Training 2A: Adding New Names or Updating Names in the BOLD Database

By D. Jean Lodge

This training slide set covers how to:

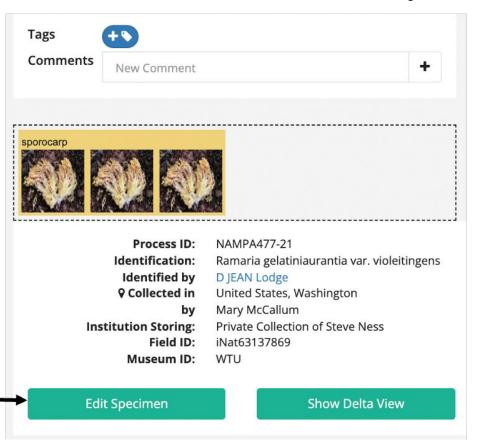
- Add species names not in the BOLD Database, including Genus cf. species & Genus aff. species.
- Add names of genera to the BOLD Database
- Inform BOLD that a species in their database has been moved to another genus (recombined) or a genus has been moved to a different family.
- If needed, documenting that the name of a species you want to use is legitimate and validly published, even though Index Fungorum says it is a synonym of another species that was described elsewhere.

First Mark the records flagged for name changes in BOLD Check that the name hasn't already been updated in ID. If it has, delete the rename flag and flag it as 'validated'. If not, proceed with instructions to Add name to BOLD DB.

0	Cortinarius amnicola	TJR0073	NAMPA063-19	9)	1	2	11111		665[0n]	• identification_corrected
	Inocybe glaucescens	TJR0074	NAMPA064-19	•	,	1	2			666[3n]	◆ Add_Inocybe_glaucescens_to_BOLD_DB ◆ sequence_recovered
	Stereum gausapatum	TJR0075	NAMPA065-19	9)	1	2			605[0n]	• species_complex

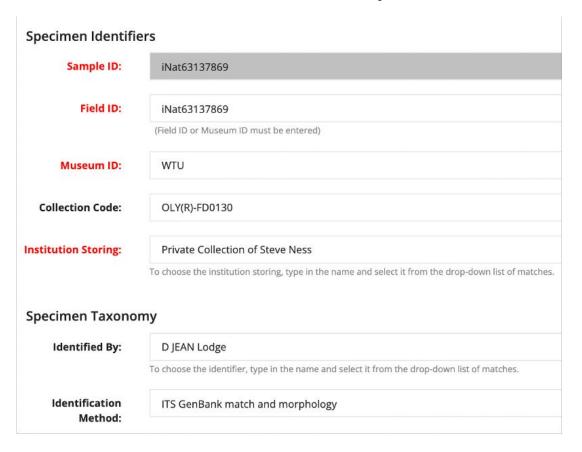
Rimbachia neckerae	MO453442	NAMPA1320-21	1019	9	1	2			553[0n]	♦ Lab-Mixup_or_contamination_mismatch
Lactocollybia	MO453469	NAMPA1321-21	1019	•	1	2	11111		692[2n]	● Jean_ADD_Lactocollybia_cfangioispermarum_to_BOLD_DB ● Mis-identified_as_Phloeomana_hiemalis

Check if the name has already been updated in ID



- •About 1 in 4 names that have a flag saying 'Jean add XXX yyyy to the Bold DB' or Jean add XXX cf./aff. yyyy to the Bold DB' already exist in the Bold Database.
- •To check if it is really missing from the BOLD database, open Edit Specimen

Scroll down to Edit Specimen and hit that link



If Museum ID is blank, start typing FunDis & it will autofill. The red boxes are no longer mandatory, so you can save changes if left blank.

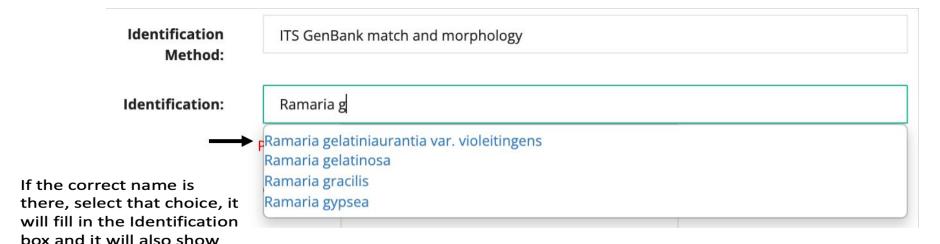
Check that the name is in the Database

up below in species and

and Family.

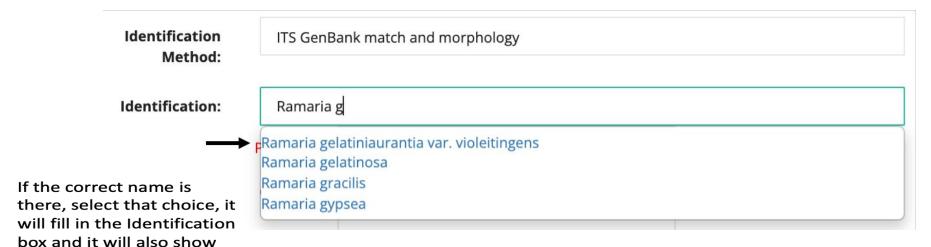
fill in the names of Order

Scroll down to Identification and start typing the name
you will get a pulldown menu that may have the name.



Select the name you want from the pull-down menu Afterwards, add a flag to the record the saying 'Validated'

If the name you want has a 'cf.' or 'aff.' between Genus and species, or is followed by 'group' or 'species complex'
Start typing it with the 'cf.' or 'aff. Following the genus name

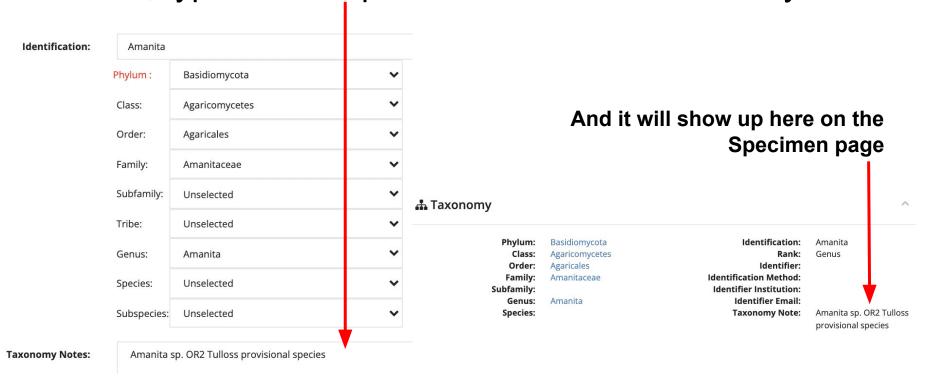


up below in species and

and Family.

fill in the names of Order

Select the name you want from the pull-down menu Afterwards, add a flag to the record the saying 'Validated' If the name you want to use is a provisional name (not yet published), don't add it to the BOLD DB Instead, type that in Specimen > Edits > 'Taxonomy notes'



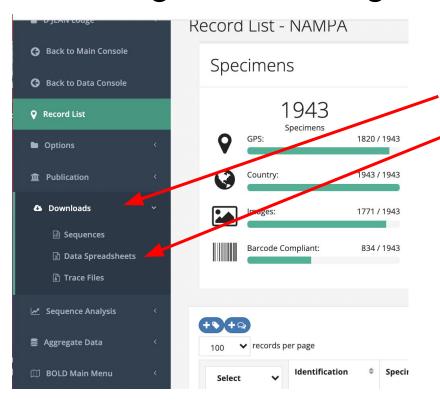
Remember to scroll to the bottom and hit Submit then add a flag to the record

Elevation Accuracy:		meters	○ feet	○ yards		
Depth:		● meters ○ km	○ feet	yards		
Depth Accuracy:		meters km) feet	yards		
Collection Notes:	Stains violet immedia	itely. Soil. Old growth her	nlock 3500ft			
Images					Li .	/
Upload Image						/
sporocarp						Submit

If you added information at the top, but the name wasn't in the database, hit the Submit button anyway to be sure to save the info in any critical Red boxes you filled.

If you successfully updated the name, remove the 'to-do' flag and Add a flag saying flag saying name was changed to, e.g., XXX cf. yyyy 'Validated' or Done

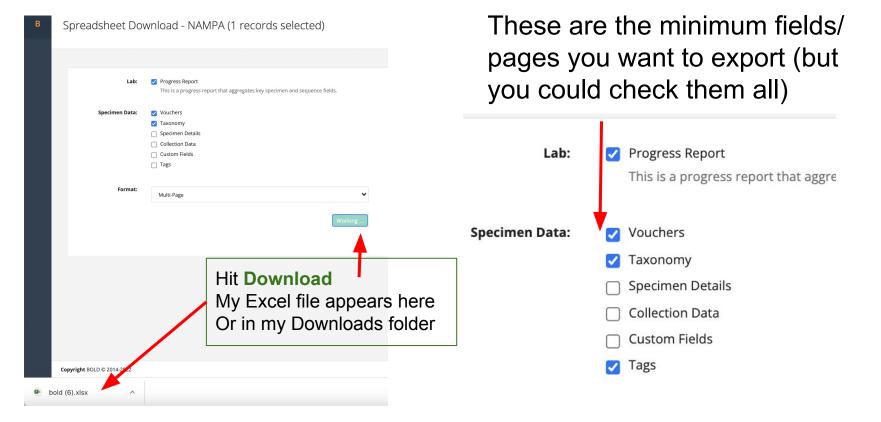
Second: Download data from the marked records needing name changes in BOLD into an Excel File



Go to **Downloads**, & take the 2nd choice:

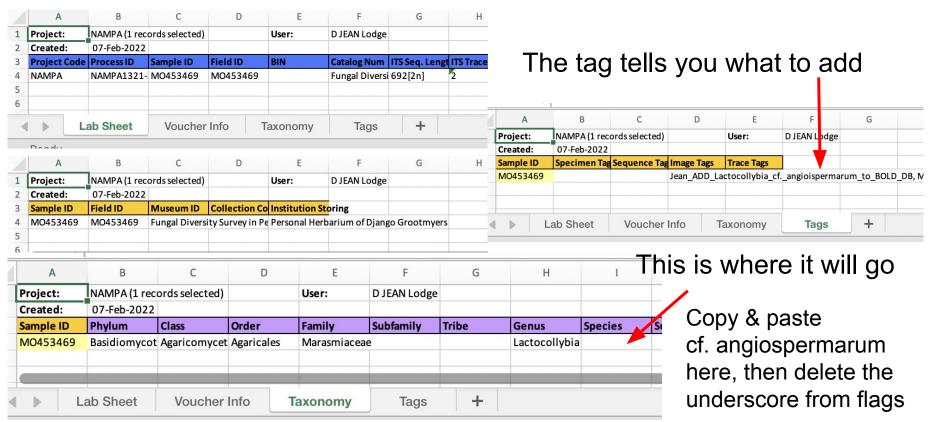
Data spreadsheets

Pop-up Download Data Request form in BOLD



Excel xlsx spreadsheet from BOLD download

Save the file as a 1997 xls file. Upload in BOLD only accepts xls (not xlsx)

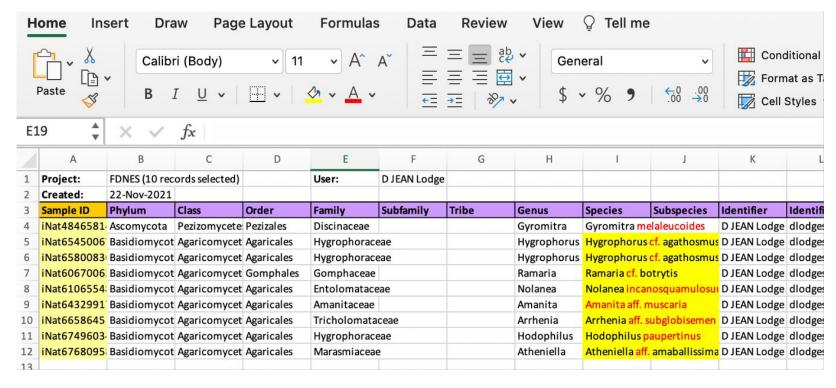


The new Taxonomy tab looks like this with species added Use red or another color to indicate added or changed names

	Α	В	С	D	E	F	G	Н	1	
1	Project:	NAMPA (1 records selected)		User:		D JEAN Lodge				
2	Created:	07-Feb-2022								
3	Sample ID	Phylum	ım Class		Family	Subfamily	Tribe	Genus	Species	Subs
4	MO453469	Basidiomycot	Agaricomycet Agaricales		Marasmiace	ae		Lactocollybia	cf. angiospermarum	
5										
6										
4	▶ L	ab Sheet	Voucher	Info	Taxonomy	Tags	+			

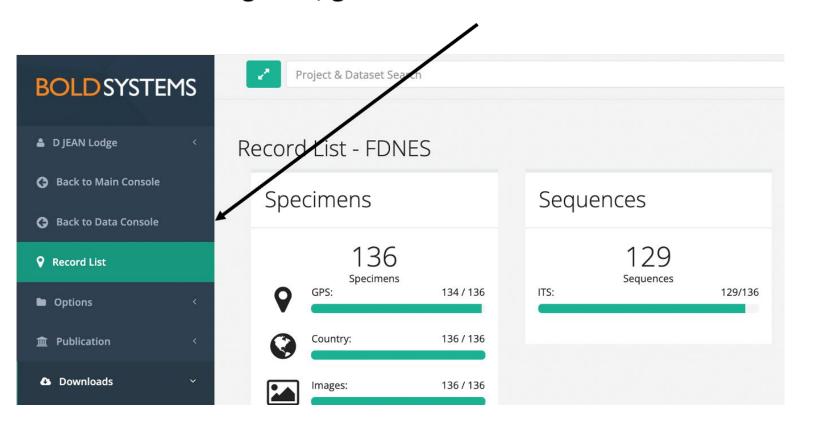
Here is a more extensive data sheet with Taxonomy changes submitted via batch upload in BOLD

Yellow highlights were added AFTER the updates were processed to indicate success The first update failed & had to be resubmitted.

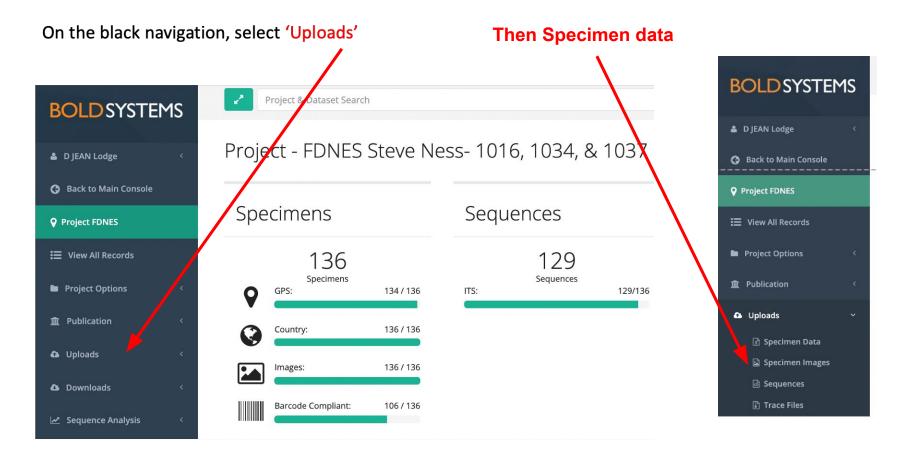


Using Batch Upload to submit Taxonomy updates

On the black navigation, go back out one level to 'Back to Data Console'

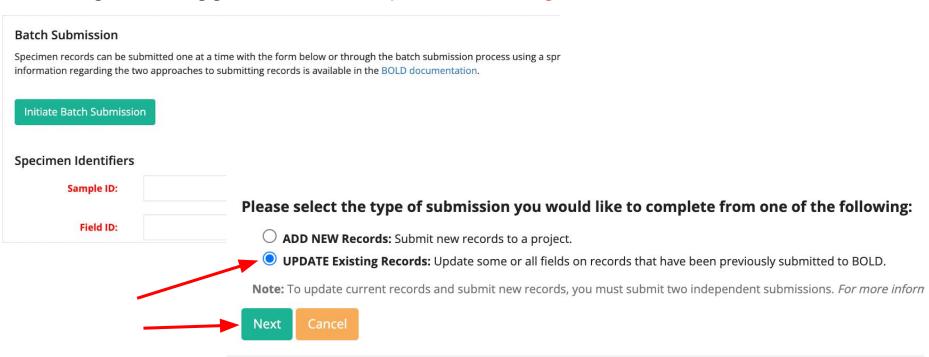


Using Batch Upload to submit Taxonomy updates



Submitting Taxonomy Updates using Batch Upload

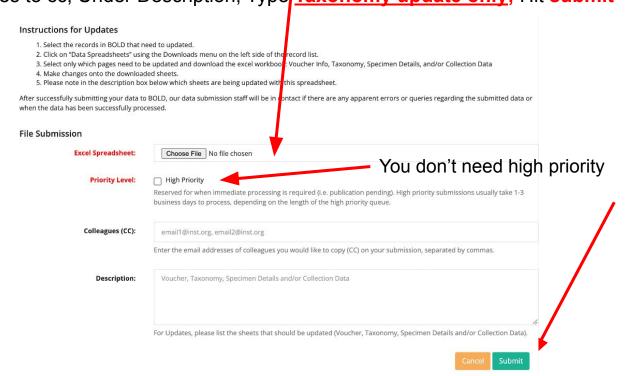
Select the green button 'Initiate Batch Submission' then Change the toggle switch to 'Update Existing Records' & hit Next



Submitting Taxonomy Updates using Batch Upload

Choose your edited Excel file to upload (make sure it is xls, not xlsx format)

Add the email addresses to cc; Under Description, Type Taxonomy update only; Hit submit



Proofing Taxonomy Updates & Answering Queries

Remember to go back and proof that all the requested changes were made

- Highlight each successfully changed record, and resubmit the failures
- Only genus or species can be changed in one request. If both need to be changed
 in the same record, submit genus, then submit a new request for species.
- If BOLD taxonomists ask for proof that a name is validly published & legitimate, see
 How to get maximal information from Index Fungorum, take a screen shot of the information in Index Fungorum for that name, and email it to them in a reply.

Complex additions of genera names or change in family You have to add the genus before you can add the species

Dear Miduna Rahulan,

The name for Postia guttulata in the Polyporaceae has been recombined in a new genus (2018), Calcipostia. Please add this to the database so we can update the records. See

Sincerely,

below

D. Jean Lodge



Index Fungorum

Record Details:

Postia guttulata (Sacc.) Jülich, Persoonia 11(4): 423 (1982)

Basionym:

Polyporus guttulatus Sacc. 1888

Citations in published lists or literature:

Index of Fungi 5: 171

Position in classification:

Dacryobolaceae, Polyporales, Incertae sedis, Agaricomycetes, Agaricomycotina, Basidiomycota, Fungi

Species Fungorum current name:

Calcipostia guttulata (Sacc.) B.K. Cui, L.L. Shen & Y.C. Dai, in Shen, Wang, Zhou, Xing, Cui & Dai 2018

Add the genus before adding the species (2)

The name for Postia guttulata in the Polyporaceae has been recombined in a new genus (2018), Calcipostia. Please add this to the database so we can update the records. See below.

Sincerely,

D. Jean Lodge



Species Fungorum

Synonymy See Note

Current Name:

Calcipostia guttulata (Sacc.) B.K. Cui, L.L. Shen & Y.C. Dai, in Shen, Wang, Zhou, Xing, Cui & Dai, Persoonia

Synonymy:

Oligoporus guttulatus (Sacc.) Gilb. & Ryvarden, Mycotaxon 22(2): 365 (1985)

Polyporus grantii Lloyd, Mycol. Writ. (Cincinnati) 5: 763 (1918)

Polyporus guttulatus Sacc., Syll. fung. (Abellini) 6: 106 (1888)

Polyporus maculatus Peck, Ann. Rep. N.Y. St. Mus. nat. Hist. 26: 69 (1874) [1873]

Polyporus substipitatus (Murrill) Murrill, Mycologia 4(4): 217 (1912)

Polyporus tiliophilus (Murrill) Sacc. & Trotter, Syll. fung. (Abellini) 21: 281 (1912)

Postia guttulata (Sacc.) Jülich, Persoonia 11(4): 423 (1982)

Spongiporus guttulatus (Sacc.) A. David, Bull. mens. Soc. linn. Lyon 49(1): 17 (1980)

Tyromyces guttulatus (Sacc.) Murrill, N. Amer. Fl. (New York) 9(1): 31 (1907)

Tyromyces stipticus f. guttulatus (Sacc.) Domański, Orloś & Skirg., Flora Polska. Grzyby, II: 135 (1967)

Tyromyces substipitatus Murrill, Mycologia 4(2): 96 (1912)

Tyromyces tiliophilus Murrill [as 'tiliophila'], N. Amer. Fl. (New York) 9(1): 33 (1907)

Synonymy Contributor(s):

Kew Mycology (2019)