



Instructions for submitting CREW data to iNaturalist – Website Version

Background

The main purpose of the CREW programme is collect population and threat data of South Africa's threatened plants. Through time this progressed from data recorded on paper forms to excel spreadsheet that were emailed to the CREW offices. The technological advancement in interactive websites (like iSpot and iNaturalist - iNat), smartphones and their apps, has created new opportunities to streamline the process of collecting our citizen science data. These advancements appeal to a wider range of citizen scientists and makes data recording fun and efficient. CREW members have helped with various pilot projects on iSpot and iNat to test data submission online and these have been successful, but also a bit complicated on not everyone is keen to use it. The SANBI Threatened Species Unit has now reviewed our past efforts, and decided that the problem was that we were expecting too much data: a much simpler, more focussed approach might result in more participation. And it will simplify CREW data management if we focus on the core data that the Red List team use most often.

Please find instructions to the new data entry system on iNaturalist. I'm sure the new system will be a huge success and will take the CREW programme to a new and improved level of operation.

Please note that conventional forms are still welcome, as is the ability to submit these on iNat. But we will be encouraging all CREW members to submit the new streamlined data via iNat.

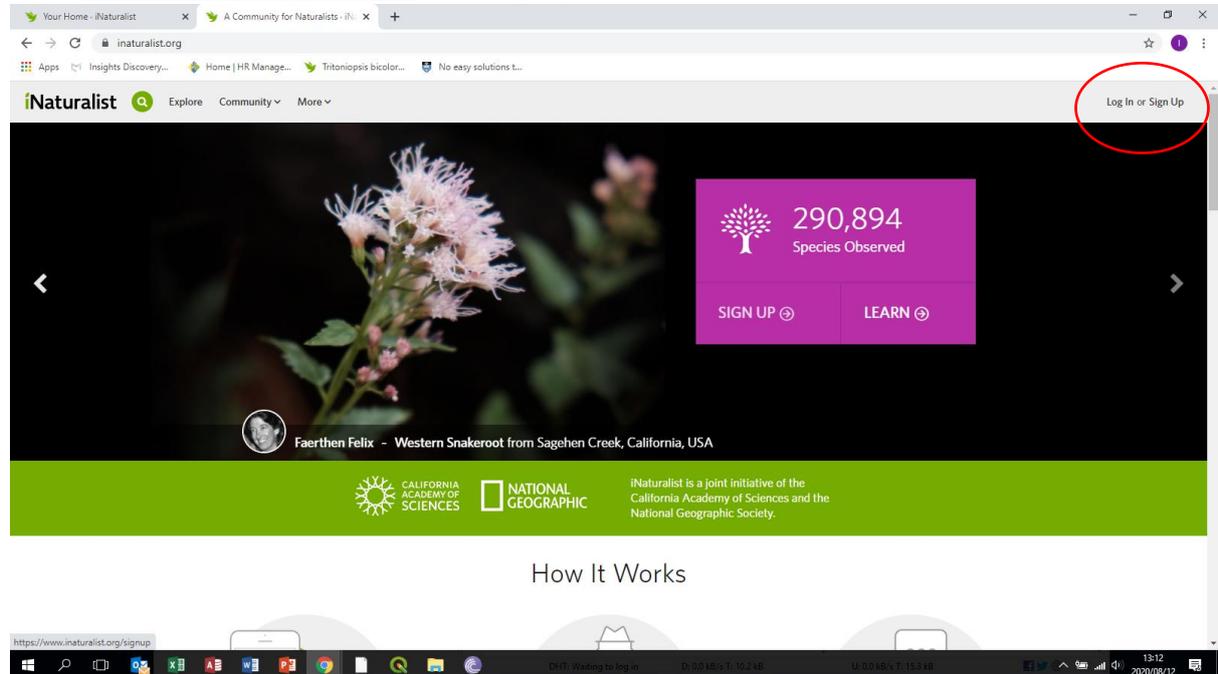
The CREW programme is still committed to training volunteers on plant identification, engaging with conservation agencies to conserve and protect areas where threatened plants occur, creating awareness about threatened plants, implementing the National Plant Conservation Strategy and growing the network of CREW citizen scientists across the country. And moving forward with the times to make participation easier, faster, more efficient and more fun.

Submitting data via iNaturalist

Step1: Join iNaturalist

If you are not already an observer on iNat, then create your profile on iNat:

Go to <https://www.inaturalist.org> and “sign up”!



If you would prefer to use the smartphone apps, you still need to sign up, but be careful to use the same account on both the web and app versions: so your user_name and password will be the same on both the web and the app.

CREW will be arranging a number of introductory courses to help citizen scientists familiarise themselves with iNat and the iNat apps.

Here are some tips meantime – please go to your “Account settings”:

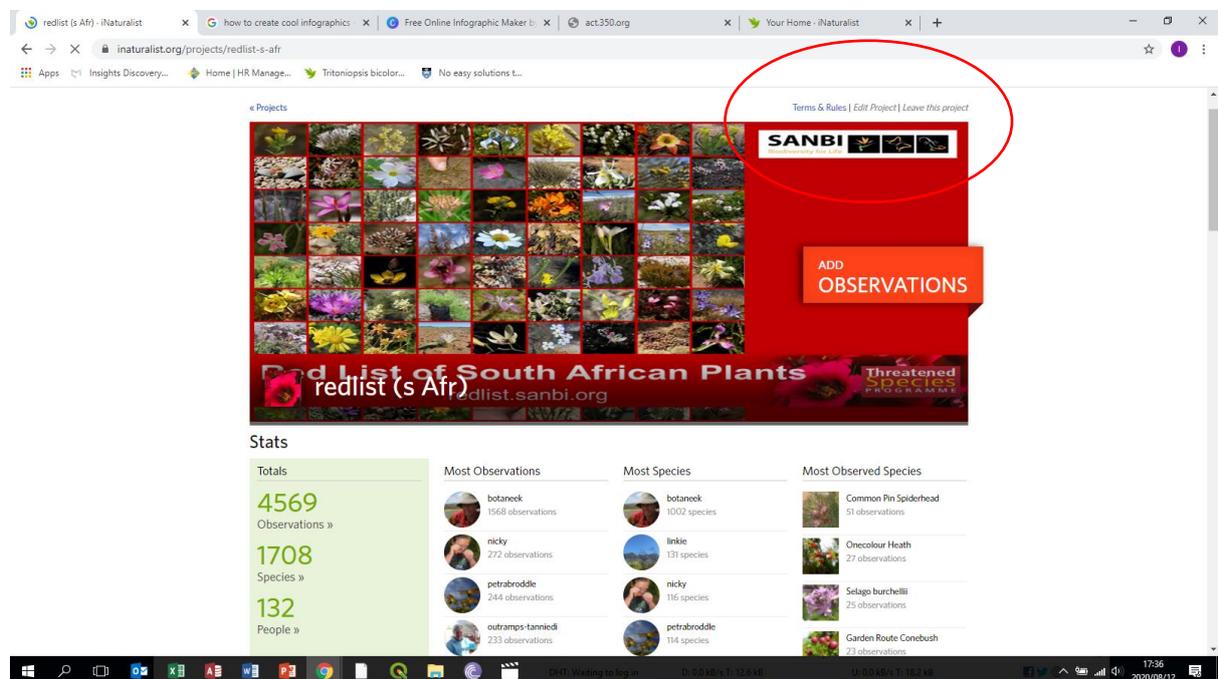
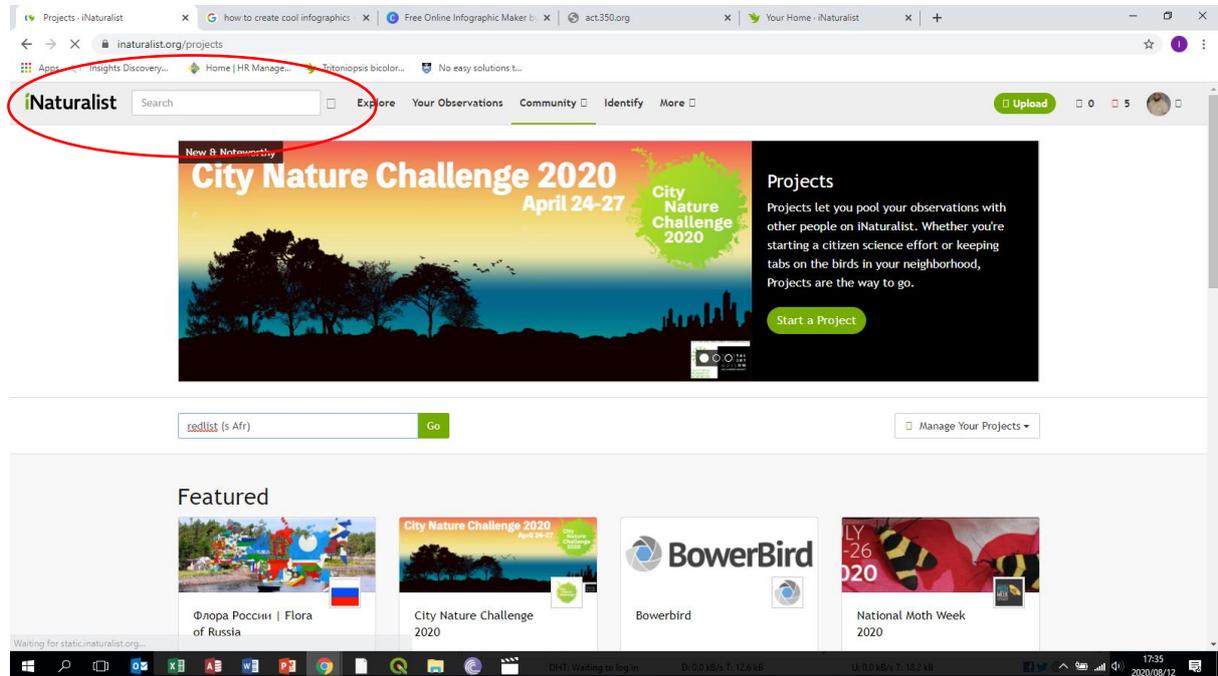
- Fill in the “Tell everyone a little about yourself” section: just a brief note that you are participating in CREW and what your specific interests are.
- If you want common names, we recommend you set the Language to English and the Names Place to “Southern Africa” – if you see weird names they are probably the horticultural trade names used in America, and you need to use our names. If you don’t like them, you can switch them off here.
- You can also decide on what copyright restrictions you want to place on your photographs. This is especially important if you rely on your photos to augment your income.

This is a once off step. In future merely “Log in” (set your computer to remember your name and password so that this is automatic).

Step2: Join the redlist (s Afr) project.

You can search for the project using the search box in the menu bar (it may be hidden by a magnifying glass: click on the magnifying glass to open to the box).

Type in “redlist (s Afr)” and click on the “about” link and it will take you directly to the project



To join the project, click the “Join this project” option on the top right.

You will be given a summary of the project and at the bottom are some questions.

Please fill out the following options:

Other

Receive updates from this project

Receive updates about this project on your dashboard and in the daily updates email.

Do you want to make your private/obscured observation coordinates visible to the project curators?

Yes, but only if I add the observation to the project myself.

Yes, no matter who adds the observation to the project.

No.

Note: You can also choose to share the hidden coordinates of observations in this project on a case-by-case basis. These are just the defaults for new observations added to the project.

This step is important as it allows the Red List team to see the locality of any observations that you might want to hide (“obscure” in iNat parlance) from poachers, collectors or other people. We need the precise locality data to make the Red List Assessments. Note that you do not normally need to obscure observations: they will be automatically obscured if they are on the Sensitive Species list.

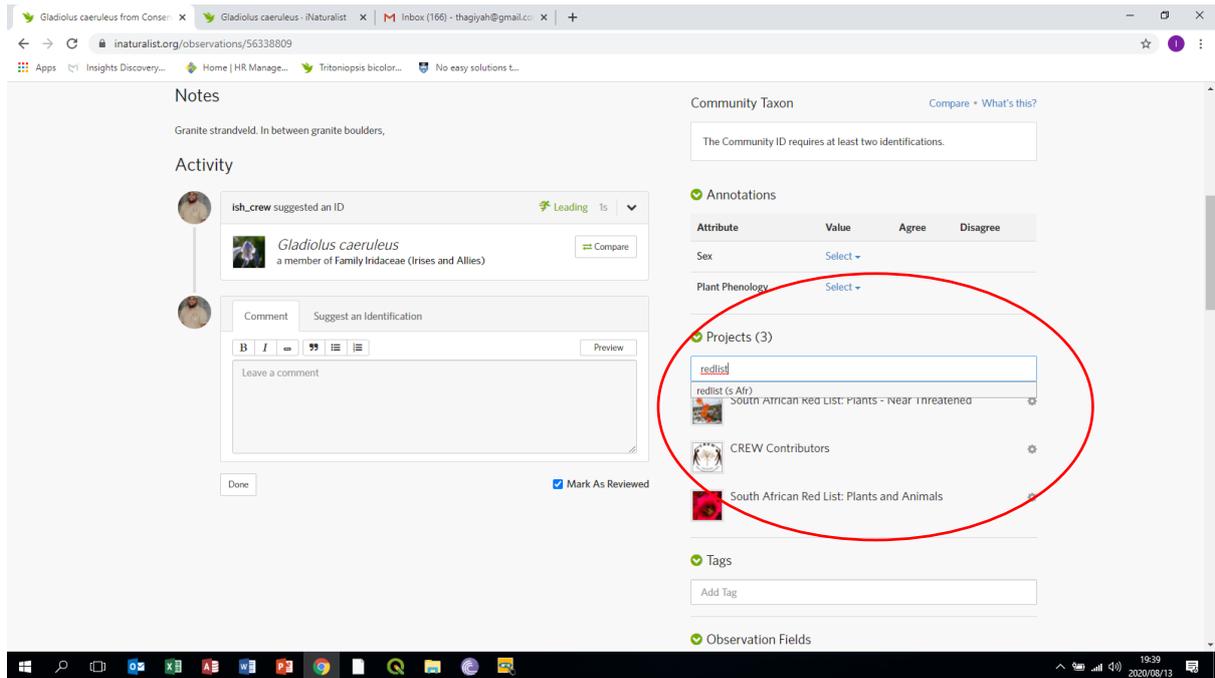
This is a once off step. Once you have joined the project (and any others) they appear in your basket of projects – you might want to join several – for you to use whenever you need to. But for CREW, just the “redlist (s Afr)” project will need all your needs.

Step3: Adding CREW data to observations for species of conservation concern

Whenever you add an observation, you can add CREW data using the Projects panel. Because these data are specific to each observation, you cannot bulk add it: do it one by one.

You can also fill it in at a later stage. For instance, you might not have known it was a RedList species when you observed it, but now it has been identified and the CREW office may ask you to fill in the data – as best as you can remember it.

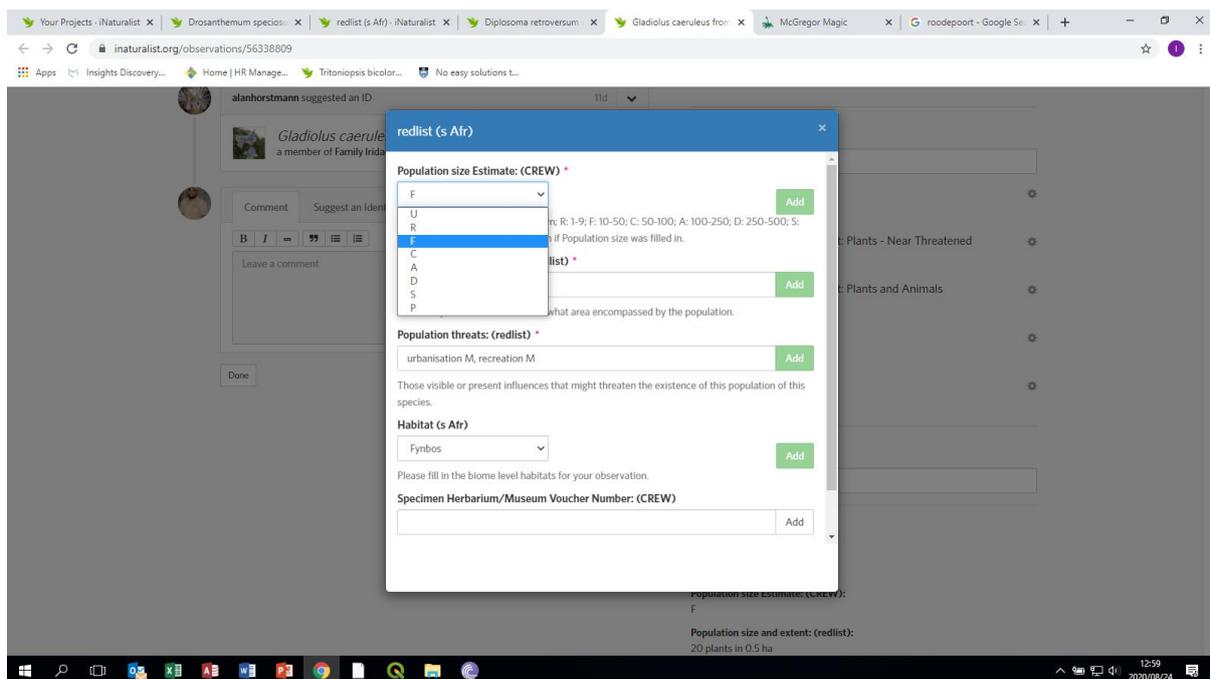
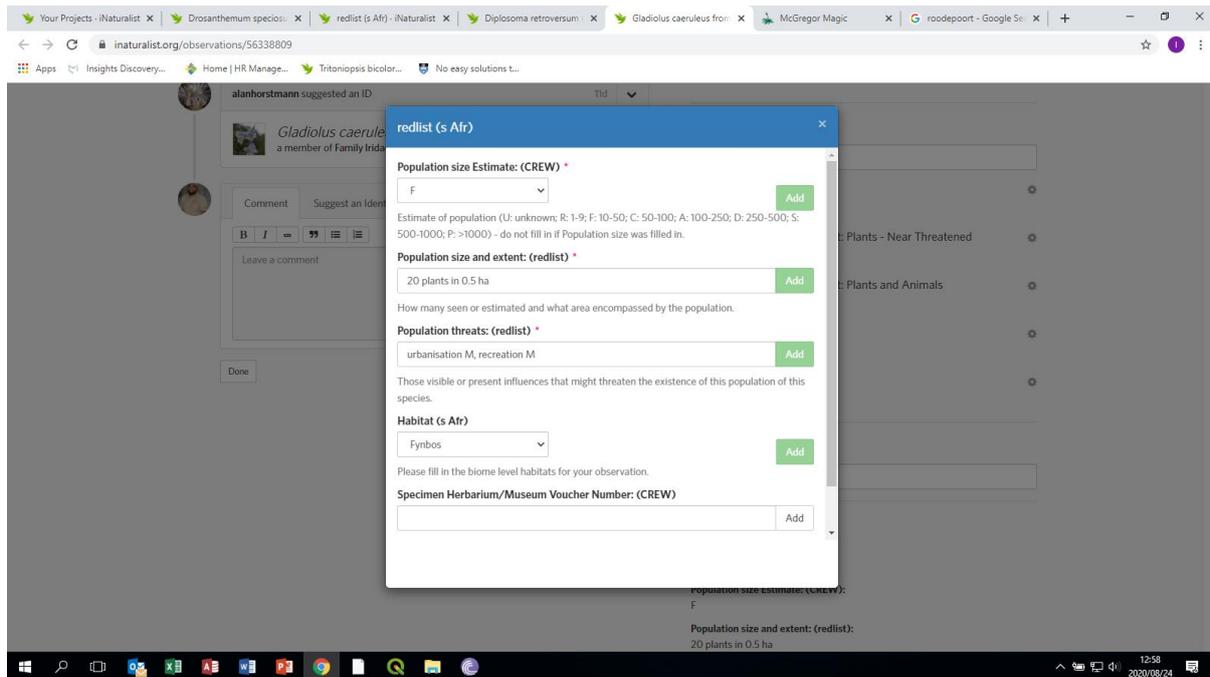
- On the Projects panel (see below - on the right of the screen) type in “redlist (s Afr)” – as you type the matching projects in your basket will display: select redlist (s Afr)



- Complete the observation fields - fields marked with *, these are compulsory.
 - **Population size Estimate (CREW) ***: This is a drop-down field for population estimates. The CREW codes are shown below the box. As a CREW citizen scientist you will be noting these in the field. Click the Add button alongside.
 - **Population size and extent (redlist) ***: Please record the number of plants you saw and roughly the area you sampled. You can write it as 60 plants in 1 ha or 27 seen in entire patch or 15 seen in 200m walked. It does not have to be precise, so there is no need to do any measurements, but please be as accurate as possible. Click the Add button alongside.
 - **Population threats (redlist) ***: List threats seen at the site. We recommend that you add the degree of impact for each threat (L for low, M for Medium, H for High). So data like: Port Jacksons H dense tall stand,, Grazing M, trampling by hikers L. If there are no visible threats, please say “no threats observed”. Note that these are threats to the species at this site: not general threats observed elsewhere or recorded in reports. Click the Add button alongside.
 - **Habitat (s Afr)**: Add in the habitat and click the Add button alongside. This is an optional field.
 - **Specimen Herbarium/Museum voucher number**: If you have collected a specimen of the plant in your observation you can add your collection number. Click the Add button alongside.

This will allow us to verify identification and keep track of specimens collected. If you are submitting specimens via CREW you will still need to provide an herbarium label for us to process the specimens. If you want more information about the specimen processing system, please contact your local CREW node. Leave it blank if you did not collect a specimen and do not click the Add button.

When you have filled in all the fields, then click on the “Add to Project” button to add the project. This is important as doing this will give the CREW team the permission to see any data that you might have obscured. Note that Sensitive Species are obscured automatically.



redlist (s Afr)

Population size Estimate: (CREW) *

F

Estimate of population (U: unknown; R: 1-9; F: 10-50; C: 50-100; A: 100-250; D: 250-500; S: 500-1000; P: >1000) - do not fill in if Population size was filled in.

Population size and extent: (redlist) *

20 plants in 0.5 ha

How many seen or estimated and what area encompassed by the population.

Population threats: (redlist) *

urbanisation M, recreation M

Those visible or present influences that might threaten the existence of this population of this species.

Habitat (s Afr)

Fynbos

Please fill in the biome level habitats for your observation.

Specimen Herbarium/Museum Voucher Number: (CREW)

And that is it. If you prefer to add the observations from your app directly while you are in the field, then please see the instructions for the app which are available (the Android and iPhone apps are slightly different, so the instructions are separate).

Thank you for your help.

The CREW team will periodically download the data from the redlist (s Afr) project. The SANBI Redlisting team will incorporate data from iNat into the Redlist database to assist with assessments.

This new streamlined system will significantly increase the number of records we receive for species of conservation concern. If you would like to add a short habitat description or notes you can do so in the standard description field of an iNat observation. We also highly recommend that you include a habitat picture in your observations. The habitat picture should be good enough to allow the habitat to be seen, without revealing the actual locality.

If you have any questions you can contact:

Ismail Ebrahim (Western Cape and Northern Cape) – I.Ebrahim@sanbi.org.za

Vathiswa Zikishe (Eastern Cape) – V.Zikishe@sanbi.org.za

Suvarna Parbhoo (Rest of the country) – S.Parbhoo@sanbi.org.za