**EDIT Platform - Referencing the taxon circumscription, synonym assignments, and taxon placements**

Use Case: Caryophyllales

Apart from the nomenclatural reference given with the name in abbreviated form, there are a number of bibliographic references relating to the taxonomy and classification of names in the Platform.

**Taxon circumscription**

The circumscription of the taxon is indicated by the secundum (sec.) reference , assigned to the taxon in the *Details View* of the *Name Editor*.

The *Taxon is doubtful* flag there indicates that the taxon is marked as such in the sec. reference.

If the name accepted for the taxon in the sec. reference differs from the one in the current classification, the *Name in Source* can be indicated.

**Synonymy and misapplication**

The source of the assignmnent of a synonym to a taxon is indicated in the *Details-View* of the *Name Editor* as the syn. sec. reference. Again, if that assignment was deemed doubtful in that reference, the *Synonym is doubtful* flag is set. [NB: If an editor for some reason wants to cast doubt on that assignment, this should be detailed in factual data (of the name or of the taxon). ]

A misapplied name has two references: the *sensu* reference indicates where the name was misapplied for the present taxon, the "error secundum" *(err. sec.)* reference indicates the source of the assignment to the present taxon. [The relationship itself is handled as a concept relationship internally, not as a synonym relationship.]

**Taxon placement**

The Placement is the position of the taxon in the classification tree; a taxon with placement is called a *Taxon Node.*

For pragmatic reasons some names are treated as Taxon nodes although they are not the names of a taxon. This is to make their correct placement possible, an example are excluded names. This is somewhat in analogy to the treatment of invalid designations as synonyms of a taxon, although they are not names in the nomenclatural sense.

Information about the placement is accessible via the *Taxon Node Dialogue*, where the *Placement source* indicates the reference responsible for the position of the taxon in the classification. This reference may define a special -> *Placement status.*

**Placement status**

The choice of placement status available will be configurable in the server-sided settings of the Platform instance.

In the *Taxon Node Dialog*, a *Placement status* and its source may be indicated:

(1) Taxon included in parent – *Included* - this is the default status, no symbol in Taxon navigator

(2) Taxon included in parent with doubts – *Doubtful* – symbol: ?

Both (1) and (2) denote taxa that are explicitly part of the taxonomic treatment. The following status indicate taxa and names (technically treated as taxon nodes) that for some reason are excluded or not completely included in the treatment, but nevertheless placed somewhere. The placement can be in a Pseudotaxon node, as exercised e.g. in the Nepenthaceae and Cactaceae treatments, but it can also be, e.g., a genus when the species name refers to that genus.

(3) Taxon accepted (or probably to be accepted) but no placement in the next higher rank possible, also refered to as incertae sedis – *Unplaced* – Symbol: ??

E.g. a taxon assigned to a genus that has been split into several genera, but assignment to one of them is not [yet] possible[[1]](#footnote-1), or a genus that can not be assigned to any family.

(4) Taxon or name excluded from treatment – *Excluded* – symbol: ø

Maintained for compatibility, should better be specified as one of the cases (5) to (8).

(5) Taxon or name excluded, geographically out of scope – *Excluded geo. –* symbol: øg

E.g. a taxon that does not occur in the region of the flora treatment

(6) Taxon or name excluded, taxonomically out of scope – *Excluded tax. –* symbol: øt

Name being a taxon name or synonym belonging to a taxon that is not part of the treatment[[2]](#footnote-2).

(7) Name excluded for nomenclatural reasons – *Excluded nom. –* symbol:øn

E.g. an effectively published name ascribing the name to an author who merely and correctly cited an earlier name[[3]](#footnote-3)

(8) Name of verified uncertain application – *Uncertain application* – symbol: øa / ↑

(9) names that could not be clarified with the sources used and need further investigation
 – *Unresolved* – symbol: u

1. *Echinocereus penicilliformis* Linke in Wochenschr. Gärtnerei Pflanzenk. 1: 85. 1858. Sec. Britton & Rose (1922) **– CASE (no note)** [↑](#footnote-ref-1)
2. *Pomatotheca* F.Muell. - based on *Trianthema humillimum* F.Muell., a synonym of *Gigaspermum repens* (Hook.) Lindb., a moss [Hartmann 2017] – context: Caryophyllales treatment [↑](#footnote-ref-2)
3. *Achyranthes argentea* Thwaites - Cited as a synonym of *Achyranthes aspera* var.*sicula* in POWO [10 may 2022] and TPL (2013). Thwaites correctly cites the name with "Lam." as author, and although (as Hooker points out in The Flora of British India) this may be a misapplied name, Thwaites did not create a new name. [↑](#footnote-ref-3)