

# Cornell/Clements 2014 Taxonomy Update General Instructions

## September 2014 Update

**(Print this -- you must follow ALL of these instructions)**

### Your AviSys Version:

**Version 6 users:** please update to the most current lettered version, 6.00M, or later, from our web site, [www.avisys.net](http://www.avisys.net), BEFORE installing this update. (To check your copy: Help | About AviSys 6)

If you have an older version of **AviSys 4**, please install the program update to Version 4.58D, available on our web site (This update won't work with older releases), or upgrade to Version 6, before performing this update. If you are using **Version 5**, please update to the latest version, 5.00F, or upgrade to Version 6.

**NOTE:** While all prior AviSys taxonomy updates had been applicable for prior versions of AviSys (4.5x and 5.x), this update presents some problems that cannot be resolved in those older versions:

- **AviSys Hot Keys and Jump Tables work with family names in most cases. In this update there have been so many family name changes that, as a result, Jump Tables and Hot Keys in Versions 4.5x and 5.x will not work with this taxonomy. North America Band Codes are similarly degraded. If you use those facilities, you will want to upgrade to the latest version of Version 6. Correspondingly, if you upgrade to Version 6 you will want to install this taxonomy update.**
- **In this taxonomy, Cornell has implemented a significant change in subspecies handling. There are now subspecies "groups," which allows you to record a sighting of a subspecies "group" where you are uncertain of the exact subspecies but where you know the bird falls within one of the subspecies groups. For example, you can record a Dark-eyed Junco as a member of the easily identifiable "Oregon" group, even though that group contains seven subspecies. Later study of range or descriptive data could allow you to define the subspecies more specifically --- see the Cornell data example of just one group, below. (*The Dark-eyed Junco species consists of 14 subspecies in seven groups.*) All this improves your opportunities to accurately "escrow" subspecies in anticipation of elevation of subspecies to species level. As a result of this change in subspecies data, subspecies implementation in legacy AviSys versions 4.5x and 5.x will be inaccurate and confusing. If you use subspecies, you will want to upgrade to Version 6.**

group	<i>Junco hyemalis</i> [oreganus Group]	Dark-eyed Junco (Oregon) ☒	
subspecies	<i>Junco hyemalis oreganus</i>		Coastal se Alaska to cent. Br. Col.; > to cent. California
subspecies	<i>Junco hyemalis montanus</i>		Interior Br. Col. and sw Alberta to e Oregon, w Montana, c Idaho
subspecies	<i>Junco hyemalis shufeldti</i>		W slopes of coastal mts. from sw British Columbia to w Oregon
subspecies	<i>Junco hyemalis thurberi</i>		S Oregon to mts. of San Diego Co. and s Nevada; > to n Baja, sw N Mex.
subspecies	<i>Junco hyemalis pinosus</i>		Coastal ranges of California (San Francisco to s Monterey Co.)
subspecies	<i>Junco hyemalis pontilus</i>		Mountains of n Baja California (Sierra Juárez)
subspecies	<i>Junco hyemalis townsendi</i>		Mountains of n Baja California (San Pedro Mártir)

**\* As a result of all the issues enumerated above, for complete function you will require AviSys Version 6.00M or later (In AviSys: Help | About AviSys). If you already use Version 6, you can download and install the latest update free of charge from our web site. While users of 4.5x and 5.x cannot use the functions impacted by this taxonomy update (Subspecies, Hot Keys, and Jump Tables, and degradation of Band Codes), they can still update the taxonomy and have access to most operations. While we have a long history of retaining full function for our legacy users, as old as 17 years ago, it has proven impossible this time. (In any case, legacy users should study the Version 6 upgrade web page to see the dozens of significant feature and function changes in the new version. <http://www.avisys.net/ANNOUNCE6.HTM> and <http://www.avisys.net/UPDATE6.HTM>)**

## Your Current Taxonomy:

If you are at Clements 2013 (approximately 10,233 species) you are ready to install.

**OTHERWISE**, if you are at . . .

1. at **Clements 2005** \*\* (approximately 9923 species in World mode) **OR** . . .
2. at **Clements 2007** \*\* (approximately 9937 species in World mode) **OR** . . .
3. at **Clements 2008** \*\* (approximately 9881 species in World mode) **OR** . . .
4. at **Clements 2009** \*\* (approximately 9911 species in World mode) **OR** . . .
5. at **Clements 2010** \*\* (approximately 9984 species in World mode) **OR** . . .
6. at **Clements 2011** \*\* (approximately 10070 species in World mode) **OR** . . .
7. at **Clements 2012** \*\* (approximately 10153 species in World mode) **AND** . . .
8. have split the **Blue Grouse** (done in prior Clements 2007), split the **Winter Wren**, split the **Whip-poor-wills**, and split the **Black Scoter**.

. . . you are ready to install this update.

**\*\* “How do I know if I already have Clements 2007 or 2008 installed?”** If you have the species **Cuban Black-Hawk**, and did not add it manually, you already have 2007, **at least**, installed. (There is no harm installing it twice.) If, in NA mode, the list starts with **Ducks**, etc., you already have Clements 2008 (**at least**) installed. (These updates are **CUMULATIVE**; if you do 2011, you also get 2007, 2005, etc... )

If you are at a taxonomy older than 2005, we highly recommend that you first install Clements 2005, available on our web site, before attempting this update. While this 2014 update will work on older taxonomies, the documentation regarding the hundreds of species changes in 2005 is provided in that update and is vital to editing your sighting records.

**In other words, YOU DON'T HAVE TO INSTALL ALL THE BACK LEVEL UPDATES**—you can go directly to Clements 2014. **However**, if you have a lot of sightings, and a very old taxonomy, it can be a good idea to start with one of the older taxonomy updates.

## **Splits You Must Do, If You Haven't Already**

For the **Blue Grouse**, after updating to Clements 2005 or later, go to <http://www.avisys.net/Blue%20Grouse.htm> and perform that quick update.

For splitting the Winter Wrens and Whip-poor-wills, go to <http://www.avisys.net/WRENS.HTM>

## **Some 2013 Changes That May Be Important for You**

**Barolo / Little Shearwater Split:** As a result of a split, the Little Shearwater is considered to not have been recorded in the ABA Area. All ABA Area sightings are now considered to be Barolo Shearwater sightings. The Barolo Shearwater is in the ABA checklist and the following state checklists: MA, SC, NS

**Sage Sparrow Split:** The Sage Sparrow has been split into the Sagebrush Sparrow and Bell's Sparrow. Currently (*and still under examination*) the range for Bell's Sparrow is portions of coastal and interior California and possibly parts of southern Nevada. All remaining records are considered (for now) to be of Sagebrush Sparrow. This is a very complex study; expect it to change almost monthly and consult ABA documentation and various Internet facilities for (let's hope) more clarity.

## **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**, **Utils | Restructure Sighting File**, 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 or Windows file system problems

If you have trouble, do **NOT** back up over an existing backup—use fresh media, preferably a flash or external drive.

## Very Important Concepts:

Because AviSys would not dare to change any of your sightings automatically (the risk of huge error is just too great), this update facility scans your current sightings and produces an “**Exception**” report from which you can make sighting record changes yourself, with the assurance that a machine has not concocted some assumptions and made serious mistakes with your data.

However, the **Exception** report lists **ONLY** species for which you have sightings and which are not in the new taxonomy. **You need to study the documentation** to see if there are other changes that affect your data.

When there are complex changes, such as splits and lumps, AviSys can’t tell if any of your sightings were involved or not. Therefore, **you need to study the documentation** included with this update to determine if you need to address such complex changes manually. That work is best done after this update procedure is completed --- you will then have a complete 2014 taxonomy to work with. **Clements 2014 Updates and Corrections.PDF** and the Excel spreadsheet, **Cornell-Clements 2014 Spreadsheet.xlsx** will be most helpful in this research. Please reserve some time to get this update done properly.

**Most one-for-one name changes (not splits and lumps) are handled automatically during this process.**

Where you see the eight headers, “**Required Action**,” **they mean just that; REQUIRED; ALL OF THEM**—check them out to see if you need to perform the listed action—**92 percent of our past support calls** for taxonomy updates have been because those paragraphs were ignored and/or the complete update was not performed.

## 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 flash drive or external hard drive. (**Remember**, to back up to CD, **which we advise against**, 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 media you normally use. **See our web site <http://www.avisys.net>** for a link on the first page to **Some important new thoughts on backup options**.

\*\* 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.

## Special Situation

**If you have birded in Cambodia (Kampuchea)**, and have “*Kampuchea*” in your Places | Nations table instead of “*Cambodia (Kampuch)*,” go to **Cambodia Operations** at the bottom of this document. Return here when you are done there.

## B: The First Pass (with exceptions, you will need to repeat this)

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### **Required Action:**

Please study the document ***Clements 2014 Updates and Corrections.PDF*** which was presented when you installed this update. If you missed it, and are using Version 6, it is available at **Utilities | View User Adobe Acrobat PDF Documents**.

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### **Information: This is the Cornell/Clements (September) 2014 Taxonomy Update**

It brings you up to date with the Cornell/Clements changes as of September 2014.

**If you use the Shawneen Finnegan Nation Checklist Add-On**, you must update to the 2014 version **after** this update to have your range data match this taxonomy. Call Santa Barbara Software at 805-963-4886, or visit <http://www.birdbase.com>, to get the update.

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### **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 facility is not installed in your data set folder (such as C:\AVI6\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 and is placed there when you install the update facility properly. Go to <http://www.avisys.net/upg14.htm> if you need to reinstall the update.

## C: If You Have Exceptions

### **Required 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. Go to **Correcting Exceptions if Necessary**, below, and using those instructions and the files ***Clements 2014 Updates and Corrections.PDF*** and the Excel spreadsheet, ***Cornell-Clements 2014 Spreadsheet.xlsx*** supplied with this update, you should easily make the sighting record changes, 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. **After making corrections as necessary, return here.** Also, see the **Neat Trick**, below.

## D: Re-Run if Required

After you have made all required changes, re-run Utilities | Update Master Checklist (from update file). **If you didn't miss any required changes** you will not see an Exception report and you can continue at E, below. Otherwise, you will need to continue working on exceptions. **IMPORTANT: This update will NOT complete until you have corrected ALL exceptions and run Update Master Checklist WITHOUT an exception report.**

## 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:**

**Do a restart of AviSys *ONE MORE TIME*.** This action reinitializes the ABA Area NA checklist (NA mode) to ensure that the latest ABA list is correct. That list will be as of July 2014.

**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 each of these in sequence:

**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 Clements World Checklist as of September 2014. Your Subspecies data and NA and World Bandcode lists have been updated. Further, the latest state and province checklists have been installed. You should have 10,307 species in World Mode and approx. 983 in NA Mode. *AviSys does not include extinct species, except for North America; the world number will differ from that published by Cornell.* If you subscribe to the **Shawneen Finnegan State/Province Checklists**, you will be automatically up to date as of November 2014 after installing that update from the newsletter.

Also, your data set is ready for the **Shawneen Finnegan World-Wide Nation Checklist Add-On** (2014 version) available from us (or from SBSP if you just need an update) and will match its species list exactly. *After that update, be sure to copy the new RANGES.LST file from BirdArea to your AviSys data set folder(s).*

**If you have multiple data sets:** If you have more than one bird 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.

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## **Correcting Exceptions, if Necessary**

If the Master Checklist update produces exceptions that you have to correct, it's likely the problem species are in **Clements 2014 Updates and Corrections.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.***

### **Here's a Neat Trick—Highly Recommended:**

**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 2014, 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 2014 and see the new English name. So, to get a copy of Clements 2014 for reference, create a new, empty data set (**File | Add**



New Data Set), name it TEST2014, invoke it, and run this conversion on it. You will have no exceptions because you have no sightings there. Now you can invoke that data set and peruse the new taxonomy at will to find the things you need. (When you are done, you can delete the empty data set folder, TEST2014, using My Computer or Windows Explorer.)

### 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. Actually, if you allow it when you first run the update, any one-for-one name changes are automatically made to the Master Checklist, in which case any affected sighting records will reflect the new names. **(Don't worry about Latin names -- the update facility takes care of that when it completes.)**

### 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 **In the case of complex exceptions**, below.

### Elevations from Subspecies

You should study the **Clements 2014 Updates and Corrections.PDF** to see if any of your sighting records are of species where there has been an elevation of a subspecies to a new species, in which case you can treat the correction like a split or name change.

**In the case of complex exceptions**, where the locations of sightings might determine the corrections you make for splits and elevations, studying the update details and/or Cornell Excel spreadsheet, available at <http://www.birds.cornell.edu/clementschecklist/download> (take the link to "Clements Checklist 6.9") is highly recommended. Ranges for most species and subspecies are provided. Note that the textual update document makes corrections that may not have been implemented in the spreadsheet. *If you don't have Microsoft Excel or a spreadsheet program that reads Excel files, Google "Excel Viewer" to get a viewing utility.*

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If you are updating from a taxonomy older than Clements 2005 (~9923 world species), again we recommend that you perform that update first. That update includes considerable documentation about older species changes. **If you have unresolvable problems with species names not found anywhere in this documentation**, do your research by using Google and Wikipedia first. Remember, a thousand birding tour guides use a hundred different reference books and checklists – and they rarely agree on nomenclature. Have the Latin name handy if you know it. If that fails, send us a note via EMail at <support@avisys.net>. Please don't use the 800 number for these issues, and **PLEASE** do some research first.

### Required Action:

**VERY IMPORTANT: After you have made all corrections, return to paragraph D, above.**

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## Cambodia Operations

**ONLY if you have birded in Cambodia** (Kampuchea), this section applies to you.

We have changed the name of the AviSys Nation *Kampuchea* to *Cambodia*(*Kampuch*), the more familiar name. As a result you need to perform some simple operations. This assumes that you have updated AviSys to 6.00M or later and that your Nations table has *Kampuchea*, **not** *Cambodia* (*Kampuch*).

### LIST YOUR KAMPUCHEA RECORDS

Click List Records. In the Place criterion, select *Kampuchea* from the Nations table. Click List. All your *Kampuchea* records are listed.

**Make a note** of how those records are assigned—you may have all of them assigned directly to *Kampuchea*, or you may have records assigned to lower level Places, such as *Angkor Wat*, linked to the State *Siem Reap*, linked to *Kampuchea*. *(If the linkage is not clear in the listing, remember that when you highlight any record its complete linkage is shown at the bottom of the dialog.)*

Close the list.

### ADD THE NATION CAMBODIA (KAMPUCH) TO YOUR PLACES TABLE

Click Places. Go to Nations. Click Add. With Eurasia selected, select *Cambodia* (*Kampuch*). It will auto-link to Eurasia and be added to the Nations table. *(This is the new Nation to which all Kampuchea records will be assigned.)* Close Places

### IF YOU HAVE LOWER LEVEL PLACES LINKED TO KAMPUCHEA

Re-link all *Kampuchea* Places (Sites, Cities, Counties, States) so as to eventually be linked to *Cambodia* (*Kampuch*).

For example, if you have *Phnom Penh* as an AviSys City, linked to the State, *Kandal*, and have the state *Kandal* linked to *Kampuchea*, then if you re-link *Kandal* to *Cambodia* (*Kampuch*), the job is done for any records assigned to Phnom Penh or Kandal.

### DO A MASS PLACE CHANGE FROM KAMPUCHEA TO CAMBODIA

This is for all records assigned **directly** to *Kampuchea*. Click Utilities. Select Mass Place Change. In Current Place select "*Kampuchea*". In New Place select *Cambodia* (*Kampuch*). Click Execute. Close the dialog.

### LIST YOUR CAMBODIA RECORDS

Click List Records. In the Place criterion, select *Cambodia* (*Kampuch*) from the Nations table. Click List. Ensure that all your Cambodia records are listed. Close the list.

### DELETE THE NATION "KAMPUCHEA" FROM YOUR PLACES TABLE

Click Places. Select Nations. Delete "*Kampuchea*". *(If deletion is refused, that means that you still have records assigned to Kampuchea. Revisit the steps above to correct those records.)*

If this does not work, email [support@avisys.net](mailto:support@avisys.net)

If you came here from Section A, Special Situation, above, return there.