

## EDIT - feature request #9340

### Workflow support for secundum handling when making synonym a new accepted taxon

12/03/2020 03:36 PM - Andreas Müller

<b>Status:</b>	Closed	<b>Start date:</b>	
<b>Priority:</b>	New	<b>Due date:</b>	
<b>Assignee:</b>	Katja Luther	<b>% Done:</b>	100%
<b>Category:</b>	taxeditor	<b>Estimated time:</b>	0:00 hour
<b>Target version:</b>	Release 5.21		
<b>Severity:</b>	normal		
<b>Description</b>			
copied from <a href="#">#9267</a>			
(1) check above ticket for remaining issues. Most important is to have a preference to handle the workflow according to the project needs. Also the decision dialog can be improved.			
Preferences could be:			
<ul style="list-style-type: none"><li>• Always delete sec (without warning)</li><li>• warning, with option to immediately select new sec (buttons for old sec, new parent sec, old parent sec, or reference select dialog) + cancel</li><li>• Keep without warning if syn sec and new parent sec (and old parent sec(?) are the same, warn otherwise (this handles the default usecase very well)</li><li>• Keep always</li><li>• Always use new parent sec</li><li>• Always use old parent sec (???)</li></ul>			
(2) also we should check similar usecases. E.g. when making an accepted taxon a synonym the same check should be done. We should check all such operations			
This is a list of operations for testing:			
<ul style="list-style-type: none"><li>• change synonym to MAN/PP</li><li>• change synonym to accepted taxon</li><li>• change taxon to synonym</li><li>• change MAN/PP to synonym</li><li>• move synonym to another taxon</li><li>• move accepted to new parent</li></ul>			
<b>Related issues:</b>			
Related to EDIT - feature request #9523: Check secundum of homotypic synonyms...		<b>New</b>	
Related to EDIT - feature request #8922: Make setting of sec-Reference config...		<b>Duplicate</b>	
Related to EDIT - bug #9734: Correct handling for secundum references when mo...		<b>Closed</b>	
Related to EDIT - feature request #10255: Add additional option for sec refer...		<b>New</b>	
Copied from EDIT - bug #9267: No sec reference for move change Synonym to acc...		<b>Closed</b>	

#### Associated revisions

##### Revision 299adb56 - 02/22/2021 07:48 PM - Katja Luther

ref #9340: secundum ref workflow for synonym to taxon

##### Revision 44000ac1 - 02/23/2021 03:54 PM - Katja Luther

ref #9340: workflow for changing synonym to acc and acc to synonym

##### Revision d75abe5d - 02/23/2021 06:11 PM - Katja Luther

ref #9340: adapt service methods to secundum workflow

##### Revision b02474e5 - 02/23/2021 06:15 PM - Katja Luther

ref #9340: adapt service methods to secundum workflow - adapt tests

**Revision ae13fa54 - 02/24/2021 08:24 AM - Katja Luther**

ref #9340: adapt service methods to secundum workflow - adapt tests

**Revision 4224661e - 02/24/2021 08:56 AM - Katja Luther**

ref #9340: fix NPE

**Revision daa29c68 - 03/03/2021 12:44 PM - Katja Luther**

ref #9340: add sec check for move synonym to another taxon

**Revision ceda623b - 03/04/2021 04:04 PM - Katja Luther**

ref #9340: change sekundum to secundum

**Revision 78cc32b1 - 03/04/2021 04:09 PM - Katja Luther**

ref #9340: change sekundum to secundum

**Revision 028f99e1 - 03/04/2021 04:18 PM - Katja Luther**

ref #9340: title and message where mixed up

**Revision eaf81585 - 03/04/2021 04:20 PM - Katja Luther**

ref #9340: correct message

**Revision 5f6b535c - 03/04/2021 07:37 PM - Katja Luther**

ref #9340: fix error for keepWhenSame

**Revision 733fcb2d - 03/04/2021 09:25 PM - Katja Luther**

ref #9340: correct handling of sec for moving one more taxa to synonymy of other taxon

**Revision 686ed38c - 03/04/2021 09:28 PM - Katja Luther**

ref #9340: same sec handling for all synonyms of the moved accepted taxon

**Revision ea24e836 - 03/04/2021 10:46 PM - Katja Luther**

ref #9340: fix handling of secundum for synonyms

**Revision f42b6825 - 03/09/2021 09:05 AM - Katja Luther**

ref #9340: fix sec handling for homotypic syn when moving acc to syn of another acc

**Revision 03c890d0 - 03/09/2021 09:47 AM - Katja Luther**

ref #9340: fix sec handling for homotypic syn when moving acc to syn of another acc

**Revision dca5b6f7 - 03/09/2021 11:01 AM - Katja Luther**

ref #9340: fix sec handling for homotypic syn when change synonym to accepted taxon

**Revision e638fe1d - 03/09/2021 11:17 AM - Katja Luther**

ref #9340: fix change syn to accept keep sec for homotypic syn

**Revision 184a2a6b - 03/09/2021 04:39 PM - Katja Luther**

ref #9340: secundum handling if synonym in HG has different sec

**Revision 13172f31 - 03/09/2021 06:31 PM - Katja Luther**

ref #9340: correct handling for sec

**Revision 2427a5bb - 03/09/2021 06:33 PM - Katja Luther**

ref #9340: check for different sec in homotypic group

**Revision 6058f57d - 03/09/2021 07:14 PM - Katja Luther**

ref #9340: check for different sec in homotypic group

**Revision 3f482e4c - 03/10/2021 08:49 AM - Katja Luther**

ref #9340: add comments

**Revision d2c49476 - 03/10/2021 11:11 AM - Katja Luther**

ref #9340: code cleaning

**Revision 9b5e79ee - 08/11/2021 02:48 PM - Katja Luther**

ref #9340, #9734, #9668: further improvements for configurable sec handling during taxon(base) operations

**Revision f13ee832 - 08/11/2021 03:08 PM - Katja Luther**

ref #9340, #9734, #9668: further improvements for configurable sec handling during taxon(base) operations

**Revision 296fa5af - 08/12/2021 11:36 AM - Katja Luther**

ref #9340, #9734, #9668: result should be of type DeleteResult

## History

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**#1 - 12/03/2020 03:36 PM - Andreas Müller**

- Copied from bug #9267: No sec reference for move change Synonym to accepted Taxon added

**#2 - 12/03/2020 06:32 PM - Andreas Müller**

- Description updated

**#3 - 01/27/2021 04:44 PM - Andreas Müller**

- Target version changed from Release 5.19 to Release 5.21

**#4 - 02/23/2021 03:57 PM - Katja Luther**

- Status changed from New to In Progress

the workflow for change synonym to accepted and accepted to synonym is adapted.

**#5 - 02/26/2021 10:19 AM - Katja Luther**

- Assignee changed from Katja Luther to Andreas Müller

please review the already implemented workflows

**#6 - 02/26/2021 11:31 AM - Andreas Müller**

Can you add a list to the description, which other operations are planned to have this workflow support?

**#7 - 02/26/2021 11:32 AM - Andreas Müller**

- Status changed from In Progress to Resolved

- % Done changed from 0 to 20

I put this ticket to resolved so I have it in the review list. Before closing the ticket we should move open issues to a new ticket.

**#8 - 03/01/2021 06:52 PM - Katja Luther**

- Description updated

**#9 - 03/01/2021 06:52 PM - Katja Luther**

- Description updated

**#10 - 03/03/2021 12:26 PM - Katja Luther**

- Description updated

**#11 - 03/04/2021 03:49 PM - Andreas Müller**

- % Done changed from 20 to 30

Tested: Syn => MAN and back

In step 1 sec was deleted (OK)

In step 2 sec was added (taken from accepted) - (OK, though not sure if always expected behavior, but rare usecase)

**#12 - 03/04/2021 03:59 PM - Andreas Müller**

- Status changed from Resolved to Feedback

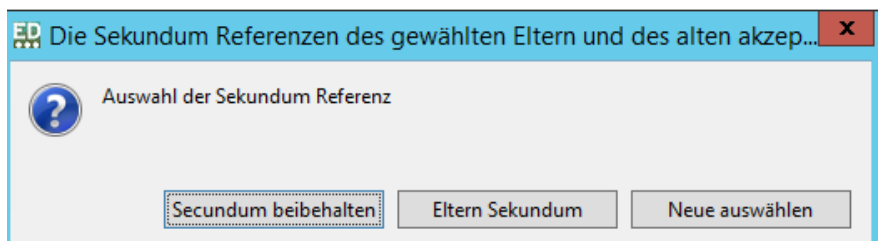
- Assignee changed from Andreas Müller to Katja Luther

Generally use se\*c\*undum not sekundum in German dialogues (and elsewhere) as secundum is Latin. I don't think there is German version Sekundum.

**#13 - 03/04/2021 04:07 PM - Andreas Müller**

- File picture023-1.png added

Tested: Syn => Acc



The dialogue title and the message seem to be mixed up, they should be swapped.

**#14 - 03/04/2021 04:09 PM - Andreas Müller**

Also the message seems to mention the old accepted taxon but I think finally we decided that here the old accepted taxon secundum doesn't matter. We only compare the new parent and the old synonym/new taxon.

**#15 - 03/04/2021 04:52 PM - Andreas Müller**

- Description updated

**#16 - 03/04/2021 06:46 PM - Andreas Müller**

Tested change accepted to synonym (with default preference)

Old parent sec1, oldAcc sec1, newAcc sec1 => warning (FALSE) if all 3 secundum are the same no reason for a warning

Old parent sec1, oldAcc sec2, newAcc sec1 => warning => keep => newAcc sec2 (OK)

Old parent sec1, oldAcc sec2, newAcc sec1 => warning => from acc => newAcc sec1 (OK)

Old parent sec1, oldAcc sec2, newAcc sec1 => warning => select sec3 => newAcc sec3 (OK)

Old parent sec1, oldAcc sec1, newAcc sec2 => warning => keep => newAcc sec1 (OK)

Old parent sec1, oldAcc sec1, newAcc sec2 => warning => from acc => newAcc sec1 (FALSE)

Old parent sec1, oldAcc sec1, newAcc sec2 => warning => select sec3 => newAcc sec3 (OK)

Old parent sec1, oldAcc sec2, newAcc sec2 => warning (FALSE)

There are 3 incorrect handlings

More tests are possible, with null values and with differing old parent

**#17 - 03/04/2021 07:25 PM - Andreas Müller**

Tested change synonym to accepted taxon (with default preference)

OldAcc sec1, oldSyn sec1, newParent sec1 => newAcc null (FALSE!!, this is critical because core functionality)

OldAcc sec1, oldSyn sec2, newParent sec1 => warning => keep => newAcc sec2 (OK)

OldAcc sec1, oldSyn sec2, newParent sec1 => warning => from parent => newAcc sec1 (OK)

OldAcc sec1, oldSyn sec2, newParent sec1 => warning => select sec3 => newAcc sec3 (OK)

OldAcc sec1, oldSyn sec1, newParent sec2 => warning => keep => newAcc sec1 (OK)

OldAcc sec1, oldSyn sec1, newParent sec2 => warning => from parent => newAcc sec2 (OK)

OldAcc sec1, oldSyn sec1, newParent sec2 => warning => select sec3 => newAcc sec3 (OK)

OldAcc sec1, oldSyn sec2, newParent sec2 => newAcc null (FALSE!!)

OldAcc sec1, oldSyn null, newParent sec2 => warning => keep => newAcc null (OK)

OldAcc sec1, oldSyn null, newParent sec2 => warning => from parent => newAcc sec2 (OK)

OldAcc sec1, oldSyn sec2, newParent null => warning => keep => newAcc sec2 (OK)

OldAcc sec1, oldSyn sec2, newParent null => warning => from parent => newAcc null (OK)

OldAcc sec1, oldSyn null, newParent null => no warning, newAcc null (OK)

the deleting of the secundum if oldSyn and new parent secundum are same is the critical issue here

**#18 - 03/04/2021 07:32 PM - Andreas Müller**

Further tested change accepted to synonym (with default preference)

Old parent sec2, oldAcc null, newAcc sec1 => warning => keep => newSyn sec1 (FALSE, should be null)  
Old parent sec2, oldAcc null, newAcc sec1 => warning => from acc => newSyn sec1 (OK)  
Old parent sec2, oldAcc null, newAcc sec1 => warning => select sec3 => newSyn sec3 (OK)

**#19 - 03/04/2021 07:33 PM - Andreas Müller**

Katja, can you please run the same type of tests for

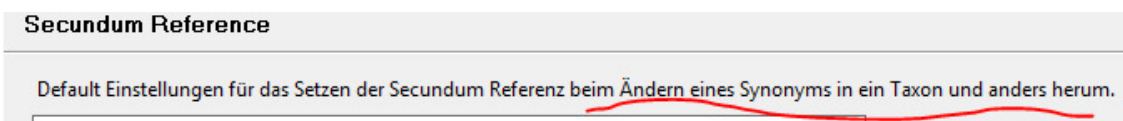
- move synonym to another taxon
- move accepted to new parent

and report the results here?

**#20 - 03/04/2021 07:36 PM - Andreas Müller**

- File picture937-1.png added

The preference says

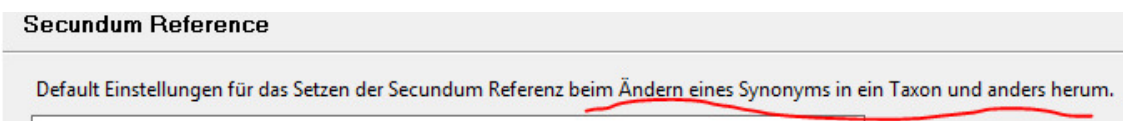


Is it true that it is only for these 2 operations or should we adapt the label?

**#21 - 03/04/2021 07:39 PM - Katja Luther**

Andreas Müller wrote:

The preference says



Is it true that it is only for these 2 operations or should we adapt the label?

actually yes.

**#22 - 03/04/2021 07:46 PM - Andreas Müller**

I test all other preferences (except for default preference) for change "synonym to accepted taxon" and "change taxon to synonym" and they all seem to work as expected

**#23 - 03/04/2021 07:59 PM - Andreas Müller**

Andreas Müller wrote:

I test all other preferences (except for default preference) for change "synonym to accepted taxon" and "change taxon to synonym" and they all seem to work as expected

Ok, from your answer to the previous question I think this makes no sense as it is probably not yet implemented.

Probably we should should split the ticket then as this might be to much work for the upcoming release?

**#24 - 03/04/2021 08:13 PM - Andreas Müller**

I have not checked but I guess that the secundum of other synonyms in the homotypic group is probably not checked yet? Similar to [#8767#note-37](#)

**#25 - 03/04/2021 08:36 PM - Katja Luther**

Andreas Müller wrote:

I have not checked but I guess that the secundum of other synonyms in the homotypic group is probably not checked yet? Similar to [#8767#note-37](#)

There is another question still not handled, should they all get the same sec? If they had different sec references before, or does this not exist?

**#26 - 03/04/2021 08:47 PM - Andreas Müller**

Katja Luther wrote:

Andreas Müller wrote:

I have not checked but I guess that the secundum of other synonyms in the homotypic group is probably not checked yet? Similar to [#8767#note-37](#)

There is another question still not handled, should they all get the same sec? If they had different sec references before, or does this not exist?

I guess this exists as someone later may have added a synonym homotypic to a heterotypic synonym which existed not in the original treatment.

How to handle: depending on the decision I guess the same rule should be used for each synonym. So "keep" will keep ALL secundums, take from new parent will set secundum for ALL synonyms and the same for "select new secundum".

**#27 - 03/05/2021 03:21 PM - Katja Luther**

- Status changed from Feedback to Resolved

- Assignee changed from Katja Luther to Andreas Müller

Andreas Müller wrote:

Katja Luther wrote:

Andreas Müller wrote:

I have not checked but I guess that the secundum of other synonyms in the homotypic group is probably not checked yet? Similar to [#8767#note-37](#)

There is another question still not handled, should they all get the same sec? If they had different sec references before, or does this not exist?

I guess this exists as someone later may have added a synonym homotypic to a heterotypic synonym which existed not in the original treatment.

How to handle: depending on the decision I guess the same rule should be used for each synonym. So "keep" will keep ALL secundums, take from new parent will set secundum for ALL synonyms and the same for "select new secundum".

this is implemented now.

**#28 - 03/05/2021 06:26 PM - Andreas Müller**

- % Done changed from 30 to 50

When testing I sometimes (often at the very beginning after I adapted the test data) got very strange results like publish flag changed the status or no warning appeared though the sec were definitely not the same anymore. This could be related with [#9520](#)

**#29 - 03/05/2021 06:36 PM - Andreas Müller**

- Status changed from Resolved to Feedback

- Assignee changed from Andreas Müller to Katja Luther

If an accepted taxon is converted to a synonym (for an accepted taxon with same sec) its homotypic synonym having the same sec loses the sec !

oldAcc sec1, oldAccHom sec1, newAcc sec1 => no warning, newSyn sec1, newSynHom null (FALSE should be newSynHom sec1)

**#30 - 03/09/2021 10:00 AM - Katja Luther**

Andreas Müller wrote:

If an accepted taxon is converted to a synonym (for an accepted taxon with same sec) its homotypic synonym having the same sec loses the sec !

oldAcc sec1, oldAccHom sec1, newAcc sec1 => no warning, newSyn sec1, newSynHom null (FALSE should be newSynHom sec1)

this is fixed.

also fixed for change synonym to accepted taxon

### #31 - 03/09/2021 06:29 PM - Katja Luther

For default preference "Keep when same"

Synonym to accepted, keep

syn ref1, homotypic syn ref2, parent ref3 -> newTaxon ref1, syn2 ref2, parent ref3 (OK)  
syn ref1, hom. syn null, parent ref1 -> newTaxon ref1, hom. syn null, parent ref1 (OK)  
syn null, homotypic syn ref2, parent ref3 -> newTaxon null, syn2 ref2, parent ref3 (OK)  
syn ref1, homotypic syn ref2, parent null-> newTaxon ref1, syn2 ref2, parent null(OK)  
syn ref1, hom. syn ref2, parent ref1 -> newTaxon ref1, hom. syn ref1, parent ref1 (OK)

Synonym to accepted, use parent sec

syn null, homotypic syn null, parent ref3 -> newTaxon ref3, syn2 ref3, parent ref3 (OK)  
syn ref1, hom. syn ref2, parent null-> newTaxon null, hom. syn null, parent null(OK)  
syn null, homotypic syn null, parent ref3 -> newTaxon ref3, syn2 ref3, parent ref3 (OK)  
syn ref1, hom. syn ref2, parent ref1 -> newTaxon ref1, hom. syn ref1, parent ref1 (OK)

Synonym to accepted, choose sec:

syn null, homotypic syn ref1, parent ref2, choose ref3 -> newTaxon ref3, syn2 ref3, parent ref2 (OK)  
syn ref1, hom. syn ref1, parent null, choose ref3-> newTaxon ref3, hom. syn ref3, parent null(OK)

For Accepted to synonym it is more difficult to check the homotypical group because we only have the taxonnode DTO. Therefore I checked only the old accepted and the new synonym. The decision is used for all moved taxonbases.

Accepted to synonym, keep:

oldAcc sec1, acc sec2: syn sec1, acc sec2 (OK)  
oldAcc sec1, acc sec1: syn sec1, acc sec1 (without warning , OK)  
oldAcc null, acc sec1: syn null, acc sec1 (OK)  
oldAcc sec1, acc null: syn sec1, acc null (OK)

accepted to syn, use parent sec:

oldAcc sec1, acc sec2: syn sec2, acc sec2 (OK)  
oldAcc sec1, acc sec1: syn sec1, acc sec1 (without warning OK)  
oldAcc null, acc sec1: syn sec1, acc sec1 (OK)  
oldAcc sec1, acc null: syn null, acc null (OK)

accepted to syn, choose new sec if secs are different:

oldAcc sec1, acc sec2 choosed sec3: syn sec3, acc sec2 (OK)  
oldAcc sec1, acc sec1: syn sec1, acc sec1 (without warning and without selection OK)  
oldAcc null, acc sec1, choosed sec3:: syn sec3, acc sec1 (OK)  
oldAcc sec1, acc null, choosed sec3:: syn sec3, acc null (OK)

### #32 - 03/10/2021 10:48 AM - Katja Luther

- Related to feature request #9523: Check secundum of homotypic synonyms when changing accepted taxon to synonym added

### #33 - 03/10/2021 12:31 PM - Katja Luther

- Status changed from Feedback to Closed

- % Done changed from 50 to 100

The check of homotypic synonym secs is moved to a new ticket ([#9523](#)), this ticket can be closed.

### #34 - 03/17/2021 06:58 PM - Andreas Müller

- Related to feature request #8922: Make setting of sec-Reference configurable when moving synonyms. added

### #35 - 05/07/2021 12:42 PM - Andreas Müller

- Related to deleted (feature request #8922: Make setting of sec-Reference configurable when moving synonyms. )

**#36 - 05/07/2021 12:43 PM - Andreas Müller**

- Related to feature request #8922: Make setting of sec-Reference configurable when moving synonyms. added

**#37 - 08/05/2021 11:52 AM - Katja Luther**

- Related to bug #9734: Correct handling for secundum references when moving taxon to new parent added

**#38 - 03/01/2023 04:44 PM - Andreas Müller**

- Related to feature request #10255: Add additional option for sec reference handling added

**Files**

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picture023-1.png	7.75 KB	03/04/2021	Andreas Müller
picture937-1.png	3.24 KB	03/04/2021	Andreas Müller