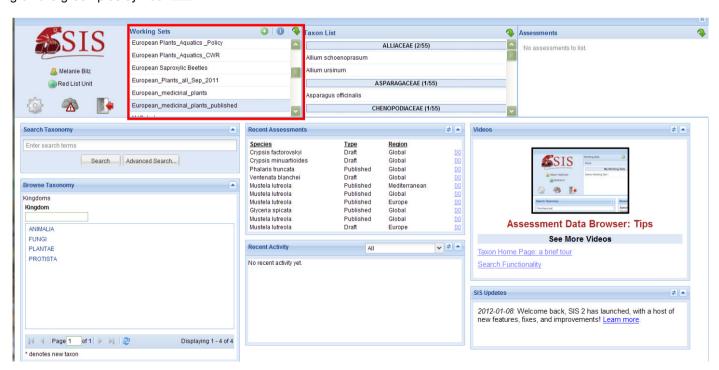
# SIS version 2.0 Manual – July 2014 – Plants



# How to find and enter species information in SIS

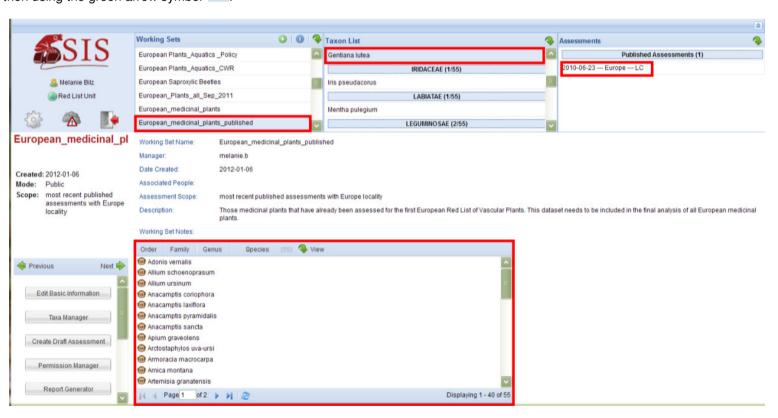
- 1. Go to <a href="http://sis.iucnsis.org">http://sis.iucnsis.org</a>. It is highly recommended to use **Google Chrome**, **Mozilla Firefox** or **Apple Safari** as the browser for standards compliance and performance.
- 2. Log in, entering your username (your email address) and your password.
- 3. Once you are logged in you will be taken to the SIS homepage. Click on the SIS frog logo (above) at anytime to return to this page. Click on the door symbol to log out. Updates and tips on using SIS can be found on the right hand side of the homepage.
- 4. You should see a working set in the top panel under "Working Sets". If you cannot see a working set, you might need to subscribe to it first by clicking on the green plus symbol .



5. **Browsing your working sets:** In the top navigation bar, click on the working set you want to view and all taxa in this working set will appear in the 'Taxon list', ordered by family. If you then click on a particular species, all assessments of this species in the scope of the working set will be shown in the right window. To open an assessment, double click on the assessment in this window.

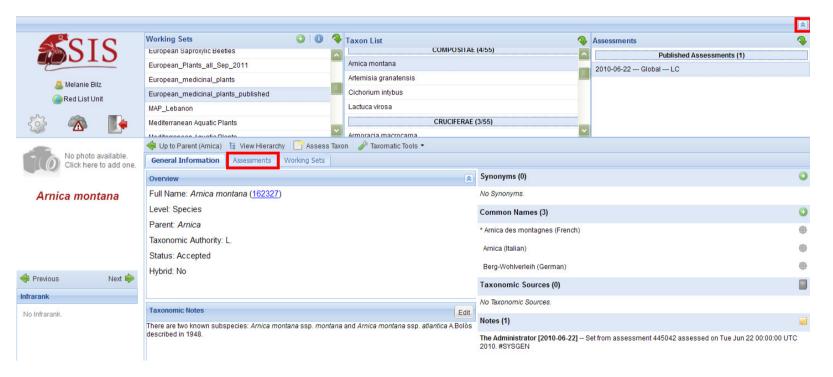
The list of taxa in the working set is also shown in the bottom window. Using the tabs at the top of this window you can navigate between a species, genus, family or order level view of taxa in the working set.

You can open an item from the working sets, the taxon list or the list of assessments by clicking on the item of interest (it will be highlighted) and then using the green arrow symbol .



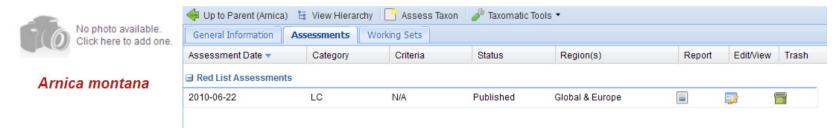
6. **Looking at a species:** Once you have double-clicked on a species you can see all of the information at species level. Here you can add synonyms, common names, or an image. To add a synonym or common name use the green plus symbol or common name use the cog symbol to add an image click on the camera icon on the left panel. Please be sure to enter the photo credit/copyright information and to tick the boxes to indicate the uses IUCN have permission to use the image for.

If you want more space on your screen you can minimize the working set browser by clicking on the double arrow symbol in the upper right hand corner.

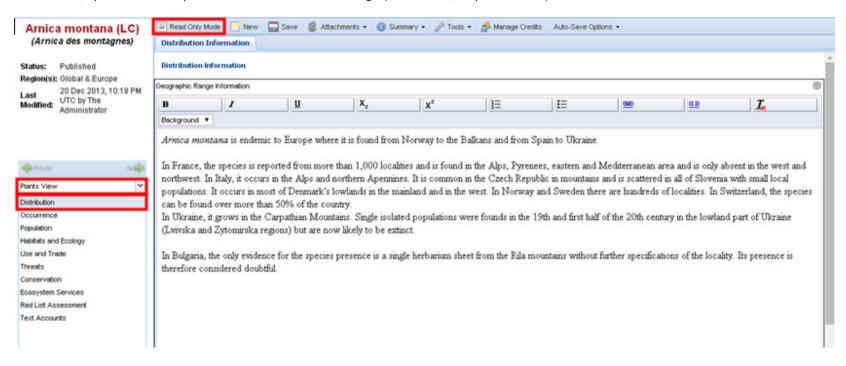


7. Looking at an assessment: To open an assessment you can either use the top panel (method described above) or the 'Assessments' tab.

Under 'Red List Assessments' on the 'Assessments' tab, you can see details of the assessment date, status and region, and the assigned Category and Criteria for each assessment. You can open an assessment to view and edit by clicking on the paper and pen symbol are also able to create a report of the assessment to save as a Word or PDF document, to send to a reviewer for example, by clicking on the report symbol.



8. **Editing an assessment:** You are now inside an assessment – the left hand side bar shows the status of the assessment (e.g. Draft, Published) and the regions it covers (e.g. Global, Europe). First you need to select the appropriate View (lower left hand side) – in our case this is the Plants View, which displays all fields required for a plant species assessment. Underneath the selected view you will see several headings (Distribution, Population, etc.). Click on these and the fields will open on the right. The different fields normally include a text field on top and then various classification schemes underneath – please scroll down on each page! Click on the bottom heading 'Text accounts' to see only the documentation text fields for each of the sections. All Fields View is an alternative view which displays all of the data and text fields in SIS, split across multiple tabs under the same headings (Distribution, Population etc.).



See below ('How to fill in SIS data fields' Section) for more detail on what information you should include in each field. If you find you are not able to edit the content of the assessment check that the assessment is in 'Edit Data Mode' by clicking on the button in the top left hand corner of the window. The button should read 'Read Only Mode' when the assessment is editable.

9. By using all your knowledge and the information published in different sources, please try to provide information for all the fields for each species. Please ignore the 'Ecosystem Services' section for the moment. The information collected will provide the basis to allocate a Red List

Category and Criteria to all the species. Make sure to save your progress before moving between sections, using the 'Save' button on the top tool bar.



#### For Regional Assessments (Points 10 and 11):

10. Please note that if the species is being assessed at the regional level it is better if the data focus as much as possible on the species in that region, rather than at the country level or outside that region.

#### Notes for the data collection process with several assessors:

11. If you work on a species that is not endemic to your country but occurs in other countries as well, please state your country name before your comments on distribution, population, threats, etc. e.g.

Poland: the species is common in the south where it occurs at more than 20 sites, population trend is stable Germany: only two localities in Saxonia included in a national park, population trend is stable.

Please **do not delete** comments that have been entered by other people – if you disagree with something then just write behind the text you disagree with, enter your name and the reason for disagreement, e.g. The species is found between 0 and 400 m asl. [Smith: new research according to Flower and Tree (2009) states that the species can also be found at 600 m asl]

The 'Changes' button on the 'Tools' menu on the top toolbar can be used to track changes made to the assessment.

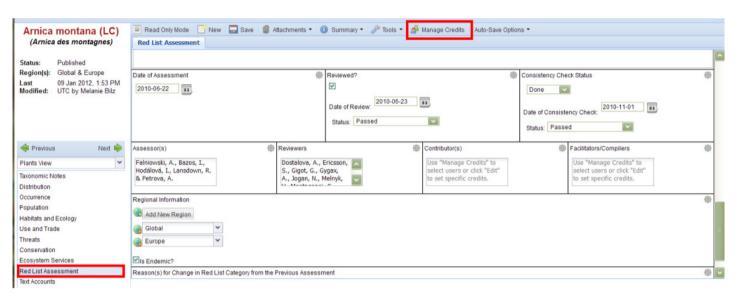
#### For Global and Regional Assessments:

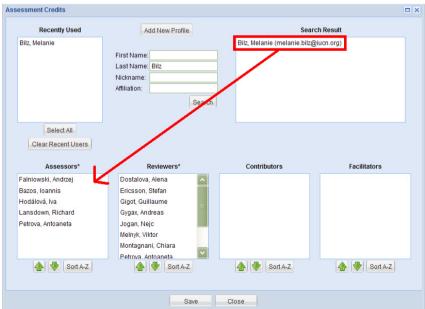
12. **Managing Credits:** Once you have added all of your information to the assessment, add your name as a **contributor or assessor**: Click on the 'Manage Credits' button below the working sets browser to add a name. A pop-up-window will appear where you can search for your name. Once your name appears under the Search Results, click and drag your name to the appropriate field (Assessors, Reviewers, Contributors, Facilitators). The system saves the recently used names and you can also drag and drop from there.

If one of your assessors/reviewers cannot be found in the database, please contact your project officer or the Red List Unit

13. Adding assessment/review dates: To add the date of assessment or review, go to the Red List Assessment section and scroll to the bottom of that page to enter the dates in the form YYYY-MM-DD or use the calendar function

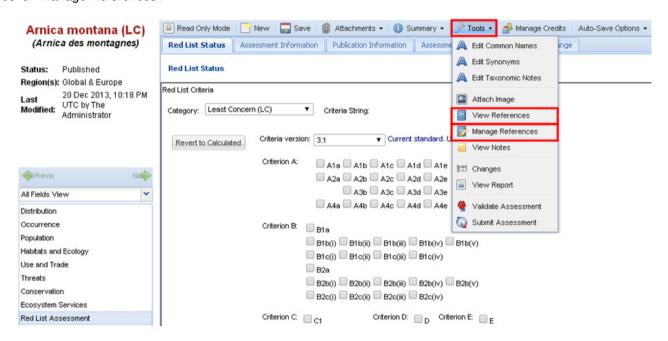
31. You can also see which users are already attached to the assessment.



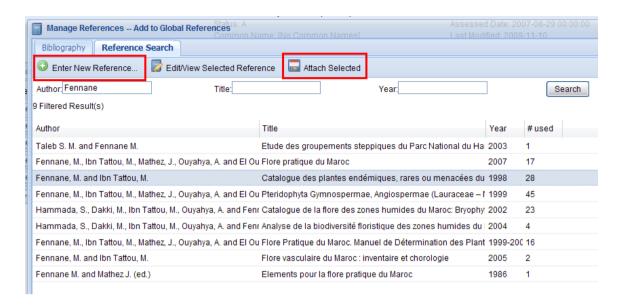


### References

14. **Viewing the bibliography:** Each assessment has a bibliography attached which you can view under 'Tools' through 'View References' or 'Manage References'.



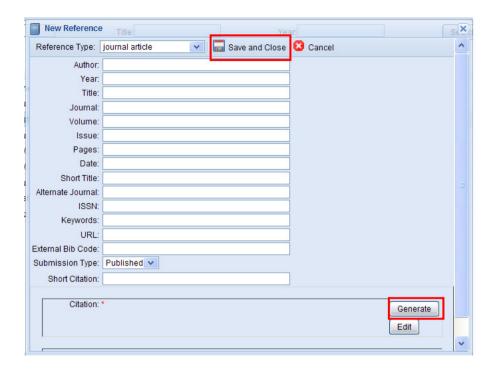
15. **Attaching a reference:** To add a reference to an assessment, use 'Manage References'. You need to **first check** if the reference is already in the system. For this you have to click on 'Reference Search' and enter the author, year etc. If the reference is already listed in the system you need to click on the reference to highlight it and then click on 'Attach Selected'. Now the reference will be visualised under the 'Bibliography' button



- 16. **Entering a new reference:** If the reference is not in the system, go to 'Enter New Reference'. Choose the appropriate reference type (e.g. journal article, book, electronic source) from the top scroll down menu. Enter the details of the publication. Once you have entered the information, scroll down the New Reference window to 'Generate' the citation before clicking 'Save and Close' at the top.
- 17. When entering authors names in a reference:
  - For all author names, use the format 'Smith, A.B.' (note that initials are separated by a full stop and no space).
  - Separate co-author names using a comma.
  - Use 'and' between the penultimate and last co-author names, with no comma before 'and'.
  - In general, where author names include text such as "de", include this at the front of the surname.
  - For example: Carnaval, A.C.O.Q., Puschendorf, R., Peixoto, O.L., Verdade, V.K. and Rodrigues, M.T.

**Important:** Once the reference has been entered, you have to search for it again, highlight it and click on 'Attach Selected' to make sure that it is linked to the assessment.

It is very important that every reference cited in the assessment is in the bibliography.



#### 18. Citing references in the text: References in the body of a text can be cited in two ways:

- As integral part of the text, e.g.: Flannery (1995) reports the Sulawesi Fruit Bat as common near villages on the Sula Islands.
- Behind the cited text in brackets: The Sulawesi Fruit Bat is common near villages on the Sula Islands (Flannery 1995)

Two authors are cited in this way, using 'and' and not '&' and without a comma between the author names and publication date: (Musser and Carleton 2005)

If a publication has more than two authors, cite only the first author and then use 'et al.': (Doherty et al. 2004)

If there are two or more references, separate them with a comma: (Hershkovitz 1983, Defler 2003)

If you have any doubts on how to enter a reference, please refer to the 'Documentation Standards and Consistency Checks for IUCN Red List Assessments and Species Accounts' - <a href="http://www.iucnredlist.org/documents/RL\_Standards\_Consistency.pdf">http://www.iucnredlist.org/documents/RL\_Standards\_Consistency.pdf</a>. Please be aware that this document is regularly updated.

### How to fill in SIS data fields

Summary documentation text is required for the topics listed below. The summary documentation text should be succinct but informative, and should be based on the most recent information available for the taxon. Please try to avoid one-word answers; when read together (e.g., on the Red List web site) the different sections should merge to tell a story summarizing what the taxon is, its Red List status, where it occurs, what threats it faces, what is being done or is needed to help the taxon. See examples in table on page 16.

- a. **Taxonomic Notes**. If there have been recent taxonomic changes or there are any current taxonomic doubts or debates about the validity or identity of the taxon, document these issues in the *Taxonomic Notes* section. This section is **not** to be used to simply copy and paste collection label notes into.
- b. **Distribution**. Summarize the current information available for the species and record it in the *Geographic Range* field. For taxa that are particularly sensitive to collecting or hunting, it is prudent to avoid providing information that allows people to see exactly where the species can be found, but a less precise summary should be provided.
  - If you have information on the extent of occurrence (EOO), area of occupancy (AOO) or the number of locations you can record it under this heading.
  - Ensure that the biogeographic realm is recorded (tick boxes underneath the text field).
  - EOO, AOO, number of locations and elevation limits can be recorded in the data fields below the text field.
- c. **Occurrence**. Select countries of occurrence, including sub-country units for threatened species, from the country list, remembering to record the presence (e.g. Extant, Extinct) and origin (e.g. Native, Introduced) of the taxon in each country and sub-country units. When using the guick-add function, please ensure you also select the appropriate country-level for each sub-country unit.
- d. **Population**. In the *Population Documentation* field, summarize the information available on the size and trend of the global population. Information about sizes and trends of subpopulations or trends in particular regions of the taxon's range can also be included in this section.
  - If there is no quantitative information on population sizes or trends, it is helpful to record whether the species is common, abundant, rare, etc. If there really is no information at all about the population, please note this.
  - Ensure that the current population trend is also recorded (selection box underneath the text field).
  - Population size and structure (total/subpopulations), whether the species is severely fragmented, continuing declines/extreme fluctuations in mature individuals and information on population declines can be input in to the data fields below the text field.
- e. **Habitats and Ecology**. Use the *Habitat and ecology information* field to write a summary account of the suitable habitats and ecological requirements. This does not need to be extensive; for example, it is not necessary to know the details of behavioural traits, etc. unless these are relevant to the taxon's status (e.g., it has a particular life cycle, growth pattern or behaviour that makes it vulnerable to specific threats).
  - Select all of the suitable habitats in the Selections for General Habitat Information section.
  - Ensure that the correct system(s) is recorded (e.g. Terrestrial, Freshwater, Marine) by ticking the appropriate box(es).
  - For plants, choose the appropriate plant growth form in the Selections for Plant Growth Forms section. If known, the 'Wild relative of a crop?' data field can be used to specify if the plant is a crop wild relative or not.

f. **Use and Trade**. Assessors are no longer required to provide information on use and trade of a species. However, this is recommended for any taxa that are utilized, including those that are legally or illegally hunted or collected.

Use the *General notes regarding trade and use of this species* field to write a summary account of the information available for any utilization and/or trade of the taxon (local, national and international trade).

If the species is not utilized or there is no information on this, tick the appropriate box at the top of the General Use and Trade Information page.

End Uses codes can be chosen from the Selection For End Use section.

On the Non-consumptive tab, tick the box if there is non-consumptive use of the species and write a short summary of this in the text box. Non-consumptive use is non-direct use of the species, e.g. cultural or spiritual importance, ecotourism.

On the Livelihoods tab, record the importance of the species to human livelihoods, following the Livelihoods classification scheme. Tick the 'No Livelihood Information' box if this applies.

g. **Threats**. In the *Threats Documentation* field, document the major threats affecting, or likely to affect, the taxon. Try to indicate whether these threats are historic threats that caused the population to decline or current threats affecting the population now, and whether they are likely to affect the population in future.

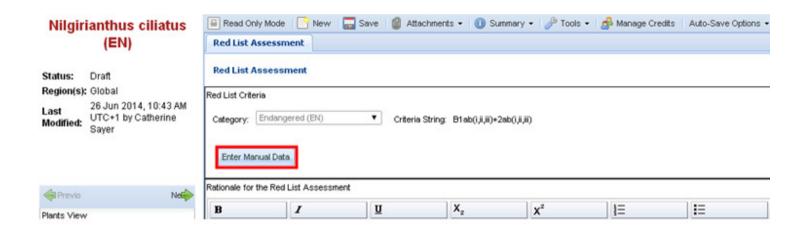
Often this text is used to inform the codes recorded in the Threats and Stresses Classification Schemes, therefore it is helpful to document as much detail about the threats as possible, including the main reason for the threat, scale of the threat, and the stress this places on the species. For example, if deforestation is the main threat affecting the species, explain what is driving the deforestation (e.g., large scale hardwood timber extraction for national and international trade, ongoing forest clearance for expansion of coffee plantations, etc.) and how this is affecting the species being assessed (e.g., removal of mature individuals and seeds from the wild population, removing suitable habitat, altering the habitat to the extent that suitable breeding sites are becoming increasingly scarce, etc.)

Threats to the species, with details of timing, scope, severity and stresses, can be chosen from the Selection for Threats section.

h. **Conservation**. Use the *Conservation Actions Information* field to document the conservation actions currently in place, and realistic actions needed to mitigate the threats causing declines (if any).

Conservation Actions and Research Needed codes can be chosen from the selection boxes, and details of In-Place Research, Monitoring and Planning can be entered. This is recommended but not required for an assessment.

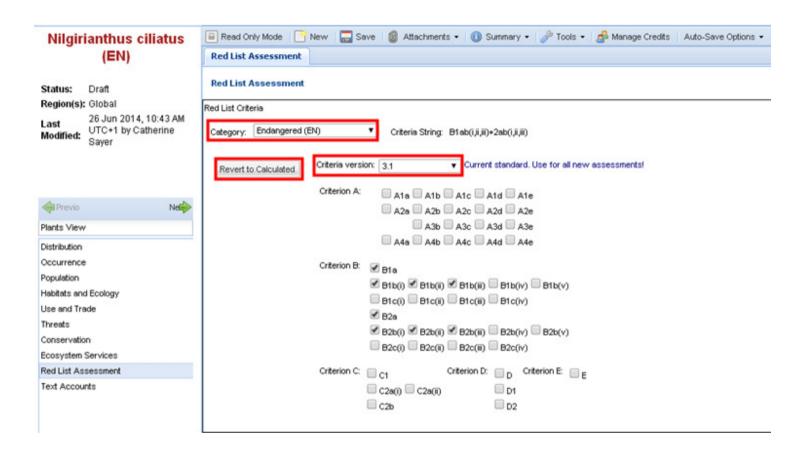
- i. **Ecosystem Services.** Leave this section blank.
- j. **Red List Assessment Red List Category and Criteria.** Enter the Red List Category and Criteria that the taxon qualifies for based on the data presented. There are two methods that can be used to do this:
  - Red List Criteria calculator SIS includes an expert system which compares data fields holding parameters related to the IUCN Red List Criteria against the criteria thresholds and automatically assigns a Red List assessment for that taxon. Assessors should keep in mind that if they wish to use the Red List Criteria calculator in SIS, then the data must be entered into the appropriate fields. SIS also includes a Criteria Factor View, which displays all of the data fields used by the Red List Criteria calculator; often it is easier to use that view to ensure all of the appropriate data fields have been completed for the calculator to work properly.



• Manual entry – Alternatively, the Category and Criteria can be entered manually. Select the Category from the drop down menu and tick the boxes next to all of the criteria and subcriteria which have been met at the highest category of threat recorded. Do not select criteria or subcriteria for taxa assessed as EX, EW, NT, LC, DD or NE.

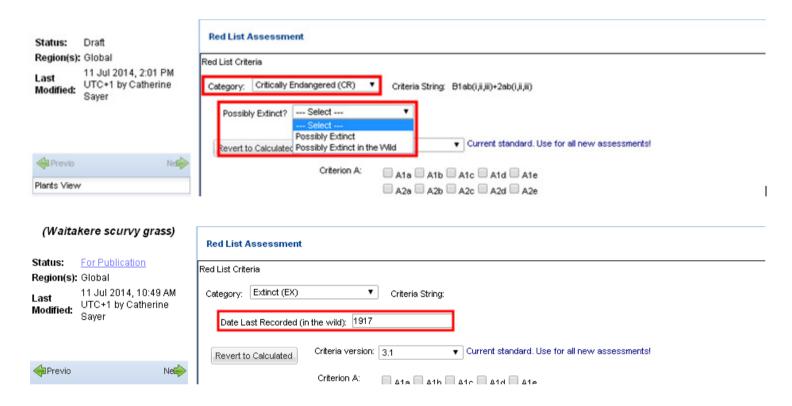
Important: Criteria version 3.1 is the current standard and should be used for all assessments.

To switch between these two methods, click the 'Enter Manual Data' or 'Revert to Calculated' buttons.



The Possibly Extinct (PE) tag can be assigned to Critically Endangered species that are likely already Extinct, but for which confirmation is required. If this applies, select the appropriate tag from the drop down box below the chosen category.

For taxa assessed as EX, EW, CR (PE) or CR (PEW), please enter the Data Last Recorded (in the wild) in the text box below the chosen category.



k. Red List Assessment – Assessment Rationale. Provide a rationale to justify the assessment in the Rationale for the Red List Assessment field. The rationale should not simply quote the Red List Criteria thresholds that are met (the criteria code already tells that story); instead it should use the key issues highlighted in the other documentation sections to summarize the reason why the taxon qualifies for the assigned category. The category should be mentioned

#### For Regional Assessments (Following Examples):

Example: European Assessments – Provide a rationale at the European and EU 27 levels to justify the assessment in the *Rationale for the Red List Assessment* field.

• If the category is the same at the European and EU levels:

European regional assessment: Vulnerable (VU) B1ab(iii)+2ab(iii) EU 27 regional assessment: Vulnerable (VU) B1ab(iii)+2ab(iii)

Genus species has a restricted range. It is known from 5-10 locations and has a total extent of occurrence (EOO) of *c.* 550 km². Its forest habitat is declining due to logging and the rapid expansion of agriculture and human settlements in the area. These threats are likely to continue as the area is favourable for agriculture and there is no protection in place for the habitats required by this frog. The species is therefore listed as Vulnerable at the European and EU 27 levels.

• If the category is different at the European and EU levels:

European regional assessment: Near Threatened (NT) EU 27 regional assessment: Not Evaluated (NE)

There is currently insufficient information available about the precise distribution, population size, structure and trend of *Genus species* to carry out a full assessment. However, it is very rare in Crimea where it is represented by no more that 10 small, isolated subpopulations which are under threat from tourism and recreation. It is therefore regionally assessed as Near Threatened as precautionary measure, approaching Criterion B.

It does not occur within the EU 27

• If the species is endemic to Europe:

Genus species is assessed as Critically Endangered because its extent of occurrence (EOO) is less than 100 km² and its area of occupancy (AOO) is less than 10 km². It has been recorded at five or six localities in France in the past but is now confirmed from only one locality which is threatened by tourism and recreational activities. Although it is possible that this is due to the species being a sporadic casual, it is suspected that there is a continuing decline in the AOO, the quality of the habitat and the number of mature individuals.

## For Global and Regional Assessments:

If criterion A or C1 are used in the assessment, please include the size of the population size reduction in the rationale rather than just stating the thresholds from the criteria. It is also helpful to indicate how this decline was measured (e.g. observed decline in total numbers, estimated from declines in trade stocks) and the time period over which this decline took place or is projected to take place. Generation length is required information for taxa listed as threatened under criterion A or C1. In SIS this information may be included in the Reduction pages in the *Population* section of the species account. The generation length should be included under the Life History information page of the *Habitats and Ecology* section.

If criterion B (or criterion D2 based on area of occupancy) is used in the assessment, please include estimates of the extent of occurrence (EOO) and area of occupancy (AOO) (and number of locations if used) in the rationale rather than just stating the thresholds from the criteria, e.g., "EOO <20,000 km²". It is also helpful to indicate the method used to estimate EOO and AOO (e.g., area within a minimum convex polygon (MCP) around all known sites of occurrence, MCP around all collection sites and extended to include potentially suitable habitat, MCP excluding large areas of unsuitable habitat, total area of river basins where the species is known to occur, AOO estimate from a 2x2 km grid overlay, etc.). In SIS, this information may be included in the justification fields on the AOO and EOO pages in the *Distribution* section of the species account, along with the EOO and AOO estimates.

If criterion C or D are used in the assessment, please include the actual population size (number of mature individuals) or subpopulation sizes, rather than just stating the thresholds from the criteria. In SIS this information may be included in the *Population* section of the species account.

- If criterion E is used, please include the data, assumptions, structural equations and Population viability model if used.
- I. Red List Assessment Re-assessments. If the assessment is a re-assessment, a reason for change in the Red List Category of the taxon needs to be provided. Scroll down to the bottom of the 'Red List Assessment' page to find this data field. If there is no change in the Red List Category, select 'No change' on the drop down menu and select a reason from the second drop down menu. If there has been a change in the Red List Category select 'Genuine change' or 'Non-genuine change' from the drop down menu and a reason from the second drop down menu. See section 2.2.1 Transfer between categories of the User Guidelines (<a href="http://jr.iucnredlist.org/documents/RedListGuidelines.pdf">http://jr.iucnredlist.org/documents/RedListGuidelines.pdf</a>) for more information.

| Field name           | Preferred style  | Try to avoid   |
|----------------------|--|--|
| Distribution:        | Adelophryne baturitensis is known only from the Serra (or Maciço) de Baturité, in the State of Ceará, in northeastern Brazil.  | Brazil.  |
| Population:          | Until 1993, this frog was very common within its small range; often it was found at numerous localities. Between 1994 and 2003 the same sites were surveyed 34 times; not a single individual was found until in July 2004, when three individuals were recorded. It is suspected that the population is genuinely declining, but more research is needed to investigate the possibility of natural population fluctuations occurring. | Rare.  |
| Habitat and ecology: | Most specimens have been found in reasonably well-preserved closed forests in dry or moist leaf-litter on the ground, in bromeliads, and in stream margins. However, the species can also survive in shaded coffee plantations. It is a diurnal species that breeds by direct development, and it is likely that the eggs are deposited in wet spots on the ground.  | Streams. Forest.   |
| Threats:             | The major threat to this frog is extensive habitat loss across its range caused by logging, mainly for the timber trade, and to convert forest areas to agricultural land (large-scale plantations) and for urban expansion and tourist areas. The region's very good soils and favourable climate encourages agricultural expansion; the species cannot survive in the banana plantations that are rapidly taking over the area.      | Forest loss.   |
| Conservation:        | A. baturitensis is not known from any protected areas, and clearly there is a need for improved habitat protection at sites where this species is known to occur. Further survey work is needed to determine whether or not this species is experiencing a decline, or is undergoing natural population fluctuations.  | None.  |
| Assessment           | Adelophryne baturitensis has a restricted range. It is known from 5-10 locations in the Maciço de Baturité in northeastern Brazil, where its total extent of occurrence  | Vulnerable because EOO <20,000 km², <10 locations, and declining |

| rationale: | (EOO) is approximately 550 km². Its forest habitat is declining due to logging and       | habitat. |
|------------|--|----------|
|            | the rapid expansion of agriculture and human settlements in the area. These              |          |
|            | threats are likely to continue as the area is favourable for agriculture and there is no |          |
|            | protection in place for the habitats required by this frog. The species is therefore     |          |
|            | listed as Vulnerable.  |          |
|            |  |          |

For more information, please contact the Red List Unit, or refer to the following documents:

- Documentation Standards and Consistency Checks for IUCN Red List Assessments and Species Accounts: http://www.iucnredlist.org/documents/RL Standards Consistency.pdf
- IUCN Red List Categories and Criteria Version 3.1: http://jr.iucnredlist.org/documents/redlist\_cats\_crit\_en.pdf
- Guidelines for Using the IUCN Red List Categories and Criteria: http://jr.iucnredlist.org/documents/RedListGuidelines.pdf
- Classification schemes, with definitions, examples and guidance: http://www.iucnredlist.org/technical-documents/classification-schemes

For more examples please look at published assessments on the Red List website: www.iucnredlist.org

## **Useful tips for Mozilla Firefox**

- British English Dictionary: <a href="https://addons.mozilla.org/en-US/firefox/addon/3366">https://addons.mozilla.org/en-US/firefox/addon/3366</a> provides you with an automatic spell check in the SIS text fields
- **abctajpu** <a href="https://addons.mozilla.org/en-US/firefox/search?q=abctajpu&cat=all">https://addons.mozilla.org/en-US/firefox/search?q=abctajpu&cat=all</a> provides you with an international alphabet for accents, etc. Once installed it will appear when you right click your mouse in Firefox.
- If you hit F11 your Firefox browser bar will disappear and this will give you more screen space. Press F11 to regain the browser bar.
- By pressing the **Ctrl** key and using the scroll button on your mouse you can enlarge the screen/ zoom into the page—but careful, sometimes the system gets stuck or you can't see certain fields in pop-up windows then you have to login and logout again.
- SIS Troubleshooting: If you can't login to SIS or you can't see all the information you are supposed to see, such as regional draft assessments, try the following trick:
  - Log out of SIS
  - Go to Tools -> Options, select the tab "Advanced" and then "Network" under "Offline storage" click "Clear now". Then shut down the browser, start Firefox again, go to tools and repeat the same procedure (i.e. clear the cache again just to be safe) and then log into SIS as normal.