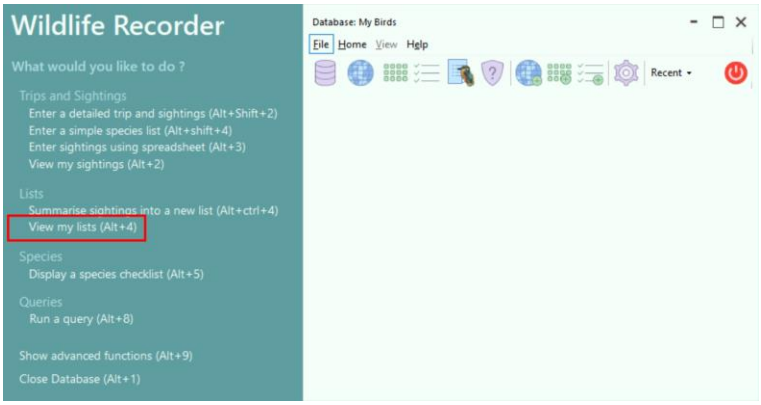
From the trips and sightings form you can add new trips, edit existing trips, request reports, export your data and much more. All of these finctions are accessible from the toolbar and context menus.

Tutorial – 6. Viewing your existing lists

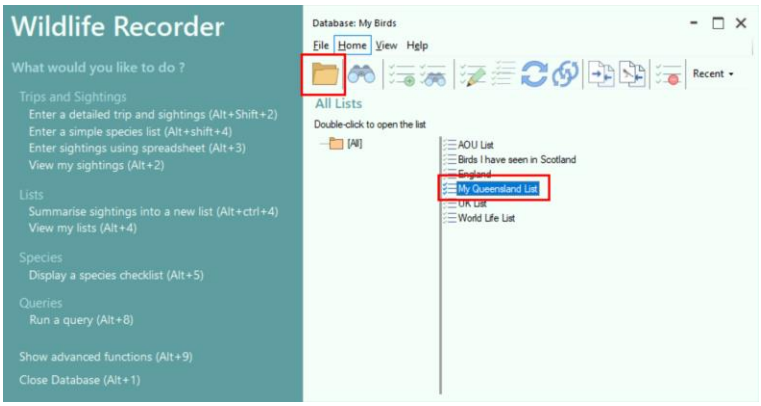
You can keep as many lists as you like.

In tutorial 4 we created a list for Queensland, this tutorial shows how you can see which lists you have and then view their contents.

1. After opening the My Birds database, as described earlier, click on the View my lists link.

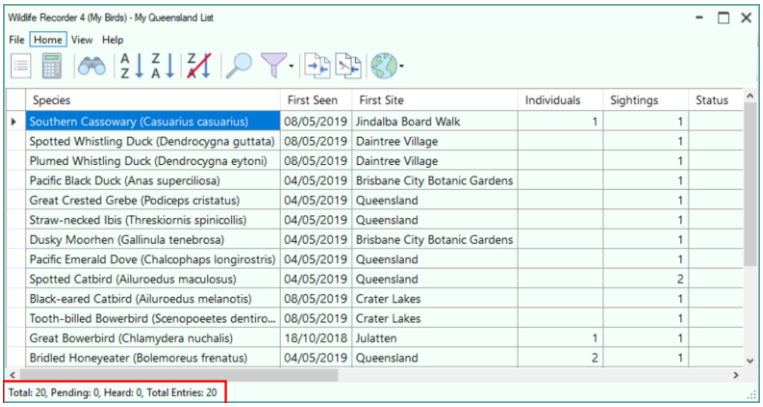


2. A form is displayed showing your lists. (N.B. the AOU list, UK list and World Life List are created auatomatically when a database is first created.)



   Select My Queensland List and click the Open icon in the toolbar, alternatively you can double-click the name or press the Enter key.

3. The List form is displayed showing all the species you have entered sightings for which are in the geographic area you selected for the list.



At the bottom of the screen there is an information area which gives the following information:

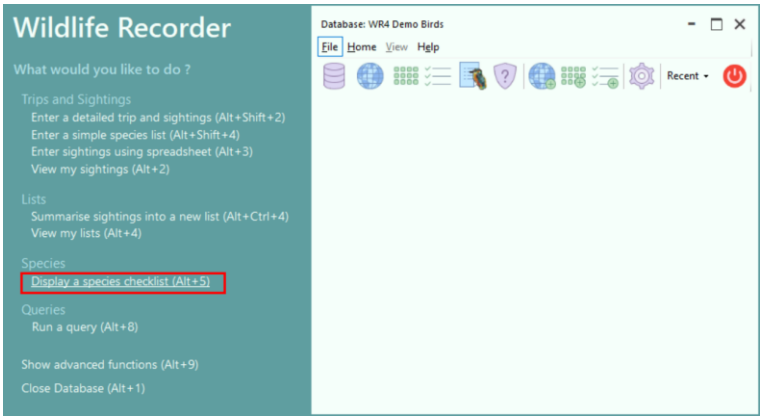
Total	The total number of full species in the list
Pending	The number of species whose status is Pending
Heard	The number of species which were only heard
Total Entries	The total number of rows in the list (Species and Subspecies)

Tutorial – 7. Creating a species checklist

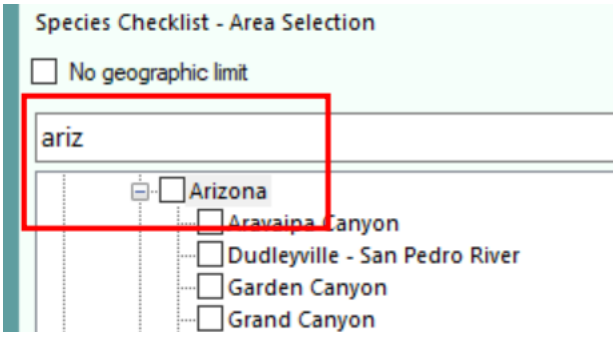
You may create species checklists for any of the distribution areas provided with the databases.

In this tutorial we will create a checklist for Arizona.

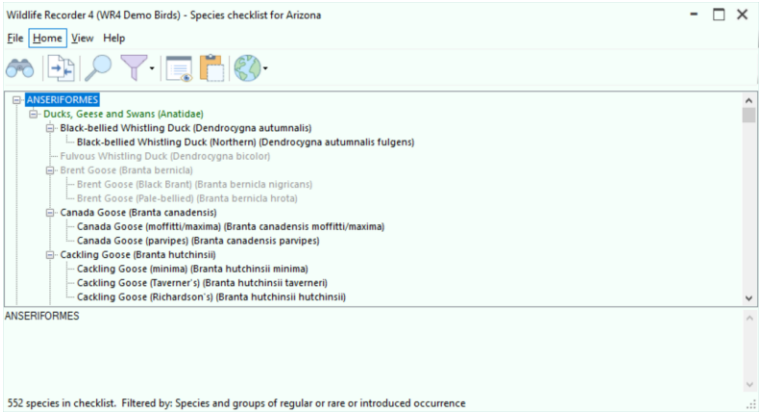
1. After opening your, as described earlier, click on the Display a Species Checklist link.



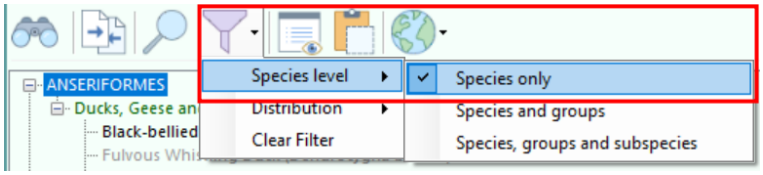
2. The distribution area selection form will be displayed. Start entering Arizona into the search box. You will be positioned to Arizona in the areas list.



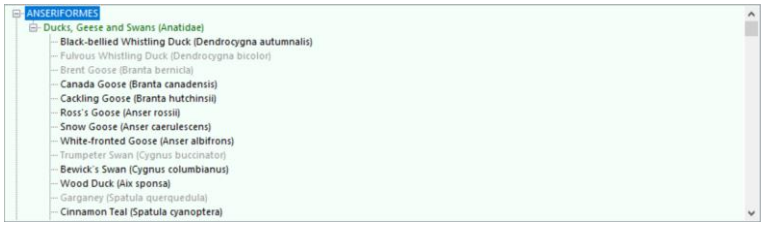
3. Select Arizona by clicking in the selection box. Click on the Display Checklist link to display the checklist.



4. The species and subspecies displayed in the checklist can be changed by using the Filter. We will use the Filter to show limit the display to full species only. Click on the Filter icon in the tool bar and select Species level and then Species only.



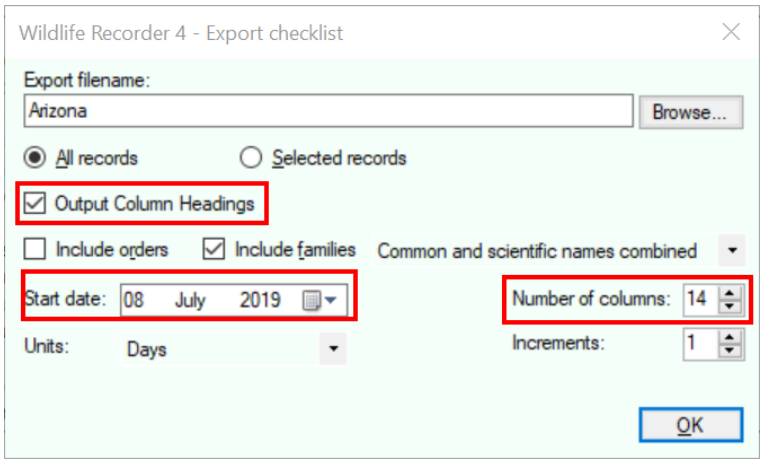
5. The checklist will be re-displayed showing only full species.



6. The checklist can be exported to a spreadsheet so that it can be printed out for use on trips. To export the checklist click on the File Menu and thhen the Export toolbar icon.

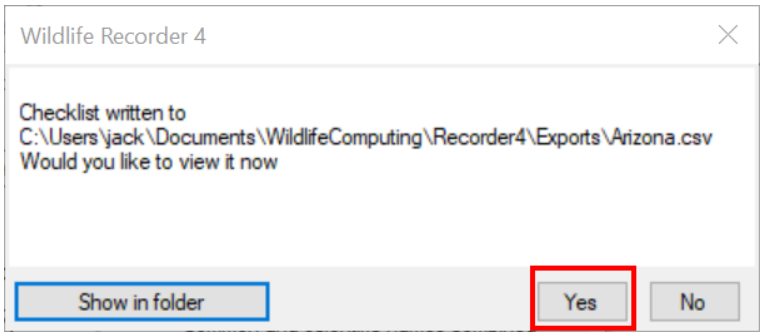
7. The Checklist Export Form will be displayed.

   You can specify the start date for your checklist and the number of day columns you want in the list. In this example the start date is set to 8th July 2019 an we have requested 14 day columns to be displayed.



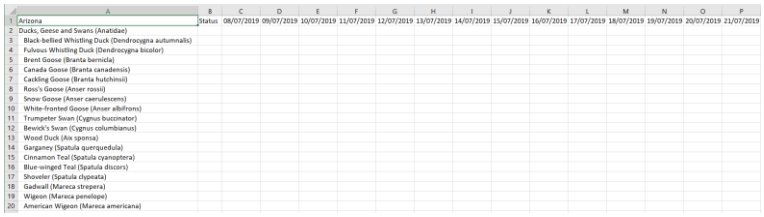
   Click OK to export the checklist.

8. A message will be displayed when the export has completed.



If you click Yes the checklist will be displayed in your default spreadsheet program. In this example the spreadsheet program is Microsoft Excel.

9. The spreadsheet will be displayed. Notice how the columns are dated commencing with the specified checklist start date.



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P
1	Arizona	Status	08/07/2019	09/07/2019	10/07/2019	11/07/2019	12/07/2019	13/07/2019	14/07/2019	15/07/2019	16/07/2019	17/07/2019	18/07/2019	19/07/2019	20/07/2019	21/07/2019
2	Ducks, Geese and Swans (Anatidae)															
3	Black-bellied Whistling Duck (Dendrocygna autumnalis)															
4	Fulvous Whistling Duck (Dendrocygna bicolor)															
5	Brent Goose (Branta bernicla)															
6	Canada Goose (Branta canadensis)															
7	Cackling Goose (Branta hutchinsii)															
8	Ross's Goose (Anser rossii)															
9	Snow Goose (Anser caerulescens)															
10	White-fronted Goose (Anser albifrons)															
11	Trumpeter Swan (Cygnus buccinator)															
12	Bewick's Swan (Cygnus columbianus)															
13	Wood Duck (Aix sponsa)															
14	Garganey (Spatula querquedula)															
15	Cinnamon Teal (Spatula cyanoptera)															
16	Blue-winged Teal (Spatula discors)															
17	Shoveler (Spatula clypeata)															
18	Gadwall (Mareca strepera)															
19	Wigeon (Mareca penelope)															
20	American Wigeon (Mareca americana)															

Tutorial – 8. Creating a target list from a species checklist

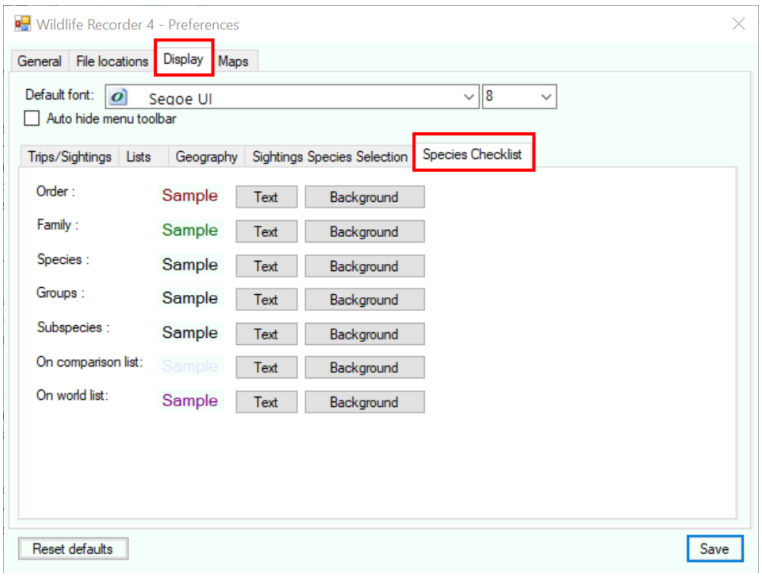
You may compare species checklists for any of the distribution areas provided with the databases with your own lists to provide a target list of species not yet seen.

In the previous tutorial we created a checklist for Arizona, in this tutorial we will compare that checklist with the existing Arizona list to highlight species already seen and those not yet seen.

1. Colours are used to highlight species in the selected comparison lists so first we will set our colour preferences.

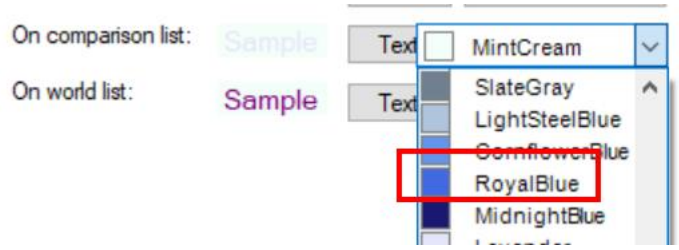
   Click the File menu and the Preferences icon to display the Preferences form

2. On the Preferences form click the Display tab and then the Species Checklist tab to display the preferences for Species Checklists.

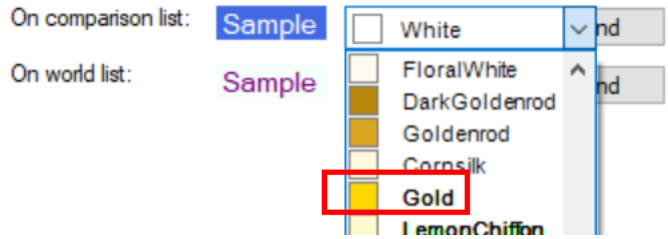


3. We will set the preferences so that species in the checklist which are on the selected comparison list will have a blue background and gold text.

   Click the Background button by On Comparison List and select Royal Blue.



   Click the Text button by On Comparison List and select Gold.

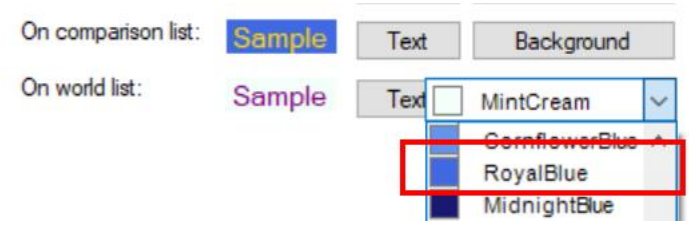


   The text against On Comparison List will show using the selected colours.

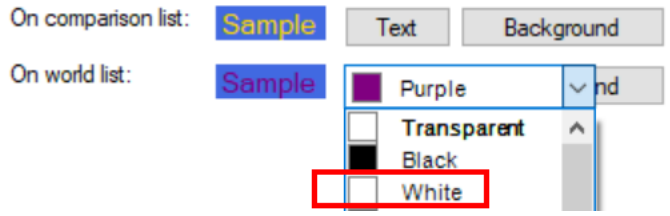
4. In addition to comparing with the selected comparison list the checklist is also compared against your world life list.

   We will set the preferences so that species in the checklist which are not on the selected comparison list but which are on your world list will have a blue background and white text.

   Click the Background button by On world list and select Royal Blue.



   Click the Text button by On world list and select White.

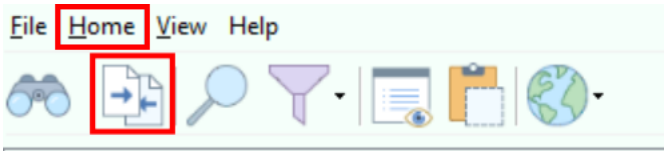


   The text against On world list will show using the selected colours.

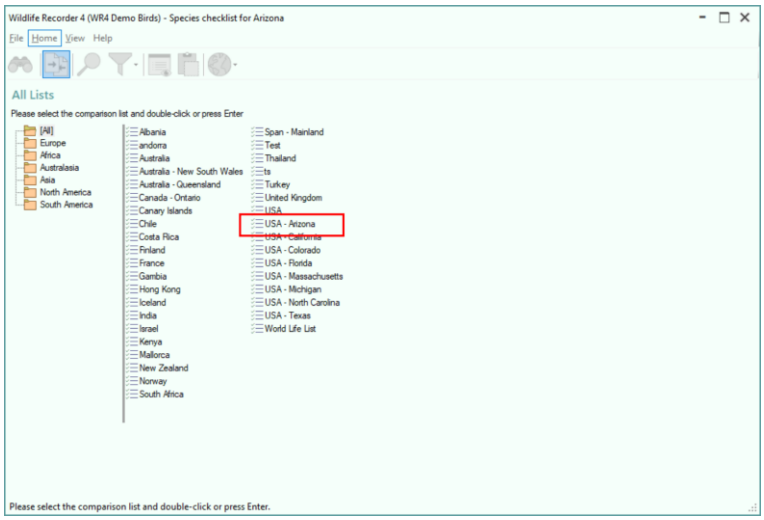
5. Click the Save button to save the colour preferences.

6. We will now select the comparison list. The demo database already has a list of species already recorded in Arizona so we will choose that.

   Click the Select Comparison List icon from the Home Toolbar.



7. The Select Comparison List form is displayed.

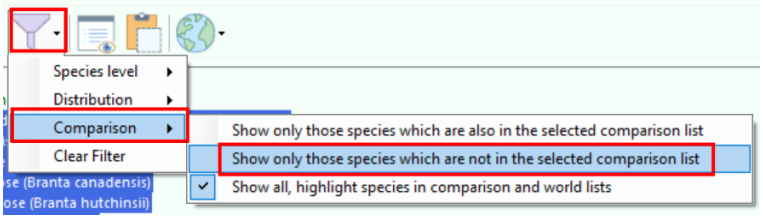


Double-click on USA – Arizona to select the list.

8. The checklist will be displayed showing species which match the comparison list in the selected colours.

9. The checklist can be filtered so that only species which are not on the comparison list are displayed.

   Click on the Filter toolbar icon then click Comparison and then Show only those species which are not in the selected comparison list.



   The checklist now shows only those species which are not in the selected comparison list.