

# Taxonomy Committee Notes

## Resources

[GitHub Project](#)

Arctos Zoom Room: <https://berkeley.zoom.us/j/92544859519>

## 2025-1-9

## Participants

Genna, Hannah, Dusty

Regrets:

Topics for Discussion

- Is the best way to proceed with making sure WoRMS is up to date refreshing parts of it periodically? Or should we not really worry about it?  
<https://github.com/ArctosDB/arctos/issues/8176>
  - Closed
- AWG - Cam to do Demo at next meeting
  - Sharing by Cam of importing of World Flora Online to 'UAM Plants' classification, multiple name usages, and synonymy lookup ([example](#)).
- Botanical infraspecific taxon names [#7962](#)
  - a. Shifting intraspecific ranks to A strings, where A strings may already exist - tricky

## 2024-11-14

## Participants

Genna, Dusty, Cam

Regrets:

Topics for Discussion

2. botanical infraspecific taxon names [#7962](#)
  - a. Bigger audience needed to discuss in more detail

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3. Can you switch preferred classification for only one taxon?  
<https://github.com/ArctosDB/arctos/issues/8138>
  - a. Cam: Taxonomy is shared, but when one collection wants to curate a specific Taxon differently, the solution is to 1) copy Arctos taxonomy into a new source that the collection can edit specifically
  - b. Dusty: doesn't recommend cloning all of the Arctos taxonomy because then you have to manage all of that taxonomy. Can instead create source for a specific group, and rank that one first; other taxa that aren't within that source will then default to the next source  
(<https://handbook.arctosdb.org/documentation/taxonomy.html#taxon-classification-sources>)
  - c. Overview of how to create the new taxonomic structure for a new preferred source- spreadsheets (google sheets) are adequate management systems that Arctos can handle
4. <https://github.com/ArctosDB/arctos/issues/7941> Feature Request - display\_name under GUID on catalog record page #7941
  - a. Dusty: there are two parts to this 1) pull something out of a classification and display it in various names, or 2) "make" that string (displaying vs making the fancy string)
  - b. Cam: good to display exactly how its written on the label. Dusty says that can be handled through A string. But that is difficult to edit later on, versus making it a separate field.
5. <https://github.com/ArctosDB/arctos/issues/7983>
  - a. Two different kinds of tools; dusty proposed a solution, but now it is a social issue. Will have to retire one tool to make the other. There are back end limitations.
  - b. Cam: It would be great if Dusty could make a presentation on what limitations he is working with behind the scenes
6. Sharing by Cam of importing of World Flora Online to 'UAM Plants' classification, multiple name usages, and synonymy lookup ([example](#)).

# Taxonomy Committee Notes

2024-09-12

## Participants

Genna, Phyllis, Dusty

Regrets: Cam Webb

## Topics for Discussion

7. botanical infraspecific taxon names [#7962](#)
8. Feature Request - display\_name under GUID on catalog record page  
<https://github.com/ArctosDB/arctos/issues/7941>
  - a. Discussed the possible impacts of adding the authority to formatted scientific name in flat - has the potential to impact how data are shared in perhaps unforeseeable ways. Difficult to understand what the priority of this request is
  - b. flat.formatted\_scientific\_name - HELP!  
<https://github.com/ArctosDB/arctos/issues/8009>
  - c.

2024-07-11

## Participants

Phyllis, Genna A., Teresa MM

Regrets: Angela H, Cam Webb (too late)

## Topics for Discussion

1. <https://github.com/ArctosDB/arctos/issues/7022>
  - a. Can dusty refresh relationships between taxa without refreshing ALL of WoRMS?

# Taxonomy Committee Notes

- b. This isn't really causing any problems... but might be nice to have?
- c. Maybe there could be a way to refresh the taxon *relationships* for a certain taxon group (a genus, family ,etc.) like we can refresh taxon names for WoRMS right now?
- d. But are people actually coming to Arctos to do this search? Probably not, they are probably going through the aggregators
- e. Can probably keep issue open, but is not a priority or that useful currently
- f. Something that would actually be useful: Being able to import new names that are in WoRMS for a family but not in WoRMS via Arctos. A tool that would compare what is in Arctos vs what is in WoRMS and then give you a csv to upload, just with name and AphiaID. Here are all the names in WoRMS, which aren't in Arctos?
  - i. Can have it be on demand or to refresh every so often (6 months, etc.)

## Meeting Chat

12:06:53 From Phyllis Sharp to Everyone:

a body of water forming a geographical feature, for example a sea or a reservoir.

12:07:09 From Phyllis Sharp to Everyone:

[https://en.wikipedia.org/wiki/Body\\_of\\_water](https://en.wikipedia.org/wiki/Body_of_water)

## 2024-05-09

### Participants

Teresa, Angela H

Regrets:

Topics for Discussion

1. We talked about adding new names and how classifications work
2. Also just chatted about stuff in general!

## 2024-03-14

### Participants

Teresa, Dusty, Angela H., Cam W.

Regrets:

# Taxonomy Committee Notes

## Topics for Discussion

1. Bell museum verbatim determiners - let's clean them up!
  - a. Teresa will look into how many and we will decide how to proceed.
2. Synonyms
  - a. Links between classifications would be more precise
  - b. Hard to get things fixed
  - c. You can do this now, but how would search work?
  - d. Classification should terminate with the same name as the canonical name (this is how everyone does it).
  - e. SOLUTION: add synonym of with name in value and everything works!
  - f. Please add UAM Plants as a taxonomy source.

2024-01-11

## Participants

Phyllis, Genna, Teresa

Regrets: Angela Hornsby [want to continue on this committee but haven't been able to make the last several meetings, including this one]

## Topics for Discussion

1. add 1 identification form - <https://github.com/ArctosDB/arctos/issues/7009>
2. Work on adding listed for Cites and IUCN (from [2023-11-30\\_Working\\_Group\\_Agenda](#) : <https://github.com/ArctosDB/arctos/issues/7023>

2023-11-09

## Participants

Teresa, Genna, Phyllis

## Topics for Discussion

- Is this ready to close? [identification remarks - are overburdened and need cleanup#4922](#)  
Will leave open for other collections and Dusty.
- We closed this issue [Request addition to dwc archive published to IPT - dwc:scientificNameID#5814](#) but it's still in Discuss in Committee. Our records don't

# Taxonomy Committee Notes

show the Darwin Core field but the LSID is in the taxon metadata. OBIS no longer omits ~1,000 of our records because of homonyms so it's working ok and we could move it to Propose to Close. I would propose to close unless we want to pursue using the LSID as a means of dealing with homonyms. The OBIS issue is definitely resolved.

- Is this still a possibility? [Feature Request - display\\_name \(taxonomy / classifications\)#6302](#)
  - The struggle is that every classification source is structured differently (WoRMS vs. others). Would be very, very complicated
- <https://github.com/ArctosDB/arctos/issues/6523> Comment from July: "Until someone needs to use a subgenus as an identification - this seems like something we don't need to deal with." We create strings almost every day to deal with (invalid) subgenera in the legacy IDs. Is there any other solution we're pursuing?
  - DMNS:Inv makes identification strings to get around this issue
  - If a collection needs a subgenus as an accepted (#1) identification, then we'll need a better approach to subgenera. Currently, for DMNS:Inv, all the names with subgenera are unaccepted per WoRMS. We could close the issue for now.
- <https://github.com/ArctosDB/arctos/issues/6731> This is interesting... where is the discussion at?
  - Teresa to add

## 2023-09-14

### Participants

Teresa

### Topics for Discussion

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## 2023-07-18

### Participants

Dusty, Phyllis, Genna, Teresa

### Topics for Discussion

- <https://github.com/ArctosDB/arctos/issues/5814> Isids for OBIS
  -

# Taxonomy Committee Notes

- LSID is in the classification, in production. In test: we are pulling the entire classification and metadata into flat from the source that is preferred from the collection.
- Possible solution: Add “dwc:scientificNameID” optional field as identification attribute. LSID can go in this field.
- OBIS is on the cutting edge of this data; more data will be coming into Arctos soon that will need this functionality.
- Question: how is OBIS treating this data? Do they have someone that can go through this? (Abby) GBIF has their taxonomic backbone, so they default to that.
- Ocean Genome uses the scientificNameID field from WoRMS as well
- -> Dusty thinks it's worth looking into the JSON first before defaulting to pulling the LSID into a field manually
- Genna will file issue ! Code table request (will do by end of day 2023-07-18)
- <https://github.com/ArctosDB/arctos/issues/6385> taxonomic disagreements
- <https://github.com/ArctosDB/arctos/issues/6523> subgenera and using them
  - Dusty: Is this a taxonomy or classification issue? Can we tackle it with UI?
  - Cannot create a name with a parentheses to avoid making duplicates that indicate the same taxon
  - Until someone needs to use a subgenus as an identification - this seems like something we don't need to deal with
- <https://github.com/ArctosDB/arctos/issues/6302>
  - 2 components to this issue: more visible things, and the place where that thing comes from.

2023-05-11

## Participants

Phyllis, Genna, Teresa

## Topics for Discussion

- <https://github.com/ArctosDB/arctos/issues/6281>
  - Can we see the list of terms in use when searching?
  - Probably requires occasional cleanup - (semiannual?) review of unique term types in use for misspellings, etc. - a task for this committee
- Clean up identification remarks - see [🇺🇸 Identification Remarks Cleanup](#)
  - Wait until bulkloader rebuild is complete for better recommendations about where data should go.
- Meet in two months - nothing is really urgent right now.

# Taxonomy Committee Notes

2023-03-09

## Participants

Teresa MM, Lindsey F., Genna A. Phyllis S.

## Topics for Discussion

Propose to Close

## Requested Documentation

We need better documentation on when you should make taxonomy updates.

- Come to Documentation-A-Thon and write this as a group! March 14 1-4 PM MDT

## For Discussion

1. [Finding Endangered/Threatened Species](#) - let's make this a formal request for a taxonomy source if it does what Jessica needs.
2. [Change all references in "Scientific Name Check" Tool to Taxon Name #3258](#) - bring to working group for prioritization with de-specimens and UI consistency - added to April agenda
3. [Using identifiers for taxa - scientificNameID #4776](#) - Teresa propose mapping for `dwc:ScientificNameID` using `Isid` (add that OGL will want this!) New issue created also added to AWG - this should be easy? <https://github.com/ArctosDB/arctos/issues/5814>
4. [Enhancement - Ability to select a common name for a collection #5025](#)
5. [Author of taxon name not visible in ID on catalog record #3609](#) - Teresa to open a new code table issue to add "authority" and build scientific name for Worms (via Arctos) users using that. - new issue created <https://github.com/ArctosDB/arctos/issues/5794>
6. [identification remarks - are overburdened and need cleanup #4922](#)
7. [Taxon name qualifications in Darwin Core #2680](#)
8. [hierarchical editor operations performance #3607](#)
9. [Code Table Request - Additions to nature of ID code table for art collections #3288](#)
10. [Make the Taxon Name Validator Tool Better #3101](#)
11. [A method for distinguishing homonyms #4794](#)

## WoRMS (via Arctos) Issues

12. [Taxonomy Search Results do not show if WoRMS \(via Arctos\) metadata shows "accepted" or "not accepted" #4777](#)



# Taxonomy Committee Notes

## AWG Issues Agenda

### Approved for Implementation

13. [Bulkload common names #4815](#)
14. [Feature Request - Make Nature of ID an attribute of identifications #4829](#)
15. [Allow variably ranked acceptedness of identifications \(was: order identifications on catalog record\) #3540](#) - get clarification on ranking after migration and then bring to AWG next month

## Meeting Chat

2023-01-12

## Participants

Teresa, Lindsey, Genna, Phyllis, Jessica

## Topics for Discussion

### Propose to Close

### Requested Documentation

We need better documentation on when you should make taxonomy updates.

### For Discussion

16. [Using identifiers for taxa - scientificNameID #4776](#)
  - a. Proposed solution is: IF you are using a taxon name and it has an Aphia ID in WoRMS, whether you are using that or not, it should be associated with your data. OR, it only gets associated if you are using WoRMS. Need to decide.
  - b. Have a specific source for homonyms? Only time you use it is when you have homonyms
17. [Finding Endangered/Threatened Species](#)
  - a. What would be the most useful? Report, code table, attribute, csv download from somewhere (???), a new source?
  - b. If we go with a new source, what is the source? USFWS, IUCN Red List, a general "Conservation Status"?
18. [Enhancement - Ability to select a common name for a collection #5025](#) - ranking names and marking some to remain hidden (for problematic names) - add to issue

# Taxonomy Committee Notes

19. [Author of taxon name not visible in ID on catalog record #3609](#)
20. [identification remarks - are overburdened and need cleanup #4922](#)
21. [Taxon name qualifications in Darwin Core #2680](#)
22. [Change all references in "Scientific Name Check" Tool to Taxon Name #3258](#)
23. [Limit search on identification to a single type of taxonomy term #4864](#)
24. [hierarchical editor operations performance #3607](#)
25. [Code Table Request - Additions to nature of ID code table for art collections #3288](#)
26. [Make the Taxon Name Validator Tool Better #3101](#)
27. [A method for distinguishing homonyms #4794](#)

## WoRMS (via Arctos) Issues

28. [Taxonomy Search Results do not show if WoRMS \(via Arctos\) metadata shows "accepted" or "not accepted" #4777](#)

## AWG Issues Agenda

### Approved for Implementation

29. [Bulkload common names #4815](#)
30. [Feature Request - Make Nature of ID an attribute of identifications #4829](#)
31. [Allow variably ranked acceptedness of identifications \(was: order identifications on catalog record\) #3540](#) - get clarification on ranking after migration and then bring to AWG next month

## Meeting Chat

From Me to Everyone 11:02 AM

[https://docs.google.com/document/d/1gxMD9uzsyGI2zKaMitQ\\_6tH33G9RUoVpwDWzUB2Xxmw/edit#](https://docs.google.com/document/d/1gxMD9uzsyGI2zKaMitQ_6tH33G9RUoVpwDWzUB2Xxmw/edit#)

From Genevieve Anderegg (she/her) to Everyone 11:05 AM

Phyllis is on her way

From Lindsey Frederick to Everyone 11:45 AM

I will brb

From Genevieve Anderegg (she/her) to Everyone 12:04 PM

I have to go get some specimens that are arriving to the museum - thanks for the meeting all!

From Lindsey Frederick to Everyone 12:05 PM

<https://arctos.database.museum/name/Mycale%20adhaerens>

## 2022-11-10

## Participants

Teresa Mayfield-Meyer, Jessica Weller, Angela Hornsby, Genevieve Anderegg, Phyllis Sharp

# Taxonomy Committee Notes

## Topics for Discussion

### Propose to Close

32. [Replace commas separating classification terms with pipes on catalog record page #4333](#) - agree, closed

### For Discussion

33. [Enhancement - Ability to select a common name for a collection #5025](#) - ranking names and marking some to remain hidden (for problematic names) - add to issue
34. [identification remarks - are overburdened and need cleanup #4922](#)
35. [Taxon name qualifications in Darwin Core #2680](#)
36. [Change all references in "Scientific Name Check" Tool to Taxon Name #3258](#)
37. [TPT Taxonomy from Global Names #4332](#)
38. [Limit search on identification to a single type of taxonomy term #4864](#)

### WoRMS (via Arctos) Issues

39. [Need ability to add taxon names and classifications from WoRMS into WoRMS \(via Arctos\) on command #4784](#) - Teresa needs a walkthrough! But hey, why aren't we using trees?
40. [Taxonomy Search Results do not show if WoRMS \(via Arctos\) metadata shows "accepted" or "not accepted" #4777](#)
41. [Author of taxon name not visible in ID on catalog record #3609](#)
42. [A method for distinguishing homonyms #4794](#)

### In Progress

### AWG Issues Agenda

43. [Feature Request - Make Nature of ID an attribute of identifications #4829](#)
44. [Allow variably ranked acceptedness of identifications \(was: order identifications on catalog record\) #3540](#) - get clarification on ranking after migration and then bring to AWG next month

2022-09-07

### Participants

Teresa Mayfield-Meyer, Jessica Weller, Angela Hornsby, Genevieve Anderegg, Phyllis Sharp

# Taxonomy Committee Notes

## Topics for Discussion

### Propose to Close

1. [Replace commas separating classification terms with pipes on catalog record page #4333](#)

### For Discussion

1. [Feature Request - Make Nature of ID an attribute of identifications #4829](#) = see #4
2. [Allow variably ranked acceptedness of identifications \(was: order identifications on catalog record\) #3540](#) - get clarification on ranking after migration and then bring to AWG next month
3. [hierarchical editor operations performance #3607](#)
4. [identification remarks - are overburdened and need cleanup #4922](#) - see #1
5. [Taxon name qualifications in Darwin Core #2680](#)
6. [Change all references in "Scientific Name Check" Tool to Taxon Name #3258](#)
7. [TPT Taxonomy from Global Names #4332](#)
8. [Limit search on identification to a single type of taxonomy term #4864](#)
9. [Enhancement - Ability to select a common name for a collection #5025](#) - ranking names and marking some to remain hidden (for problematic names) - add to issue
10. [Using identifiers for taxa - scientificNameID #4776](#)

### WoRMS (via Arctos) Issues

1. [Need ability to add taxon names and classifications from WoRMS into WoRMS \(via Arctos\) on command #4784](#) - Teresa needs a walkthrough! But hey, why aren't we using trees? -Phyllis to create a Zoom recording.
2. [Taxonomy Search Results do not show if WoRMS \(via Arctos\) metadata shows "accepted" or "not accepted" #4777](#) - Phyllis to close
3. [Author of taxon name not visible in ID on catalog record #3609](#) - Phyllis to close
4. [A method for distinguishing homonyms #4794](#)

### In Progress

1. [Feature Request - taxonomy source anchors should not be split #3973](#)