

# 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.

<input type="checkbox"/>	Cortinarius amnicola	TJR0073	NAMPA063-19		📍	1	2				665[0n]	🔔 identification_corrected
<input type="checkbox"/>	Inocybe glaucescens	TJR0074	NAMPA064-19		📍	1	2				666[3n]	🔔 Add_Inocybe_glaucescens_to_BOLD_DB 🔔 sequence_recovered
<input type="checkbox"/>	Stereum gausapatum complex	TJR0075	NAMPA065-19		📍	1	2				605[0n]	🔔 species_complex


<input type="checkbox"/>	Rimbachia neckerae	MO453442	NAMPA1320-21	1019	📍	1	2				553[0n]	🔔 Lab-Mixup_or_contamination_mismatch
<input type="checkbox"/>	Lactocollybia	MO453469	NAMPA1321-21	1019	📍	1	2				692[2n]	🔔 Jean_ADD_Lactocollybia_cf_angioispermorum_to_BOLD_DB 🔔 Mis-identified_as_Phloeomania_hiemalis

# Check if the name has already been updated in ID


Tags 

Comments  

sporocarp



**Process ID:** NAMPA477-21  
**Identification:** Ramaria gelatiniaurantia var. violeitingens  
**Identified by** [D JEAN Lodge](#)  
**♀ Collected in** United States, Washington  
**by** Mary McCallum  
**Institution Storing:** Private Collection of Steve Ness  
**Field ID:** iNat63137869  
**Museum ID:** WTU

 [Edit Specimen](#) [Show Delta View](#)

- 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

### Specimen Identifiers

**Sample ID:** iNat63137869

**Field ID:** iNat63137869

(Field ID or Museum ID must be entered)

**Museum ID:** WTU

**Collection Code:** OLY(R)-FD0130

**Institution Storing:** Private Collection of Steve Ness

To choose the institution storing, type in the name and select it from the drop-down list of matches.

### Specimen Taxonomy

**Identified By:** D JEAN Lodge

To choose the identifier, type in the name and select it from the drop-down list of matches.

**Identification Method:** ITS GenBank match and morphology

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

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

**Identification Method:** ITS GenBank match and morphology

**Identification:** Ramaria g

→ [Ramaria gelatiniaurantia var. violeitingens](#)  
[Ramaria gelatinosa](#)  
[Ramaria gracilis](#)  
[Ramaria gypsea](#)

If the correct name is there, select that choice, it will fill in the Identification box and it will also show up below in species and fill in the names of Order and Family.

**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

Identification  
Method:

ITS GenBank match and morphology

Identification:

Ramaria g|

→ *Ramaria gelatiniaurantia* var. *violeitingens*  
*Ramaria gelatinosa*  
*Ramaria gracilis*  
*Ramaria gypsea*

If the correct name is there, select that choice, it will fill in the Identification box and it will also show up below in species and fill in the names of Order and Family.

**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'

Identification:

	Amanita	
Phylum :	Basidiomycota	▼
Class:	Agaricomycetes	▼
Order:	Agaricales	▼
Family:	Amanitaceae	▼
Subfamily:	Unselected	▼
Tribe:	Unselected	▼
Genus:	Amanita	▼
Species:	Unselected	▼
Subspecies:	Unselected	▼

Taxonomy Notes:

Amanita sp. OR2 Tulloss provisional species

And it will show up here on the  
Specimen page

 Taxonomy

Phylum: Basidiomycota  
Class: Agaricomycetes  
Order: Agaricales  
Family: Amanitaceae  
Subfamily:  
Genus: Amanita  
Species:

Identification: Amanita  
Rank: Genus  
Identifier:  
Identification Method:  
Identifier Institution:  
Identifier Email:  
Taxonomy Note: Amanita sp. OR2 Tulloss provisional species



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

The form contains the following elements:

- Elevation Accuracy:** A text input field followed by radio buttons for meters (selected), km, feet, and yards.
- Depth:** A text input field followed by radio buttons for meters (selected), km, feet, and yards.
- Depth Accuracy:** A text input field followed by radio buttons for meters (selected), km, feet, and yards.
- Collection Notes:** A text area containing the text "Stains violet immediately. Soil. Old growth hemlock 3500ft".
- Images:** A section with an "Upload Image" button and three small images of sporocarps. The label "sporocarp" is positioned above the images.
- Submit:** A green button at the bottom right of the form, indicated by a black arrow.

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 'Validated' or Done** flag saying name was changed to, e.g., XXX cf. yyyy

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

Record List - NAMPA

Specimens

1943  
Specimens

GPS: 1820 / 1943

Country: 1943 / 1943

Images: 1771 / 1943

Barcode Compliant: 834 / 1943

+ records per page

100 records per page

Select Identification Specir

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

# Pop-up Download Data Request form in BOLD

B Spreadsheet Download - NAMPA (1 records selected)

**Lab:**  Progress Report  
This is a progress report that aggregates key specimen and sequence fields.

**Specimen Data:**  Vouchers  
 Taxonomy  
 Specimen Details  
 Collection Data  
 Custom Fields  
 Tags

**Format:** Multi-Page

Working ...

Hit **Download**  
My Excel file appears here  
Or in my Downloads folder

Copyright BOLD © 2014-2022

bold (6).xlsx

These are the minimum fields/  
pages you want to export (but  
you could check them all)

**Lab:**  Progress Report  
This is a progress report that aggregates key specimen and sequence fields.

**Specimen Data:**  Vouchers  
 Taxonomy  
 Specimen Details  
 Collection Data  
 Custom Fields  
 Tags

# Excel xlsx spreadsheet from BOLD download

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

Project Code	Process ID	Sample ID	Field ID	BIN	Catalog Num	ITS Seq. Length	ITS Trace
NAMPA	NAMPA1321	MO453469	MO453469		Fungal Diversi	692[2n]	2

The tag tells you what to add

Sample ID	Field ID	Museum ID	Collection Co	Institution Storing
MO453469	MO453469	Fungal Diversity Survey in Pe	Personal Herbarium of Django Grootmyers	

Sample ID	Specimen Tag	Sequence Tag	Image Tags	Trace Tags
MO453469			Jean_ADD_Lactocollybia_cf_	angiospermarum_to_BOLD_DB,N

Sample ID	Phylum	Class	Order	Family	Subfamily	Tribe	Genus	Species
MO453469	Basidiomycot	Agaricomycet	Agaricales	Marasmiaceae			Lactocollybia	

This is where it will go


Copy & paste  
cf. angiospermarum  
here, then delete the  
underscore from flags

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

	A	B	C	D	E	F	G	H	I	
1	<b>Project:</b>	NAMPA (1 records selected)			<b>User:</b>	D JEAN Lodge				
2	<b>Created:</b>	07-Feb-2022								
3	<b>Sample ID</b>	<b>Phylum</b>	<b>Class</b>	<b>Order</b>	<b>Family</b>	<b>Subfamily</b>	<b>Tribe</b>	<b>Genus</b>	<b>Species</b>	<b>Subs</b>
4	MO453469	Basidiomycot	Agaricomycet	Agaricales	Marasmiaceae			Lactocollybia	cf. angiospermarum	
5										
6										

◀	▶	Lab Sheet	Voucher Info	<b>Taxonomy</b>	Tags	+	
---	---	-----------	--------------	-----------------	------	---	--





# Using Batch Upload to submit Taxonomy updates

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

The screenshot displays the BOLD Systems interface. On the left is a dark blue navigation sidebar with the BOLD SYSTEMS logo at the top. Below the logo, the user is identified as 'D JEAN Lodge'. The sidebar contains several menu items: 'Back to Main Console', 'Back to Data Console', 'Record List' (which is highlighted in green), 'Options', 'Publication', and 'Downloads'. An arrow points from the 'Back to Data Console' link in the sidebar to the main content area. The main content area has a search bar at the top labeled 'Project & Dataset Search'. Below the search bar, the title 'Record List - FDNES' is displayed. The main content is divided into two panels: 'Specimens' and 'Sequences'. The 'Specimens' panel shows a total of 136 specimens, with a progress bar for 'GPS:' at 134/136, 'Country:' at 136/136, and 'Images:' at 136/136. The 'Sequences' panel shows a total of 129 sequences, with a progress bar for 'ITS:' at 129/136.

**BOLD SYSTEMS**

D JEAN Lodge

- Back to Main Console
- Back to Data Console
- Record List**
- Options
- Publication
- Downloads

Project & Dataset Search

## Record List - FDNES

### Specimens

136 Specimens

GPS: 134 / 136

Country: 136 / 136

Images: 136 / 136

### Sequences

129 Sequences

ITS: 129 / 136

# Using Batch Upload to submit Taxonomy updates

On the black navigation, select 'Uploads'

Then Specimen data

The screenshot displays the BOLD SYSTEMS interface for a project named 'FDNES Steve Ness- 1016, 1034, & 1037'. The interface is divided into two main sections: 'Specimens' and 'Sequences'. The 'Specimens' section shows 136 total specimens, with progress bars for various attributes: GPS (134/136), Country (136/136), Images (136/136), and Barcode Compliant (106/136). The 'Sequences' section shows 129 total sequences, with a progress bar for ITS (129/136). The left navigation menu is highlighted, showing 'Uploads' selected. The right navigation menu is also highlighted, showing 'Specimen Data' selected under the 'Uploads' dropdown.

**BOLD SYSTEMS**

D JEAN Lodge <

Back to Main Console

**Project FDNES**

View All Records

Project Options <

Publication <

**Uploads** <

Downloads <

Sequence Analysis <

Project & Dataset Search

Project - FDNES Steve Ness- 1016, 1034, & 1037

**Specimens**

136  
Specimens

GPS: 134 / 136

Country: 136 / 136

Images: 136 / 136

Barcode Compliant: 106 / 136

**Sequences**

129  
Sequences

ITS: 129 / 136

**BOLD SYSTEMS**

D JEAN Lodge <

Back to Main Console

**Project FDNES**

View All Records

Project Options <

Publication <

**Uploads** >

Specimen Data

Specimen Images

Sequences

Trace Files



# Submitting Taxonomy Updates using Batch Upload

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

## Batch Submission

Specimen records can be submitted one at a time with the form below or through the batch submission process using a spreadsheet. For more information regarding the two approaches to submitting records is available in the [BOLD documentation](#).

Initiate Batch Submission

## Specimen Identifiers

Sample ID:

Field ID:

Please select the type of submission you would like to complete from one of the following:

- ADD NEW Records:** Submit new records to a project.
- UPDATE Existing Records:** Update some or all fields on records that have been previously submitted to BOLD.

**Note:** To update current records and submit new records, you must submit two independent submissions. *For more information*

Next

Cancel

# 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**

## Instructions for Updates

1. Select the records in BOLD that need to be updated.
2. Click on "Data Spreadsheets" using the Downloads menu on the left side of the record list.
3. Select only which pages need to be updated and download the excel workbook: Voucher Info, Taxonomy, Specimen Details, and/or Collection Data
4. Make changes onto the downloaded sheets.
5. Please note in the description box below which sheets are being updated with this spreadsheet.

After successfully submitting your data to BOLD, our data submission staff will be in contact if there are any apparent errors or queries regarding the submitted data or when the data has been successfully processed.

## File Submission

**Excel Spreadsheet:**

Choose File No file chosen

**Priority Level:**

High Priority

Reserved for when immediate processing is required (i.e. publication pending). High priority submissions usually take 1-3 business days to process, depending on the length of the high priority queue.

**Colleagues (CC):**

email1@inst.org, email2@inst.org

Enter the email addresses of colleagues you would like to copy (CC) on your submission, separated by commas.

**Description:**

Voucher, Taxonomy, Specimen Details and/or Collection Data

For Updates, please list the sheets that should be updated (Voucher, Taxonomy, Specimen Details and/or Collection Data).

Cancel

Submit

You don't need high priority

# 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 below.

Sincerely,

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:**  
Dacrybolaceae, 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. & Ryvar den**, *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)