

Taxonomy Update General Instructions

(Print this -- you must follow these instructions)

General Instructions

Your AviSys Version:

If you have an older version of AviSys 4, please install the update to Version 4.58, available on our web site, or upgrade to Version 5, before performing this update. (This update won't work with older releases.)

If You Have Been Having Problems:

If you have been having data problems, do not proceed with this update -- resolve them first. Data problems are invariably resolved with **Utils / Rebuild Sighting File Indexes**, **Utils / Certify Data Set Quality**, or the **Emergency** button if AviSys won't start. Problems not resolved with those actions, or repetitive need for those actions, are invariably caused by hard drive problems -- we recommend SCANDISK or Norton Utilities / DiskDoctor to try to resolve them.

Concepts:

Because AviSys would not dare to attempt to change any of your sightings automatically (the risk is just too great), this update facility scans your current sightings and produces an "exception" report from which you can make sighting changes yourself, with the assurance that a machine has not made some assumption and made a serious mistake with your data. As a result, this is not a quick-and-dirty update process for those people who have a lot of sightings of species that have recently changed -- mostly world species if you have kept up to date. Please reserve some time to get this update done properly. Where you see the eight headers, "**Required Action**," they mean just that -- check them out to see if you need to perform the listed action -- the vast majority of our support calls for taxonomy updates are because those paragraphs are ignored.

A: Do a Backup First

Required Action:

** Before performing the AviSys taxonomy update, please **do a fresh backup** of the data set you are updating on a new diskette or CD. (**Remember**, to back up to CD, you must first format the blank CD in My Computer by RIGHT-clicking the drive and selecting Format. If Format does not appear, use your CD software.) Keep this backup separate, out of the normal cycle of backup diskettes you normally use.

** If you have any custom checklists (checklists you marked yourself), back them up now.

Backing Up a Custom (User-marked) Checklist

Because the data for a custom checklist is not stored in a separate cache, if you delete it from the Checklist Menu, accidentally or otherwise, it is gone forever-unless you back it up to file. To do so, simply invoke the checklist, select Reports / Checklist, and select the invoked checklist. From the Print Options dialog, select Text File. At the marker dialog, be sure to select "No Checkmark Boxes," de-select "Use ' and ' Sighted Markers," and de-select "Use Endemic Markers." At the Save As. . . dialog, use an extension of **.CLB** -- overriding any asserted .TXT extension. The **.CLB** extension is important.

B: The First Pass

Required Action:

Please study the document TAXONOMY5.PDF which was presented when you installed this update.

If you have not installed a taxonomy update in over a year, the following may be of importance to you:

Information: Species added to the ABA North America Checklist in *prior* updates

We have added/renamed two new ABA area species due to actions by the AOU which are immediately accepted by the ABA:

Gunnison Sage-Grouse (split from Sage Grouse [now Greater Sage-Grouse])

Arizona Woodpecker (split - the US species is now Arizona Woodpecker, the Mexico species remains Strickland's Woodpecker)

. . . and have renamed **Oldsquaw** to **Long-tailed Duck**

Species deleted from ABA checklist

Loggerhead Kingbird (deleted by ABA)

Information: This is the Clements 2005 Taxonomy Update

It brings you up to date with the Clements changes as of 4/1/2005.

If you use the Shawneen Finnegan Nation Checklist Add-On, you must update to the 2005 version to have your range data match this taxonomy. Call Santa Barbara Software at 805-963-4886 to get the update.

Required Action:

Select the **Utilities | Update Master Checklist (from update file)** menu item, which checks that all species for which you have sightings are present in the new Master Checklist. (**If the menu item is not enabled** this update is not installed in your data set folder (such as C:\AVI4\JOHN), or that data set is not invoked in AviSys (automatically, or via the File menu if you have more than one data set). The file MASTER.UPD must be present in the data set folder.)

C: If You Have Exceptions

Action:

If you have sightings for species not in the new list, the affected species will be written to an exception file, **UPDEXCEP.TXT**, which will be presented to you for review and printing. By using the information in **Correcting Exceptions**, below, and the files **CLEMENTS UPDATE QUICK REFERENCE 2005.PDF**, **ALL CLEMENTS UPDATES.PDF**, **ABA 2003 Changes.pdf** and **Taxonomy5.pdf** supplied with this update, you should easily make the name changes in your Master Checklist which will allow the update to continue. Make the changes **only** for species called out as exceptions -- all other changes will be handled automatically by the update. See the **Neat Trick**, below.

Here's a Neat Trick:

If you have a lot of exceptions, it would be nice to have a copy of the NEW Clements taxonomy to refer to. Very often, if you have a bird in your data that doesn't match one in Clements 2005, and isn't in any of the documents, you can use the Latin name (*you do have that, right?*) of the bird to find it in Clements 2005 and see the new English name. So, to get a copy of Clements 2005 for reference, create a new, empty data set (*File | Add New Data Set*), name it CLEMENTS, invoke it, and run this conversion on it. You will have no exceptions because you have no sightings there. Now you can peruse the new taxonomy at will to find the things you need. (When you are done, you can delete the empty data set folder, CLEMENTS, using My Computer or Windows Explorer.)

D: Re-Run if Required

After you have made all required changes, re-run **Utilities | Update Master Checklist (from update file)** .

E: The Re-Start

When the first part of the update is completed successfully, you will be asked to re-start AviSys. After the re-start, when the subject data set is invoked (if necessary), AviSys will automatically update all your sighting records to match the new Master Checklist.

Required Action:

Delete all checklists from your checklist menu and re-add them. (Click the **Checklist** main menu item.) If you had custom checklists you marked yourself, see the following to restore them:

Restoring a Custom (User-marked) Checklist

Add the Place for the custom checklist you had backed up to your checklist menu. With it highlighted, click the **Mark** button. If you start a marking operation for a checklist, and there are any files with **.CLB** extensions in the current data set, you will be asked if you want to load the checklist from a checklist backup file. If you respond Yes, you can select the backup file in a File Open dialog, and it will be used to load the checklist. If there are any birds in a backup file that are no longer in your Master Checklist, an exception file is written for your information

Required Action:

Then select:

Utils | Rebuild Sighting File Indexes
Utils | Reindex Subspecies Data
Utils | Create World Bandcode Files.

You are now done. Your data set has been updated to include the latest AOU updates (*not sequence changes*) and Clements World Checklist Supplements as of 4/1/2005. Your Subspecies data and NA and World Bandcode lists have been updated.

Also, your data set is ready for the **Shawneen Finnegan World-Wide Nation Checklist Add-On** (2005 version) available from us (or from SBSP if you just need an update) and will match its species list exactly.

If you have multiple data sets:

If you have more than one data set, you need to repeat the above update procedure, steps A through E, including backups, for all your bird (not other critters) data sets.

Correcting Exceptions

If the Master Checklist update produces exceptions that you have to correct, it's likely the problem species are in the list, below or in **CLEMENTS UPDATE QUICK REFERENCE 2005.PDF**, **ALL CLEMENTS UPDATES.PDF**, **ABA 2003 Changes.pdf** and **Taxonomy.pdf**. You need to make changes **only** for species called out in the exception report -- those are species for which you have sightings but which are not in the new Master Checklist. ***The update facility does not make arbitrary decisions about re-assigning your sightings --- that's just too dangerous for a cold-hearted program to do --- you need to be in control of that kind of activity.***

Deletions

For deletions (which are really lumps, changes to another species), using **Ctrl-F3**, or **Utils / Save Species for Edit**, load the new replacement species in the species edit menu. Then, using **List Recs**, list all the records for the species to be deleted and edit them to the replacement species. If there are a lot, see the manual for **Mass Edit**.

Name Changes

For name changes, use **Edit / Edit Species/Family Name** to edit the old English name to the new English name. (Don't worry about the Latin name -- the update facility takes care of that.)

Splits

For splits, the best strategy is to rename the old species to the new species that represents the majority of your sightings, using **Edit / Edit Species/Family Name**. **You don't need to actually do the split** -- the update facility will take care of that. After the update, you can redistribute your sightings among the other new species, if necessary. You might have to examine field guides, etc., to determine which sightings go to which species. Also, see the file **AOUSPLIT.WRI** supplied with this update.

The **OLD** Clements Checklist Supplements are in the 1995, 1996, 1997 and 1998 **ABA Big Day List** reports. (See ABA Sales for copies.) ***This document covers only likely problem birds for the update -- it does not cover entire supplements.*** However, the automatic update you are running installs all those supplements.

If you have unresolvable problems with a species, send us a note via EMail at <support@avisys.net>. Please don't use the 800 number for these problems. **The following information is for *very old* updates, but may be of help to people who have not updated their taxonomy for a long time.**

1999 and Later Changes

These changes, as well as all others which make up the Clements 2000, 2001, 2002, 2003, 2004 and 2005 taxonomy, can be found in the documents in the folder where you installed this update:

CLEMENTS UPDATE QUICK REFERENCE 2005.PDF
ALL CLEMENTS UPDATES.PDF
ABA 2003 CHANGES.PDF
SPLITS.PDF
NEWNAMES.PDF
LUMPS.PDF
AOUSPLIT.PDF

Required Action:

After you have made any corrections, return to paragraph D, above.

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