Minutes from the workshop on mark up tools and implementations

Natural History Museum London, 24-25.11.2011

Milestone 6.12: Workshop on mark up tagging tools and implementations at TDWG

Leading partner: Pensoft

Related to:
M7.11 - Review of options for interactive mark up tools within the Scratchpad infrastructure
M7.10 - Agreement of standard format for community contributed bibliographies in conjunction with WP4
M7.12 - A suite of test cases that will be used to test the de-duplication software

Partipants:

Vincent Smith, David Roberts, Sandra Knapp, Simon Ryrcroft, Ben Scott, Vladimir Blagoderov, Irina Brake, Gordon Patterson, Laurence Livermore, Edward Baker (NHM); Nicola Nicholson, Irina Belyaeva, Cathrin Barker, Katherine Challis (Kew Gardens); Paul Kirk (Index Fungorum); Lyubomir Penev, Pavel Stoev, Teodor Georgiev (Pensoft)

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October 2011

ViBRANT WP6 meeting
24-25 Oct 2011
The Natural History Museum, London

Purpose

The overall purposes of the meeting is to discuss and improve the design and projected interface of the **Pensoft Writing Tool (PWT)** with practising taxonomists coming from different domains, such as fungi, plants and animals.

The **PWT** is a tool projected to combine two different processes known from conventional publishing into one - writing and submission of a manuscript - and in addition, to provide a detailed mark up of a structured text prior to submission. The **PWT** will be a key deliverable of the ViBRANT project and is expected to have a large impact on taxonomy publishing in the near future.

PWT will be implemented both as a stand-alone application and authoring tool within the Scratchpads infrastructure.

The outcome of the meeting will be reflected in the **PWT** design before starting the development work (1 Dec 2011).

Preparation

We assume that everyone attending the workshop should have had a look at the **PWT** design, and especially at the forms modelling the different taxonomic treatments, so that participants come up with concrete proposals for changes and improvements to the forms. To achieve this important goal, the **PWT** forms will be sent to the participants by 10th of October. Few additional or corrected forms might be sent in the week before the meeting, after they have been discussed at the TDWG in New Orleans.

Outline agenda

Monday, 24th of October 2011

9:30	Welcome and overview of the workshop (David Roberts)
9:40	The Pensoft Writing Tool (PWT): General idea and design (Lyubomir Penev)
10:00	The PWT within the Scratchpads infrastructure (Symon Rycroft, Ben Scott)
10:15	Discussion on the (1) PWT general idea and user interface
11:00	Coffee break
11:30	Discussion on the general manuscript template
13:00	Lunch (could be shorter if buffet lunch in NHM)
14:00	Discussion and simultaneous correction of the different treatments forms for botanical/mycological treatments
15:30	Tea
16:00	Discussion and simultaneous correction of the different treatments forms for botanical/mycological treatments
17:30	Summary of the first day and final discussion
18:00	Close

Tuesday, 25th of October 2011

9:30	Discussion and simultaneous correction of the different treatments forms for zoological treatments
11:00	Coffee break
11:30	Discussion and simultaneous correction of the different treatments forms for zoological treatments
13:00	Lunch (could be shorter if buffet lunch in NHM)
14:00	Summary and final discussion
15:30	Tea
16:00	Technical applicability and integration with the Scratchpads (Simon Rycroft, Ben Scott, Lyubomir Penev, Teodor Georgiev, and others who wish to participate)
18:00	Close

MINUTES

Lyubomir Penev presented the general concept and a preliminary design version of the Pensoft Writing Tool (PWT)

Ben Scott presented the functionalities and the prototype version of the Scratchpads publishing module

1. Can we have two nomencalure acts for 1 taxon in 1 treatement?
2. We could select those acts that are more often used in practice (e.g. neotype designation going together with redescription; or new status + lectotype designation + redescription).

3. In plants always new changes in ranks come from Basyonym; intermediade acts disappear from the names (t.e. variety description by Knapp, changed to subspecies by Penev and to Species by Stoev it will be A-us, bu-s (Knapp) Stoev – Penev disappears.)

4. To leave the Basyonym concept as non-compulsory field in Zoology, since it is very useful

5. Phototypes is used largely used – in Ptotista – not in the CODE; microorganisms – not obligatory to have a specimen. We need such version in the system.

6. Replacement name is = nomen novum in Plants; not so in Zoology – oldest synonym replaces the name in case in homonymy – i.e. nomenclature act.

7. Syn.n – nomenclature and taxonomic act – for ZooLogy and Botany – is compromise, because in Zoology this is nomenclature in Botany – taxonomic act.

8. Removal from synonymy – remains – nomen ressurectum – not.

9. In Botany – new name is = Replacement name. In zoology New name is = new described + new proposed (in case of homonymy)

10. Revalidated combination – not in Plants…to be left as Optional. Not sure in Zoology…

11. Nomenclature act leads to consequences. We are interested more in the consequences than in the nom act itself. We should clearly distinguish between them as the terminology in Zoological Record do.

12. Tautonimy is just a case of replacement name.

13. Formatting – will it remain after copy/pasting – YES.

14. To have a stand-alone version for PC not to work online. People would like it at least at the beginning.

15. To have an option to see/hide field boxes while typing.

16. To divide References to References properly cited in the text and Microcitations (Optinal)?

17. Vince suggested to link Microcitations (include also the exact page where the species is described) to LSIDs (like Genbank) and find a way to credit the original authors describing the species. We can't decide that right now.

18. Marine/ Terrestrial templates in Material descriptions after DarwinCore. Gordon Patterson offered a support to in defining and displaying the DwC fields that are most relevant to deccription of marine occurrence data; the marine organisms and perhaps also parasites should perhaps be designed in separate templates?

19. Desktop version to be compliant with the Local data base to import references to the paper when working offline.

20. To make a prototype to play with before launching the first official one (requested by the botanists).

21. Diagnosis or Description in Botany – Diagnosis is not mandatory. According to Vladimir Blagoderov, the Diagnosis in zoology shouldn't be mandatory.

22. Discussion when part of the taxon treatment could be renamed 'Taxon Discussion', to separate it from the General Discussion

23. Vincent Smith confirmed that the databases for occurrence records and references of Scratchpads could easily be used to export data to the PWT

24. Marine & freshwater terms in DarwinCore – to send them to Gordon to check them for relevance.

25. If the tool indeed will be User Friendly, it will need short explanations (help, vocabularies) of what exactly is needed to fill in in every field.

26. In Botany – for new taxon – down to subspecies-variety-form

27. For new name of plant we need: Holotype, collection name (either Index herbariorum, private herbarium or institution name+country), collection number.

28. National division level No 1, National Division level 2 instead of 'Province' in DarwinCore?

29. Field collector's number in Botany = Field number to be added for Botany....

30. In Botany – new combination with new rank; botanists use only New Combination – and never use the term New Status. In zoology New Combinations and new Status are separate treatments.

31. Za New Combination – in Botany we have special field for Basionym – Type of publication + page.

32. New synonym is not plasticized in Botany – no need of such a treatment

33. Figures are not mandatory for new extant species descriptions. For fossil plants they are!

34. Hybrid – we need to discuss this with botanists that do hybrids; also there is an option of creating hybrid genus. Example: Picea x abies Author; Parents - First parent field mandatory, second parent field – optional.

35. Hybrid genus pretty much as species…   Example: xPicea

36. We should have after the name "notogenus nova/ notospecies nova"

37. Parental genera of the hybrid - first parent field mandatory, second parent field – also mandatory. Otherwise it will be invalidly published. Description of new hybrid genus name is not mandatory. Would be good to have parental genera descriptions.

38. For clonal organisms, there is trend to describe syntypes instead of designating a holotype;

39. Hapantotype is a multiple holotype. Hapantotype is used for Protists and clonal organisms

40. If in a zoological description type locality data are not filled in, there should be a warning requesting a minimum locality data (even country, ocean).

41. Add a separate class of data for specifying characteristics of the new taxon (alien, invasive) or biotic relationship (host of, parasite of…).

42. Type horizon is a text field data; they should be situated after the type locality but should be entered manually in a text box.

43. Specimen CollectionID should be made visible on the template; each paratype goes with each own ID number.

44. In the ITIS submission form there are good vocabularies to characterise a name , separate from botany and zoology; use them.

45. Add NCBI classifaction in parallel to the COL/GBIF classification

46. Flag – make genomic data link better visible and then add other links (not mandatory)

47. Genomic data link: <Gene name> <link>

48. Add emendation and differ from name replacement and nomen novum; try to combine these into one and the same treatment.

49. Define better these treatments and put additional work on them.