Conservation Designations Spreadsheet Guidance

This document provides additional guidance on the contents of the Conservation Designations spreadsheet. The spreadsheet contains several worksheets as briefly described below.

Master list

The "Master List" is, perhaps, the most important of the worksheets and is, in effect, a collation of different conservation lists combined into the same data structure, with each row being distinguished by a unique combination of "taxa" and designation. The term "designation" refers to any "badge" given to a species whether or not it has a legal standing. A taxon with ten designations will be represented by ten rows on the Master List. Note that the generic term "taxa" is in this context a more strictly accurate term than "species" because some of the listed entities are ranked as being either above or below the "species" level.

The Master List provides a flexible format, suitable for filtering data on a range of parameters. For example users can focus on:

- An individual species, *e.g.* Otter *Lutra lutra.*
- A taxonomic group, *e.g.* Lichen.
- A specific list, *e.g.* all UK BAP priority species.
- A type of legislation, *e.g.* species listed under the Habitats Directive.
- A type of designation, *e.g.* Critically Endangered.

Filters can be used in combination, *e.g.* to list all invertebrate species under the UK BAP, first select 'Invertebrate' using the 'category' filter, followed by "Biodiversity Action plan lists" from the 'reporting category' filter.

For more specialised searches you can use "custom filter", this enables you to search for items starting with or containing a search term. For example, if you want to search for all entries in the 'tern' genus – 'Sterna', then choose 'custom' filter, select 'begins with', and type 'Sterna ' into the text box.

Table listing the Master sheet column descriptions

Spreadsheet column	Explanation
Category	Broad taxon category *e.g.* 'mammal', 'invertebrate'.
Taxon group	A more specific catergory of taxon group, for example, 'marine mammal', and 'insect – butterfly'. These taxonomic groups have been derived from the National Biodiversity Network Species Dictionary groupings.
Recommended taxon name	This is the name of the taxon as it has been recorded within the preferred checklist identified in the NHM's UK species inventory.
	It is not necessarily the same as the name used on the published source (ie a red data book or a legislative annex).
Recommended authority	Authority of the Recommended taxon name as it has been recorded in the NHM's UK species inventory.
Recommended qualifier	Attributes/Qualifier of the Recommended taxon name as it has been recorded in the NHM's UK species inventory.
Recommended taxon version	Code for the taxon as recorded on the relevant preferred checklist on the NHM's UK species inventory.

key	Each combination of Recommended taxon name & Recommended authority & Recommended qualifier has its own Recommended taxon version key, which is unique for that combination.
Designated name	This is the name used on the published source. It is only shown where it is different to the 'taxon' column.
Common name	Common name where available. These may be replaced by preferred common names as recorded on the NHM's UK species inventory.
Source	This indicates where the information was obtained from, *i.e.* where the 'designation' has been published.
Source description	A more detailed description of the source, including authors, authority and further relevant information.
URL source	URL of the source, when available online.
Date designated	This is the date in which the designation was made.
Reporting category	Type of constituent list from which a designation comes under.
	For example, "Global Red list status", "Wildlife and Countryside Act 1981" or "Birds Directive".
Designation	It includes the appropriate schedule/annex/appendix that a species is on.
	For species listed on Red Data Books/Lists, the category is shown using its IUCN status.
Designation abbreviation	This is other way of coding the designation that, on some occasions, contains the reporting category and the designation.
Designation description	The description of the designation category
IUCN version	For Red Data Book listings this indicates whether the version of the IUCN criteria are pre 1994, 1994 or 2001.
Criteria description	This shows why that species has been assigned a designation.
	For example, ">20% breeding population in the UK".
	Note that this column is not filled in for all rows.
Comments	Comments on the provenance of the species and any constraints that may apply to the designation.
Reporting category sort order	Allows sorting the taxa designations by reporting category.

Summary for each taxon

This is a more compact presentation of the key information in the Master List and is most helpful if you want to quickly find all the designations associated with a particular taxon. Each taxon is shown on a single row, with different columns for the reporting categories. Thus a taxon with ten designations will be represented by just one row on this worksheet. The version of the spreadsheet published in April 2014 has included taxa assessed as "Least Concern" and "Not Evaluated" for Red Lists based on the 2001 IUCN guidelines. A new spreadsheet has been made available in August 2014 removing an incorrect designation included in the April version.

The "designation abbreviation" is written in cells where a taxon has a designation under a particular reporting category. This abbreviation is designed to clearly and compactly show relevant information, for example, 'RedList_Global_post94:CR', found under the Global Red

List column, shows that this particular taxon was assessed as "Critically Endangered" using post 1994 assessment criteria.

If you only wanted to look at species with a certain designation in a reporting category (for example all "Vulnerable" taxa on the Global Red list) then this can be done by filtering on the reporting category column.

Lists by taxon group
This sheet is a pivot table based on the master list. You can use this sheet to get simple lists of all taxa in a particular taxon group that have a certain designation(s), for example, all mosses that are nationally rare or nationally scarce.

Updates to spreadsheet
This sheet includes details of updates and amendments made to the spreadsheet of Conservation Designations for species.