

Webinar 2

Resolving Nomenclature: Making Appropriate Taxonomic Choices

Session Summary Webinar 1



- Advances in biodiversity science, combined with emerging technologies and the ability to handle "big data" have greatly improved and expanded our capability to explore biodiversity in an unprecedented fashion. We can now link data from growing repositories (trees, occurrences, traits) and computational tools/approaches to integrate evolution and ecology at broad scale. This new synthesis is reshaping views of ecology/evolution with important conservation implications.
- Scaling biogeographic analyses from a small number of species or genera to explore patterns of evolution and diversity for thousands or tens of thousands of taxa on continental and global scales requires software tools that automate and parallelize computational tasks to make analyses practically feasible, efficient, with reasonable timelines.

Allen et al.. 2019. Biodiversity synthesis across the green branches of the tree of life. *Nature Plants* 5:11-13.

Goals



Learn why and how to treat nomenclatural data that will be used in multiple biodiversity analysis

Learning Objectives



Biological Objectives:

✓ Introduce the reasoning for making nomenclatural decisions.

Technological Objectives:

✓ Introduce technological tools available for making nomenclatural decisions.

Webinar organization



- 1. Exploring Concepts: why ensuring nomenclature is an important first step in this workflow!
- Demonstrations: manual and automated ways of properly treating nomenclature decisions
- 3. Exercises: practice automated ways of treating nomenclature
- 4. Session Summary, Q&A and Discussion

Exploring Concepts



Why do we have to make nomenclatural decisions?

Ensure taxa names are ready for integration on a large scale!

Names must be...

- ✓ accepted
- ✓ unique
- √ consistent



Demonstration: showing manual ways of properly treating nomenclature decisions:

a) Useful for smaller datasets,

b) Tool to subset large datasets and verify procedures

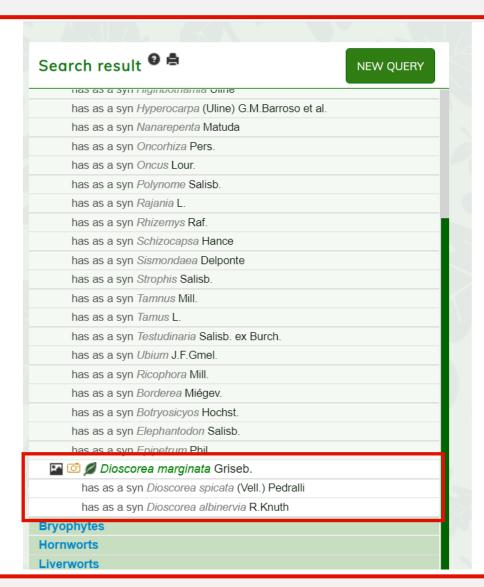


1615	1614 Dioscorea marginata	Dioscorea	albinervia, Dioscorea cynanchifolia					
1616	1615 Dioscorea sincorensis	NA						
1617	1616 Dioscorea stenophylla	Dioscorea	Dioscorea stenophylla paucinervis					
1618	1617 Diospyros sericea	Diospyros	Diospyros praetermissa, Diospyros vestita, Maba sericea, Ebenus sericea					
1619	1618 Diplococcium dendrocalami	NA						
1620	1619 Diplopterys hypericifolia	Banisteria	nypericifolia, Banisteria rigida, Banisteriopsis hypericifolia					
1621	1620 Diplusodon adpressipilus	NA						
1622	1621 Diplusodon aggregatifolius	NA	1 - Downloaded lists with					
1623	1622 Diplusodon alatus	NA	greented names (from DEEL ODA)					
1624	1623 Diplusodon appendiculosus	NA	accepted names (from REFLORA)					
1625	1624 Diplusodon argenteus	NA	and synonyms from ITIS, GBIF and					
1626	1625 Diplusodon argyrophyllus	NA						
1627	1626 Diplusodon bahiensis	NA	TROPICOS					
1628	1627 Diplusodon bradei	NA						
1629	1628 Diplusodon buxifolius	Diplusodor	buxifolius naudinii, Diplusodon vaccinifolius, Friedlandia buxifolia, Friedlandia vaccinifolia					
1630	1629 Diplusodon canastrensis	NA						
1631	1630 Diplusodon candollei	Diplusodor	ı candollei					
1632	1631 Diplusodon ciliiflorus	NA						
1633	1632 Diplusodon cordifolius	NA						
1634	1633 Diplusodon decussatus	NA						



FLORA E FUNGA DO BRASIL					⊕ EN ▼ LOGIN			
	CLEAR FILTERS	SEARCH	Home	Team	Current Status of Taxa	Publications/References	Access to Data	News
Name			Flora	e Funga o	do Brasil			
Group	Family		2044) D	at Tanant A. aatab Kaba d booth a	Olahari Otaataan fan Diant Oanaa		
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Genus	Species		"F	_ M	ANIIAIIY	compared		do Brasil".
Dioscorea Q	marginata	Q	"[2	_ /	IAITOALLI	compared		ticles and
Author	Vernacular name		re p S	vno	nyms fron	n ITIS, GBIF	and	lo Brasil 20 I descripti
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Description	Images		o d re	EFL	ORA!			ne inclusio ers were tion (by st
☐ Only taxa with Description ☐ Having Images Life Form and Substrate				in Brazil, endemism and Phytogeographic Domains), in addition to including valuable data on life forms, substrate a vegetation types for the species worked. It is important to note that high resolution images of exsiccates, as well as images species in nature and scientific illustrations are also associated with taxa to aid in their recognition. However, the monograph completed for Algae and for Fungi were not able to cover the real diversity of these groups in Brazil and this was a stimulus the beginning of this new phase of the project, now called Flora e Funga do Brasil . This change aims to seek a me				
Life Form Substrate				e biologic	al terminology for the Fungi	Kingdom and a greater engage of species occurring in the country	ment of the mycolog	ical and lichenolo





Information

Images Voucher

Dioscorea marginata Griseb. NE ∧ NE







Taxonomic Hierarchy

Accepted Name, Correct name

Flora e Funga \rightarrow Angiosperms \rightarrow Dioscoreaceae R.Br. \rightarrow Dioscorea L.

→ **Z** Dioscorea marginata Griseb.

Images from the field





1482 Accepted	Angiosperms	1614	Dioscorea marginata	Dioscorea albine	rvia, <mark>Dioscorea cynanchifolia</mark> , Dioscorea spicata			
1483 Accepted	Angiosperms	1615	Dioscorea sincorensis	NA	NA			
1484 Accepted	Angiosperms	1616	Dioscorea stenophylla	Dioscorea stenop	Dioscorea stenophylla var. paucinervis			
1485 Accepted	Angiosperms	1617	Diospyros sericea	Diospyros praete	Diospyros praetermissa, Diospyros vestita, Maba sericea, Ebenus sericea			
1486 Accepted	Angiosperms	1619	Diplopterys hypericifolia	Banisteria hyperi	Banisteria hypericifolia, Banisteria rigida, Banisteriopsis hypericifolia			
1487 Accepted	Angiosperms	1620	Diplusodon adpressipilus	NA				
1488 Accepted	Angiosperms	1621	Diplusodon aggregatifolius	NA	No composite to design and			
1489 Accepted	Angiosperms	1622	Diplusodon alatus	NA	No synonyms listed under any			
1490 Accepted	Angiosperms	1623	Diplusodon appendiculosus	NA	of the databases!			
1491 Accepted	Angiosperms	1624	Diplusodon argenteus	NA				
1492 Accepted	Angiosperms	1625	Diplusodon argyrophyllus	NA				
1493 Accepted	Angiosperms	1626	Diplusodon bahiensis	NA				
1494 Accepted	Angiosperms	1627	Diplusodon bradei	NA, Diplusodon i	rupestris			
1495 Accepted	Angiosperms	1628	Diplusodon buxifolius	Diplusodon buxi	Diplusodon buxifolius naudinii, Diplusodon vaccinifolius, Friedlandia buxifolia, Friedlandia vaccinifolia			
1496 Accepted	Angiosperms	1629	Diplusodon canastrensis	NA	NA			
1497 Accepted	Angiosperms	1630	Diplusodon candollei	NA	NA			
1498 Accepted	Angiosperms	1631	Diplusodon ciliiflorus	NA, Diplusodon	NA, Diplusodon psammophilus			
1499 Accepted	Angiosperms	1632	Diplusodon cordifolius	NA	NA			
1500 Accepted	Angiosperms	1633	Diplusodon decussatus	NA	NA			
1501 Accepted	Angiosperms	1634	Diplusodon epilobioides	Friedlandia epilo	Friedlandia epilobioides			
1502 Accepted	Angiosperms	1635	Diplusodon ericoides	NA	NA			
1503 Accepted	Angiosperms	1636	Diplusodon fastigiatus	NA				
1504 Accepted	Angiosperms	1637	Diplusodon glaucescens	Friedlandia glaucescens, Friedlandia nummularifolia				



1482 Accepted	Angiosperms	1614 Dioscorea marginata	Dioscorea albinervia, Dioscorea cynanchifolia, Dioscorea spicata			
1483 Accepted	Angiosperms	1615 Dioscorea sincorensis	NA	NA		
1484 Accepted	Angiosperms	1616 Dioscorea stenophylla	Dioscorea stenophylla var.	Dioscorea stenophylla var. paucinervis		
1485 Accepted	Angiosperms	1617 Diospyros sericea	Diospyros praetermissa, Dio	ospyros vestita, Maba sericea, Ebenus sericea		
1486 Accepted	Angiosperms	1619 Diplopterys hypericifolia	Banisteria hypericifolia, Bar	Banisteria hypericifolia, Banisteria rigida, Banisteriopsis hypericifolia		
1487 Accepted	Angiosperms	1620 Diplusodon adpressipilus	NA	NA		
1488 Accepted	Angiosperms	1621 Diplusodon aggregatifolius	NA	Cymonymae listed ONLY		
1489 Accepted	Angiosperms	1622 Diplusodon alatus	NA	Synonyms listed ONLY		
1490 Accepted	Angiosperms	1623 Diplusodon appendiculosus	NA	in REFLORA!		
1491 Accepted	Angiosperms	1624 Diplusodon argenteus	NA			
1492 Accepted	Angiosperms	1625 Diplusodon argyrophyllus	NA			
1493 Accepted	Angiosperms	1626 Diplusodon bahiensis	NA			
1494 Accepted	Angiosperms	1627 Diplusodon bradei	NA, Diplusodon rupestris			
1495 Accepted	Angiosperms	1628 Diplusodon buxifolius	Diplusodon buxifolius naud	Diplusodon buxifolius naudinii, Diplusodon vaccinifolius, Friedlandia buxifolia, Friedlandia vaccinifolia		
1496 Accepted	Angiosperms	1629 Diplusodon canastrensis	NA			
1497 Accepted	Angiosperms	1630 Diplusodon candollei	NA	NA		
1498 Accepted	Angiosperms	1631 Diplusodon ciliiflorus	NA, Diplusodon psammoph	NA, Diplusodon psammophilus		
1499 Accepted	Angiosperms	1632 Diplusodon cordifolius	NA			
1500 Accepted	Angiosperms	1633 Diplusodon decussatus	NA	NA		
1501 Accepted	Angiosperms	1634 Diplusodon epilobioides	Friedlandia epilobioides			
1502 Accepted	Angiosperms	1635 Diplusodon ericoides	NA			
1503 Accepted	Angiosperms	1636 Diplusodon fastigiatus	NA			
1504 Accepted	Angiosperms	1637 Diplusodon glaucescens	Friedlandia glaucescens, Fri	Friedlandia glaucescens, Friedlandia nummularifolia		



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1487 Accepted	Angiosperms	1620 Diplusodon adpressipilus	NA			
1488 Accepted	Angiosperms	1621 Diplusodon aggregatifolius	NA			
1489 Accepted	Angiosperms	1622 Diplusodon alatus	NA			
1490 Accepted	Angiosperms	1623 Diplusodon appendiculosus	NA			
1491 Accepted	1 Accepted Angiosperms 1624 Diplusodon argenteus		NA	NA		
1492 Accepted	Angiosperms	1625 Diplusodon argyrophyllus	NA	NA		
1493 Accepted	Angiosperms	1626 Diplusodon bahiensis	NA			
1494 Accepted	Angiosperms	1627 Diplusodon bradei	NA, Diplusodon rupestris			
1495 Accepted	495 Accepted Angiosperms 1628 Diplusodon buxifolius		Diplusodon buxifolius naudinii, Diplusodor	Diplusodon buxifolius naudinii, Diplusodon vaccinifolius, Friedlandia buxifolia, Friedlandia vaccinifolia		
1496 Accepted	Angiosperms	1629 Diplusodon canastrensis	NA			
1497 Accepted	Angiosperms	1630 Diplusodon candollei	NA	Synonyms NOT listed		
1498 Accepted	Angiosperms	1631 Diplusodon ciliiflorus	NA, Diplusodon psammophilus	in REFLORA!		
1499 Accepted	Angiosperms	1632 Diplusodon cordifolius	NA IN REFLORA!			
1500 Accepted	Angiosperms	1633 Diplusodon decussatus	NA			
1501 Accepted	Angiosperms	1634 Diplusodon epilobioides	Friedlandia epilobioides			
1502 Accepted	Angiosperms	1635 Diplusodon ericoides	NA			
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Original list, synonyms compiled from ITIS, TROPICOS and GBIF

Dioscorea marginata

Dioscorea albinervia, Dioscorea cynanchifolia





Original list, synonyms compiled from ITIS, TROPICOS and GBIF

Dioscorea marginata

Dioscorea albinervia, Dioscorea cynanchifolia



Dioscorea marginata

Dioscorea albinervia, Dioscorea cynanchifolia, Dioscorea spicata



Original list, synonyms compiled from ITIS, TROPICOS and GBIF

Dioscorea marginata

Dioscorea albinervia, Dioscorea cynanchifolia



Dioscorea marginata

Dioscorea albinervia, Dioscorea cynanchifolia, Dioscorea spicata

Synonym listed in both REFLORA and compiled list

Synonym NOT listed in REFLORA!

Synonym listed ONLY in REFLORA!

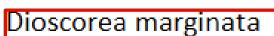


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Dioscorea marginata

Dioscorea albinervia, Dioscorea cynanchifolia





Dioscorea albinervia, Dioscorea cy anchifolia, Dioscorea spicata

Synonym listed in both REFLORA and compiled list

Synonym NOT listed in REFLORA!

Synonym listed ONLY in REFLORA!

Time to Exercise!



What happens when there is a large dataset?

Should we manually check 40,000 records?



We use BiotaPhy tools to automate nomenclatural decision making!



Time to Exercise!



Let's put the automated framework developed by BiotaPhy to test! How to resolve a species list name:

3 steps:

- ✓ Data Preparation
- ✓ Run Tutorial
- ✓ Inspect Output

Input: species list

Input: Wrangler configuration file

Input: Script parameter file

Data Preparation: species list



Data preparation

Input: species list

Use an existing or prepare a new species list, a text file with one name per line. This file is specified in the script parameter file described below.

- 1. The tutorial example species list is heuchera.txt.
- 2. Some resources:
 - 1. World Flora Online, WFO
 - 2. Query GBIF, i.e. heuchera query

- 1 Heuchera nana (A. Gray) Rydb.
- 2 Heuchera alpina (S. Watson) Blank.
- 3 Heuchera versicolor Greene
- 4 Heuchera sitgreavesei Rydb.
- 5 Heuchera townsendii Rydb.
- 6 Heuchera racemosa S.Watson
- 7 Heuchera mexicana W. Schaffn. ex Rydb.
- 8 Heuchera amoena Rosend. & Butters & Lakela
- 9 Heuchera divaricata Fisch. ex Ser.
- 10 Heuchera drummondii G.Nicholson
- 11 Heuchera x easthamii Calder & Savile
- 12 Heuchera flabellifolia Rydb.
- 13 Heuchera foliosa Rahn.
- 14 Heuchera gracilis Rydb.

Data Preparation: species list

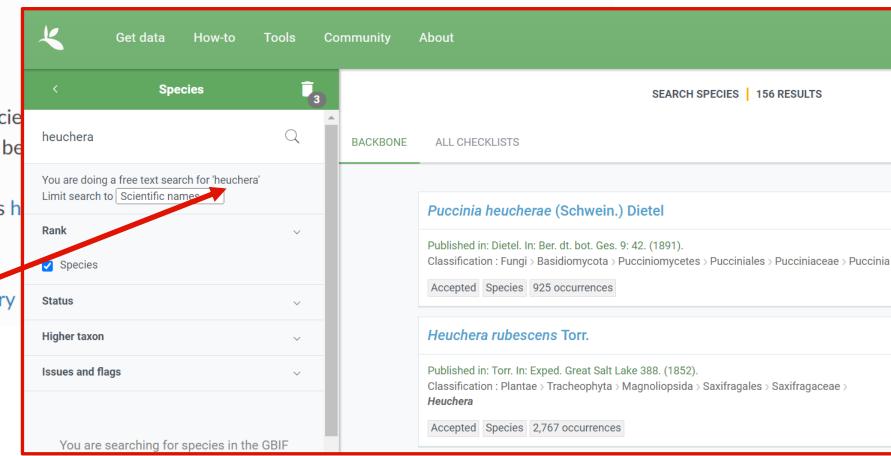


Data preparation

Input: species list

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- 1. The tutorial example species list is h
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 - 1. World Flora Online, WFO
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Data Preparation: wrangler file



Input: Wrangler configuration file

A data wrangler configuration is a file containing a JSON list of zero or more wranglers - each performs a different operation, and each has its own parameters. More information on file format, available wrangler types, and the required and/or optional parameters for each are at Species List: Wrangling.

Species List Wrangler Types

Wrangler types that perform different operations when dealing with species lists! You add the name of the corresponding wrangler after the parameter: "wrangler_type"

Data Preparation: wrangler file



Species List Wrangler Types

AcceptedNameSpeciesListWrangler

- optional
 - name_map (str or dict): A dictionary or filename containing a dictionary of original name to accepted name. Defaults to None, but either this or name_resolver must be provided.
 - name_resolver (str or Method): Use this method for getting new accepted names. If set to
 'gbif' or 'otol', use GBIF or OTOL name resolution respectively. Defaults to None, but either
 this or name_map must be provided.
 - out_map_filename (str): Output for name-mapping between original and accepted names.
 This file is then acceptable for use as a name-map input for subsequent name wrangling.
 Defaults to None.
 - map_write_interval (int): Interval at which to write records to disk. Used to ensure that if something fails, all is not lost. Defaults to 100.
 - out_map_format (str): Type of file format for out_map_filename, defaults to "json".

IntersectionSpeciesListWrangler

- required
 - species_list (str): Filename containing species list to intersect

MatchMatrixSpeciesListWrangler

- required
 - matrix (str): Filename containing matrix to match

MatchTreeSpeciesListWrangler

- required
 - tree (str): Filename containing tree to match

UnionSpeciesListWrangler

- required
 - species_list (str): Filename containing species list to join

Data Preparation: wrangler file







Input: Script parameter file

A JSON parameter file is required for this command. The tutorial parameter file is wrangle_species_list_gbif.json. These are the required and optional parameters:

Required:

- in_species_list_filename: Input filename containing species list, described in the section above.

 The tutorial example species list is heuchera.txt.
- wrangler_configuration_file: species list wrangler configuration file, described in the previous input section. The tutorial example wrangler configuration contains one wrangler, the AcceptedNameSpeciesListWrangler, and is in splist_wranglers_gbif.json
- out_species_list_filename: output filename for resolved species list.

Optional

- log_filename: Output filename to write logging data
- log_console: 'true' to write log to console
- report_filename: output filename with data modifications made by wranglers

- 1 Heuchera nana (A. Gray) Rydb.
- 2 Heuchera alpina (S. Watson) Blank.
- 3 Heuchera versicolor Greene
- 4 Heuchera sitgreavesei Rydb.
- Heuchera townsendii Rydb.
- 6 Heuchera racemosa S.Watson
- 7 Heuchera mexicana W. Schaffn. ex Rydb.
- 8 Heuchera amoena Rosend. & Butters & Lakela
- 9 Heuchera divaricata Fisch. ex Ser.
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The file we just saw in the previous slide!



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The file we just saw in the previous slide!

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Especially important to help visualize what is happening and to make sure code is running smoothly! Optional, BUT HIGHLY RECOMMENDED!

Let's run this tutorial!



Hands-on: Run tutorial with 'gbif' service

Initiate the process with the following:

Goal: produce a file with resolved species names (ONLY ACCEPTED NAMES)

./run_tutorial.sh wrangle_species_list data/config/wrangle_species_list_gbif.json

Windows users will run with: run_tutorial.bat

Remember, you will RUN this code in the terminal or in the command prompt for Windows!



Output

This process outputs files configured in the script parameter file:

- 2. If report_filename is specified in the script parameter file, a summary of name resolutions, like wrangle_species_list_gbif.log
- 3. If *log_filename* is specified in the script parameter file, a report like wrangle_species_list_gbif.rpt containing a summary of the processing.
- 3. If *log_console* is specified in the script parameter file, logs will be written to the command prompt during execution.
- 4. an output species list named in the out_species_list_filename, like heuchera_wrangled.txt containing the modified species list, one name per line.

The process produces one additional file configured in the wrangler configuration file:

• An out_map_filename containing a name-map from the AcceptedNameSpeciesListWrangler. The name-map is a JSON file with pairs of names - the original name to the accepted name according to the specified authority. This name-map is suitable to use for input when resolving another dataset containing a subset of the same original names. A sample output name-map is splist_wrangle_gbif.namemap.

SECONDARY OUTPUT

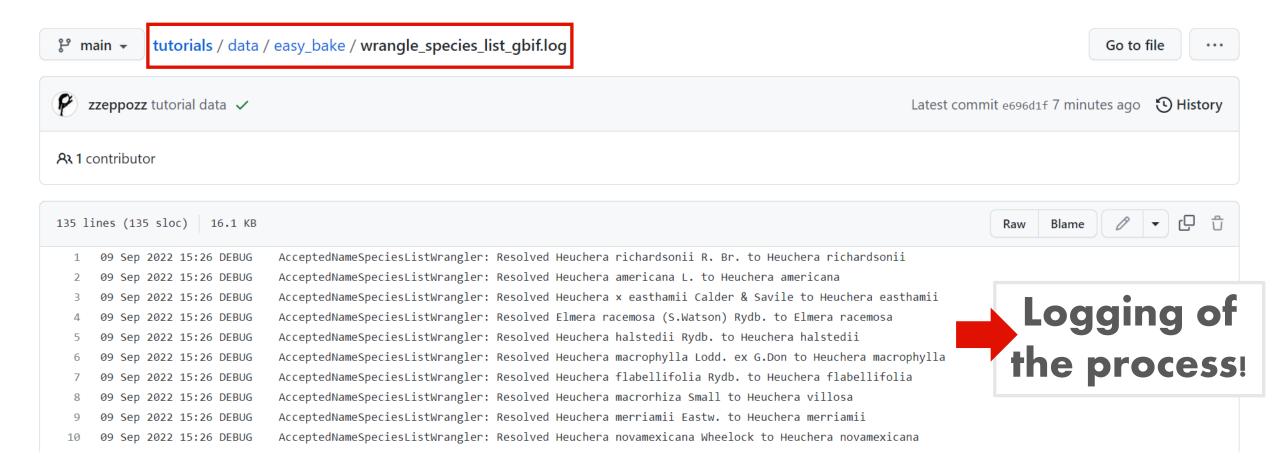
PRIMARY OUTPUT

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While it runs let's look at... SECONDARY OUTPUT





While it runs let's look at... SECONDARY OUTPUT





While it runs let's look at...

PRIMARY OUTPUT

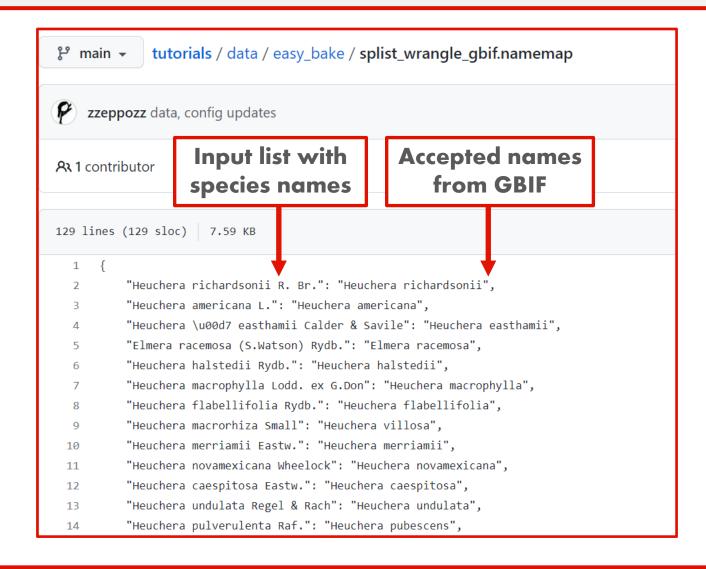
Goal: produce a file with resolved species names (ONLY ACCEPTED NAMES)

82 lines (82 sloc) 1.75 KB Heuchera maxima Heuchera missouriensis Heuchera hallii Heuchera hemsleyana Heuchera cylindrica glabella Heuchera rubescens versicolor Heuchera novamexicana Heuchera brevistaminea Heuchera americana Heuchera americana hirsuticaulis Heuchera hirsutissima Heuchera elegans Heuchera duranii Heuchera parvifolia nivalis Heuchera longipetala orizabensis Heuchera parvifolia flavescens Heuchera glabra 17 Heuchera pilosissima hemisphaerica



While it runs let's look at...
PRIMARY OUTPUT

By product: NAME-MAP connecting original and accepted names using GBIF!!



Session Summary, Q&A and Discussion Biophy



- 1. Species list must contain: ACCEPTED, UNIQUE and CONSISTENT names!
- 2. Manual ways of treating nomenclature: useful for small datasets and to subset large datasets.
- 3. Automated ways of treating nomenclature: useful for large datasets.
- 4. BiotaPhy framework is a great toolkit for automated pathway!

Session Summary, Q&A and Discussion Biomphy



Any questions??

Please, use the link to the Jamboard to write your question!