

# HOW TO CHECK YOU TAXA WITH WORMS

**EKlein. March 2019**

This is a review of the procedure you must follow to obtain the **accepted scientific name** and its **corresponding ID (LSID)** of your taxa from WoRMS.

This is the same for the Rocky Shore and Sandy Beach with the difference where the names of the collected/observed organisms are in the standard tables.

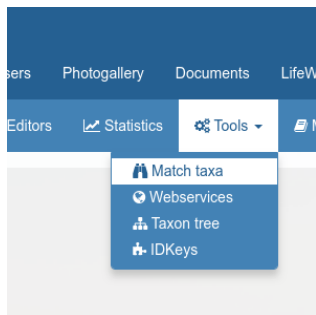
1. In all the cases we have the taxon name in columns, starting at cell W1 in the sandy beach table and in H16 for the Abundance sheet and J16 for the Cover.
2. In the COVER sheet, the cell H16 and I16 contain the names "Bare Rock" and "Without substrate". Do not change that cells even if the last one has a bad orthography. The code take care of that
3. Please be sure that there is no scientific name associated to any organisms. For example you will never find a match for something called "Gusano Peludo Verde" ("Green Hairy Worm"). Identify it to the lowest taxonomic rank possible, like *Polychaeta*. If you don't know the exact scientific name, leave it at the lowest taxonomic rank possible. Names like *Ulva* sp. or *Ulva* spp. are allowed as WoRMS will find a match at the genus level
4. DO NOT include the authority name in the taxon name. This will difficult in most of the cases the match. If there is an ambiguity in the author you will have the opportunity to correct it later.

5. ACTION: Starting with the Abundance sheet, select ALL the taxonomic names from from table and copy then to the clipboard (CTRL-C)

6. ACTION: open a new empty excel sheet. Paste the taxonomic names in a transposed format, i.e. one name PER ROW. To do that do PASTE SPECIAL and select TRANSPOSE in the options. That could vary according to you excel version

7. ACTION: save the new table with the taxonomic names in row as a **\*\*CSV\*\*** file. This is done using the save as.. command. Please name the file **taxonnameAbund.csv**. This will produce a flat text file with the taxon names. If you're tempted to open the file with the infamous Notepad, please DO NOT save it again, just close it without saving. Although you can use Notepad to view the content of the file, just be careful to not save it again, Notepad will introduce some alien codes in the file.

8. Go to [WoRMS](#) site, and look for "Match taxa" in the "Tools" menu and click it:



**WoRMS Taxon match**

You can use the WoRMS Taxon Match Tool ([credits](#)) to automatically match your species list or taxon list with WoRMS. After matching, the tool will return your file with the AphiaID. For performance reasons, the limit is set to 1,500 rows. For matching larger files, non-marine or multiple datasources, please use the [Lifewatch Taxonomic Backbone](#).

File  No file chosen

Allowed filetypes: Plain text [TXT], Comma Separated [CSV] & Excel sheet [XLS, XLSX]

Row delimiter   First row contains column names

Column delimiter

Match authority

Match upto  Higher taxa only possible if a full classification is given in additional columns

Limit to

Limit to taxa belonging to

Output  AphiaID  LSID  TSN  ScientificName  Authority  Accepted name  Classification  Qualitystatus  Taxon status  Environment  Citation

9. ACTION: click on “Choose File”, and select your **taxonnameAbund.csv** from your computer.

10. NOTE: **make sure that the option LSID is checked** at the bottom before click Next. Click Next then.

**WoRMS Taxon match**

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File  taxonnameAbund.csv

Allowed filetypes: Plain text [TXT], Comma Separated [CSV] & Excel sheet [XLS, XLSX]

Row delimiter   First row contains column names

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Match authority

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Output  AphiaID  LSID  TSN  ScientificName  Authority  Accepted name  Classification  Qualitystatus  Taxon status  Environment  Citation

11. You will have a preview of the content of your **taxonnameAbund.csv** file saying that the column represent the scientific name of the organism. If you're satisfied with that, click "Match". You will have something similar to this:

**WoRMS**  
World Register of Marine Species

Quick search...

### WoRMS Taxon match

Preview for the file 'taxonnameabund.csv' (first 20 records) [\[new match\]](#)  
Please select a WoRMS term that corresponds to your column and click 'Match'.

ScientificName ▼  
"Mytilus edulis platensis (diOrbigny, 1842)"  
Siphonaria lessoni  
Aulacomya atra atra  
Tegula patagonica  
Trophon geversianus  
Plaxiphora aurata aurata  
Cyrtograpsus altimanus  
Exosphaeroma sp.  
Epitonium fabrizioi  
Diadumene sp.  
Fissurella radiosa tixierae  
Eulalia clavigera

[\[options\]](#) [\[preview\]](#)

< Back Match

12. You will probably have some mismatched that could be caused by an ambiguity in the authority. You have to resolve each of them using the pull down menu in each of the taxon with problems.

## WoRMS Taxon match

Match preview for the file 'spplist.csv' - matching: 100% [[new match](#)]

If available, please select the [WoRMS](#) taxon that corresponds to your taxon. Then click 'Download'.

Chiton stokesii	Chiton stokesii Broderip, 1832
Ischnochiton dispar	Ischnochiton dispar (Sowerby in Broderip & Sowerby, 1832)
Axiidae sp.	Axiidae Huxley, 1879
Calcinus obscurus	Calcinus obscurus Stimpson, 1859
Eriphia squamata	Eriphia squamata Stimpson, 1860
Mithraculus denticulatus	Mithraculus denticulatus (Bell, 1836)
Uca sp. 1	<input type="text" value="Uca Leach, 1814 [exact]"/>
Uca sp. 2	<input type="text" value="Uca Leach, 1814 [exact]"/>
Chthamalus panamensis	Chthamalus panamensis Pilsbry, 1916
Tetraclita squamosa panamensis	Tetraclita squamosa panamensis Pilsbry, 1916
Holothuria (Selenkothuria) portovallartensis	Holothuria (Selenkothuria) portovallartensis Caso, 1954
Holothuria sp.	<input type="text" value="Holothuria Linnaeus, 1767 [exact]"/> (ambiguous - select below) <input type="text" value="Holothuria Linnaeus, 1767 [exact]"/> <input type="text" value="Holothuria Linnaeus, 1758 accepted as Physalia Lamarck, 1801 [exact]"/>
Ophiactis savignyi	
Ophiocoma aethiops	
Ophiocomella alexandri	
Ophionereis annulata	

Excel sheet (XLS)  Excel sheet (XLSX)  Text file  SGML

13. You could also have non-matched taxa that appear in **red** in the WoRM match window. In this case you have provide the correct name in the **original excel table and repeat the match again.**

14. If you're absolutely certain that your species name is correct but it is not in WoRMS, you can write to WoRM providing the reference of that particular taxon and they will incorporate the name in a very short time (max 1-2 days, normally after few hours).

15. Once you've resolved all your ambiguous matches and mismatches, you click on **Download** and **save you file as text file**. WoRMS will save a txt file with the matching information for each of your taxa.

## WoRMS Taxon match

Match preview for the file 'spllist.csv' - matching: 100% [[new match](#)]

If available, please select the [WoRMS](#) taxon that corresponds to your taxon. Then click 'Download'.

Chiton stokesii	Chiton stokesii Broderip, 1832
Ischnochiton dispar	Ischnochiton dispar (Sowerby in Broderip & Sowerby, 1832)
Axiidae sp.	Axiidae Huxley, 1879
Calcinus obscurus	Calcinus obscurus Stimpson, 1859
Eriphia squamata	Eriphia squamata Stimpson, 1860
Mithraculus denticulatus	Mithraculus denticulatus (Bell, 1836)
Uca sp. 1	<input type="text" value="Uca Leach, 1814 [exact]"/>
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Holothuria (Selenkothuria) portovallartensis	Holothuria (Selenkothuria) portovallartensis Caso, 1954
Holothuria sp.	<input type="text" value="Holothuria Linnaeus, 1767 [exact]"/>
Ophiactis savignyi	Ophiactis savignyi (Müller & Troschel, 1842)
Ophiocoma aethiops	Ophiocoma aethiops Lütken, 1859
Ophiocomella alexandri	Ophiocomella alexandri (Lyman, 1860)
Ophionereis annulata	Ophionereis annulata (Le Conte, 1851)

Excel sheet (XLS)  Excel sheet (XLSX)  Text file  SGML

If you follow all the steps, you will have a new file, **taxonnameAbund\_matched.txt** which is needed for the processing of your original tables and the dashboard.