

Adding Taxonomic Names

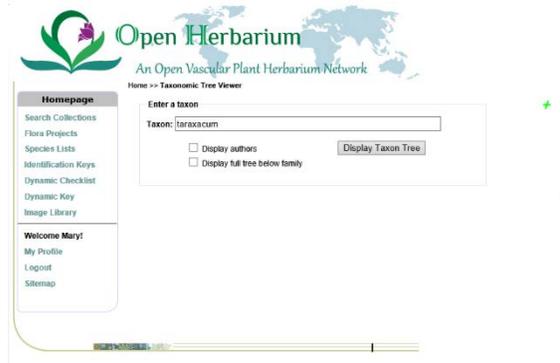
Adding names, both scientific and vernacular, to a Symbiota network requires special permission because names affect all users. It is imperative, therefore, that one take care in doing so. It is also important to take care in changing synonymy relationships, particularly for controversial taxa. More on that later.

These instructions were written for those wishing to add names of vascular plants. The images are taken from OpenHerbarium. The instructions refer to two resources, IPNI and TROPICOS, that will be of no use to those adding algal, fungal, or animal names. Some suggestions for those working with such groups are listed at the end.

Adding a name.

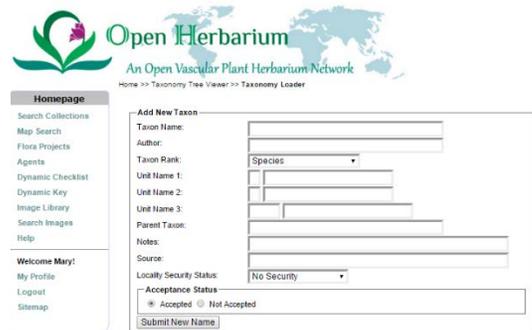
1. Log in to your Symbiota network.
2. Click site map and search (ctrl-F on a PC) for "Viewer" to go to "Taxonomic Tree Viewer" and click on it. This will bring up the page shown in Fig. 1.
3. To add a name, click on the plus sign at the top right.

To view names that are already in, enter a name in the box. If you enter a family or generic name, all the species and infraspecies currently in the network will be listed. Enter a higher ranked name will result in the families in it being listed with a link to reveal lower ranks of the family.



4. Back to adding a name. Fig. 2 shows the page revealed by clicking on the plus sign.

BIG WARNING: This is the point at which you must be careful. There are two really good resources for vascular plant names: International Plant Names Index (<http://ipni.org>) and Tropicos (<http://tropicos.org>). They have different histories and, as a result, somewhat different contents, strengths, and weaknesses but they tend to be more reliable than most other resources. Please do not use regional floras, ITIS, or GBIF.



5. Copy and paste the scientific name you wish to add into the Taxon name from either IPNI or TROPICOS. This will minimize the possibility of entering incorrect spellings into the network. IPNI does not have old infraspecific taxa but now enters them. Tropicos is more likely to have them.

If you cannot find the name you wish to add in either resource, it is possible that the source you are using has an error. One way to check is, in TROPICOS, type in the first few letters of the name and it will autocomplete or you can hit enter but to get the name you are interested in it may be necessary to enter 4 or 5 letters.

6. There must be an entry for the rank above the name you wish to enter because that is how the

hierarchy is established. In other words, generic names must be added before a species can be added, and species before an infraspecies.

Note that the family taxonomy used in the default taxonomy of OpenHerbarium and SEINet is that used in Christenholz et al. 2012. This means, for example, that *Scrophulariaceae* is interpreted narrowly, and *Plantaginaceae* very broadly. Similarly, *Liliaceae* is a relatively small family, *Asparagaceae* a large one.

7. If there is no entry for it in the network, there are three possibilities: a) there is a spelling error in the name you are trying to enter; b) there is a spelling error in the version in the network (regrettably this is sometimes the case); of c) the name has not been entered yet.

To check which of these applies, try typing the name in more slowly and see what is suggested. This will help locate names that differ in one or two letters. The name you want be in but spelled incorrectly (sorry, but it is possible) or, just possibly, the spelling you are using is incorrect.

8. If the name you want to add does not appear below the taxon box, click the green plus sign in the top right. That will bring up the add taxon page.
9. Open Tropicos and search for your name, let us say it is *Taraxacum afghanicum*.
10. Copy and paste the name and author name into the appropriate boxes.

Copying and pasting protects against typing errors.

11. Review the other boxes.
 - a. Check that the rank is in correctly. If you are entering a generic name, you will have to enter it explicitly. If you enter two words in the taxon name box, it will usually be treated as a species name. (Sometimes this is not the case so check).
 - b. I use "Source" if I am going to change whether a name is accepted or not. I cite the reference supporting the change in the notes box. It is usually too long for the "Source" box. In general, I leave these two boxes blank.
 - c. If the "Locality Security" button is change to read "Hide Locality Details", only authorized individuals will be able to see the locality details, images, and maps for the taxon. Use it if the taxon is both rare and likely to be the target of people who will devastate its population(s).
 - d. Accepted means that it is being used. If you check "Not accepted" you will have to state that the accepted name is. This means you should enter accepted names first.

The screenshot shows the 'Add New Taxon' form on the Open Herbarium website. The form is titled 'Add New Taxon' and includes the following fields and options:

- Taxon Name: Taraxacum afghanicum
- Author: Soest
- Taxon Rank: Species (dropdown menu)
- Unit Name 1: Taraxacum
- Unit Name 2: afghanicum
- Unit Name 3: (empty)
- Parent Taxon: Taraxacum
- Notes: (empty)
- Source: (empty)
- Locality Security Status: No Security (dropdown menu)
- Acceptance Status: Accepted Not Accepted
- Submit New Name button

And that is all there is to it. One can, in theory upload several names at once but, again for reasons we have not been able to track down, the resulting names do not link into the hierarchy. If they are not linked in, specimens with those names will not come up in a search.

Names for algae, bryophytes, and fungi (including lichens).

Algae

Algaebase: <http://www.algaebase.org/>. I was delighted to find it working. At one time it was not because it ran out of funding. It has descriptions and pictures. It shows whether a name is considered accepted or not. In several instances, the answer is "not known" which may be frustrating but it is better than pretending confidence.

Nominum algarum: <http://ucjeps.berkeley.edu/INA.html>. This started as a card file and it is not clear to me how it is being developed. It is like IPNI in that all it attempts to do is provide information about the publication of names, not taxonomic relationships.

Bryophytes

Tropicos (Bryophytes): <http://www.mobot.org/MOBOT/tropicos/most/bryolist.shtml>

I shall add the names in the list before May 1, 2017.

Fungi

Index fungorum: <http://www.indexfungorum.org/>. The [Index Fungorum](#), the global database of fungal names coordinated and supported by the [Index Fungorum Partnership](#), contains names of fungi (including yeasts, lichens, chromistan fungi, protozoan fungi and fossil forms) at all ranks. New names from the [Index of Fungi](#), compiled at CABI-UK and published by [CABI](#), are added every three months. Links to protologues are being added.

Species fungorum: <http://www.speciesfungorum.org/>. This provides more information on taxonomy.

Note: In August 2016, I added all the accepted names from [Index fungorum](#) to OpenHerbarium. This will help in getting started but that means there are still many that have not been added.