BarnebyLives: an R package to create herbarium specimen labels and clean spreadsheets

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Abstract

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Premise: Depositing specimens in herbaria is a time-consuming process. Many institutions have reduced the amount of funding for herbaria and universities have reduced the amount of education dedicated to collections and curatorial tasks. However, the continual generation of herbarium specimens is essential for current and future research on ecology, evolution, and conservation. To facilitate the continued growth of herbaria, BarnebyLives was developed as a tool to supplement collection notes, perform geographic and taxonomic information processing, enact spell checks and other QC steps, produce labels, and submit digital data to increase the ease of accessioning specimens.

Methods and Results: BarnebyLives uses geospatial data from the U.S. The Census Bureau for administrative jurisdictional data, and other sources, including the United States Geological Survey, to supplement collection notes by providing information on abiotic site conditions and locality information. It uses in-house spell checks to verify the spelling of a collection at all taxonomic ranks, the IPNI standard author database to check standard author abbreviations, and the Royal Botanic Garden Kews 'Plants of the World Online' to check for nomenclature innovations. Optionally, the package writes driving directions to the sites using Google Maps. The package outputs data in tabular and spatial formats for review by the user before rendering labels using LaTeX.

Conclusions: BarnebyLives provides accurate political and physical information, reduces typos, provides users with current taxonomic opinions, generates driving directions to sites, and produces aesthetically pleasing labels and shipping manifests in a matter of minutes.

- Nearly 400 million specimens are housed worldwide in herbaria (Thiers, 2021). However, The rate of acces-
- sioning new collections to herbaria diminished in the 20th century as priorities in biology shifted away from

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describing and documenting earths biodiversity and towards understanding cellular and molecular processes underpinning life (Prather et al., 2004; Pyke and Ehrlich, 2010; Daru et al., 2018). This shift, among other factors, led to a decline in the funding allocated to collection-based research, the number of staff maintaining and accessing new collections, and educating students in these practices (Funk, 2014). Historically, specimens have been used to describe the taxonomic diversity of plants and document global floristic diversity (Greve et al., 2016; James et al., 2018; Brewer et al., 2019; Rønsted et al., 2020). However, renewed interest in herbarium collections utilizing 'big data approaches,' such as museuomics, has brought herbaria back to the forefront of the natural sciences (Rønsted et al., 2020; Marsico et al., 2020).

Innovations in specimen digitization, data sharing, computing, DNA sequencing, and statistics have perhaps brought about greater use of herbarium specimens than ever before (Greve et al., 2016; James et al., 2018; Brewer et al., 2019; Rønsted et al., 2020). The current use of specimens and their ancillary data extends well beyond their traditional roles in systematics and floristics, and studies utilizing collections are regularly carried out to better understand the ecological niches, phenological processes, and interactions of plants (Rønsted et al., 2020; Davis, 2023). We suspect that collections are yet to realize their full potential, and as currently novel approaches, such as remote and electronic sensing and meta-barcoding, become more accessible the use of collections will increase (Tosa et al., 2021). While image-based or purely observational (rather than collection-based) citizen science approaches (e.g., iNaturalist, BudBurst) have recently dovetailed with herbarium specimens to meet many current research needs, specimens contain rich data that are not accessible via images. Only specimens have the ability to: provide samples of DNA, secondary metabolites, or proteins, material for measuring (micro-)morphological attributes (Borges et al., 2020), and seeds or pollen. These factors ensure that the specimens remain the premier botanical data source into perpetuity.

However, despite renewed recognition of the utility of collections, efforts to grow them appear slow (Prather et al., 2004). We conjecture that this is partly because collecting and depositing specimens is a fundamentally slower process, especially for novice collectors, relative to taking photographs via professionally developed apps on smartphones (Daru et al., 2018; Mishler et al., 2020; Manzano and Julier, 2021). While many young botanists are capable of using dichotomous keys and other resources to reliably identify and collect satisfactory material, we observe that they face difficulties navigating several aspects of data acquisition, processing, and preparation of labels for submission to herbaria. Evidently apparent problems include the lack of dedicated time at the end of a field season to process specimens, a general lack of education on cartography and orienteering, natural history (e.g., geology, geomorphology), nomenclature, and familiarity with various computer programs (for example, Microsoft Office suite), and increasing foundational knowledge of plant systematics and phylogenetics (Woodland, 2007; Barrows et al., 2016; Nanglu et al., 2023).

The generation of an herbarium specimen involves many steps that are easy to take for granted (Forman and Bridson, 1989). For example, while acquiring appropriate political information for a collection site appears simple, young collectors rarely have adequate cartographic resources (printed topographic maps or GIS software) at their disposal. In topographically complex areas, where administrative borders are often associated with hydrological basins and the ridges defining them, collectors are liable to misinterpret their true geographic position and report details in error. Even finding appropriate site names can rarely be solved without a printed map, as many navigation-related software now consider many features that would serve as site names extraneous. Similarly, the rate at which taxonomic innovations occur, the volume of the literature, and the reluctance of some regional curators to embrace a phylogenetic approach to plant classification have made it difficult to find more recently applied names, even when these names are unanimously accepted by taxonomic specialists in the group and other regional curators (Hitchcock and Cronquist, 2018). Furthermore, formatting a label correctly (e.g., author abbreviations, italicization, etc.) is a time-consuming process with many opportunities to introduce errors in formatting. Anecdotally, many mail merge templates offered by herbaria still require collectors to modify many variables by hand, for example, applying italicization. Even if a collector navigates all these hurdles, the time allocated to each step is quite large. As a result of these concerns, we have developed an R package, BarnebyLives, that aims to increase both the quality of data rendered to labels and recorded in databases and to speed up the generation of labels. BarnebyLives rapidly provides political and administrative boundary information for a collection site using data from the U.S. Census Bureau (Walker, 2024), the Public Land Survey System (PLSS), and ownership details of public lands via the Protected-Areas Database (PAD-US) (Gap Analysis Project (GAP), 2024). Site names are suggested by finding the closest unambiguously named place feature in the Geographic Name Information System (GNIS) and the precise calculation of distance and azimuth from this feature to the collection site (Survey, 2023). Using the Global Mountain Biodiversity Assessment (GMBA) Mountain Inventory V. 2, a standardized named mountain data set with global coverage allows for a relevant descriptor of the general region with less ambiguity (Snethlage et al., 2022). Spell checks on all scientific names (including associated species) are performed using a copy of the World Checklist of Vascular Plants, and the resolved species may be searched via Kew's Plant of the World Online for relevant synonyms (Govaerts et al., 2021; POWO, 2024). Author abbreviations are verified using the International Plant Names Index 84 (IPNI) Standard Author Abbreviation Checklist and also returned by Kew's Plants of the World Online to ensure proper abbreviations of authorities (The Royal Botanic Gardens and Herbarium, 2024; POWO, 2024). Checks to search for and flag common issues associated with spreadsheet software or data transcription, such as the auto-filling of coordinate and date columns. After a final review of the data, flagged or generated by the package, it allows for the option to export spreadsheets that are suitable for mass uploading of data to multiple common herbarium databases as well as the generation of herbarium labels.

Currently, to our knowledge label generation functionality is provided explicitly by two programs, PLabel and Symbiota, and by the Microsoft Word tool Mail Merge (Gries et al., 2014; Perkins, 2020). The office suite costs money, and in our experience, is finicky; further, its functionality ends with label creation. PLabel is a standalone program that has greatly enhanced functionality relative to a mail merge, allowing users to specify the layout and formatting of label components using an intuitive and local graphical user interface (GUI) functionality. However, beyond verifying the nations of collection it does not include data cleaning functionalities. While some sources indicate that it can only be used on Microsoft, we expect it to be usable on Linux and Mac using Windows 'emulators' like Wine. The increasingly popular Symbiota biodiversity data management software not only provides label generation capabilities but also provides data cleaning functionality 100 in an attractive GUI web portal allowing for live management of collections and bypassing the need for a 101 local installation, allowing it to be accessed on all operating systems. Symbiota offers functionality similar to the first four of our five stages of our 'Taxonomic' module and to our knowledge a check of the 'Political 103 Boundaries' (see Figure 1). However, not all herbaria use Symbiota and many have original database systems that they maintain (for example, Harvard University Herbarium, https://kiki.huh.harvard.edu/databases/ 105 specimen_index.html; Missouri Botanical Garden https://tropicos.org/specimen/Search; and The Consortium of Pacific Northwest Herbaria https://www.pnwherbaria.org/). However, and most importantly many 107 collectors prefer to generate their own labels, especially as they are likely to send different sets of collections to different institutions. Accordingly, the functionality of Symbiota should exist in an ecosystem with alternative systems. In scenarios where users want to keep rendering labels in either of the three existing 110 alternatives, they can easily export data in the appropriate formats after utilizing BLs data cleaning utilities. 111 BarnebyLives was named for plant taxonomist Rupert Charles Barneby (1911-2000), who published over 112 6,500 pages of text, described over 750 taxa, and is notable for balancing his studies at the William and Lynda Steere Herbarium at the New York Botanical Garden with annual collection trips in Western North 114 America from 1937-1970 and sporadically until he passed in 2000 (Welsh, 2001). Select accolades of Rupert 115 include the 1989 Asa Gray Award from the American Society of Plant Taxonomists (ASPT), the 1991 Engler 116 Silver Medal from the International Association of Plant Taxonomists (IAPT), as well as being one of eight 117 recipients of the International Botanical Congress's (IBC) Millennium Botany Award (1999) (Welsh, 2001). Most germanely, Rupert was remembered as being generous with his time to assist younger botanists with 119

the more arcane aspects of field botany and taxonomy (Holmgren and Holmgren, 1988).

$_{\scriptscriptstyle m H}$ METHODS AND RESULTS

[Figure 1 about here.]

BarnebyLives was iteratively developed based on data submitted by approximately 20 seasonal field botany teams over two years. Essentially, continual updates were made as the developers became aware of the idiosyncrasies of collection notes and data entry. Several commands in BarnebyLives require output from previous functions, and a workflow that satisfies these requirements is presented in Figure 1.

127 Usage

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All steps of BarnebyLives, except for label generation are run within the freely available RStudio. Data 128 may be read from any common spreadsheet management system or database connection such as Excel, or 129 free alternatives such as LibreOffice, OpenOffice, or via the cloud on Google Sheets. The latter two options are documented here and in package vignettes, detailed descriptions of the required and suggested input 131 columns are located on a Github Pages (https://sagesteppe.github.io/BarnebyLives/) and around 100 realworld examples are on a Google Sheets accessible from the page. BarnebyLives is atypical for R packages in 133 that it requires a considerable amount of data to operate (Table 1). Virtually all on-disk memory associated with the package are used to store spatial data. The amount of spatial data varies according to the domain 135 that the user decides to support (Figure 3). Functions that require on-disk data require a path to data as an argument. Manually supplying the path argument allows users to determine an appropriate storage location 137 suitable for their needs. 138

We anticipate that for a typical user, BarnebyLives will require less than a couple gigabytes of memory 139 (ours covering all of the conterminous Western U.S. at 3-arc second (~90m) resolution is ~16 GiB), while the 140 processing requires relatively little RAM; hence, we believe installations can work on hardware as limited as 141 Chromebooks, while having the data stored entirely on thumb-drives. Given that the attributes which the 142 package collects data on are tailored to the Western U.S. region, we do not expect local installs to exceed 143 the size of ours. The final steps of BarnebyLives, generating the labels, requires working installations of R Markdown, a LaTeX installation (e.g. pdfTeX, LuaTeX, XeLaTeX), and the open source command line 145 tools pdfjam and pdftk. While these steps are run through a shell scripting language such as bash, we have wrapped them in R functions that bypass the need to enter the commands directly into a shell terminal 147 outside of RStudio. Unfortunately, we have not found Windows alternatives to pdfam and pdftek, so we are unable to offer the final label-generating functionality on that operating system, but suspect Ubuntu subsystem for Windows may allow for integration of these tools.

Functionality

- 152 BarnebyLives can be thought of as consisting of five main modules (Figure 1): spatial, taxonomic, formatting,
- manual review, and data exporting.
- The spatial module has five required functions and two optional functions.
- 155 autofill_checker searches for patterns in the input latitude and longitude data associated with autofilling
- 156 from various spreadsheet programs and will emit a warning if they are encountered.
- coords2sf creates a spatially explicit simple feature (sf) geometry dataset for the input data. political_grabber
- determines many levels of administrative ownership, including land management and public land survey
- 159 system sections.
- physical_grabber provides various geographic data, such as elevation, landform position, and aspect using
- 90m resolution spatial data.
- 162 site writer write distance and azimuth to collection site from the nearest official named place from the
- GNIS database. directions_grabber is an optional function that writes driving directions from a reasonably
- 164 sized town to the closest drivable area to the site using the Google Maps API, which will require a valid
- Google account that is free per month for most personal and smaller academic usages. dms2dd is an optional
- function used to convert from coordinates denoted in the degrees minutes and second format (for example,
- ¹⁶⁷ 42°08'39.9"N 87°47'08.3"W) to decimal degree format (for example 42.14439, -87.78569).
- Please note that the function physical_grabber is the one portion of the package where a decoupling may
- exist between the collection site, and the resolution of the spatial data. While we expect the mismatch
- to be negligible for all effective purposes relating to: elevation, major geology type, and in general aspect,
- estimates of slope at this resolution may be biased generally to lower angles. For these reasons collectors
- must always make notes on the truly local environment which taxa are found in, and consider that the notes
- from BL reflect the greater landscape which a microfeature may be present in. While this mis-match will
- 174 seldom effect landscape ecologists, it may have implications for other data users.
- The taxonomic module has four required functions and one optional function.
- 176 spell check will perform a spell check on the entered scientific name based on a local copy of Kew Plants of
- the World database filtered to the local continents or a user-specified backbone.
- 178 spell check family performs a spell check on the family entered for each scientific name.
- 179 author_check ensures that the authors are entered in a valid format, for example, the correct standard

abbreviations are used.

associates_check performs a spell check on all associated species using the local taxonomic database.

powo_searcher can be used in tandem with the functions spell_check_family and author_check, but we use

it in lieu of them to search the current Plants of the World Online to determine relevant synonyms and alter-

native higher taxonomy for the focal species. No API key or registration is required to use powo_searcher.

185 The formatting module has three functions. Two are optional; however, they are run locally and so quickly

that there is no reason to skip them. date_parser parses an input date into various formats for notating

collection and determination dates on labels. associate dropper silently removes the collected species from

the list of associated species; however, it searches for the species to be removed using the scientific name

entered initially by the user rather than returned via spell checks. field lengths will emit messages for any

fields that we suspect will create an 'overflow' on the physical label and should be truncated for clarity.

The manual review process technically only has one function that is optional and may be executed during

the spatial process (after coords2sf), but the importance of manual review is important enough to warrant

193 explicit mention.

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geodata_writer will write out a spatial copy of the data set to any geospatial format supported by the sf

package, but defaults to writing out 'kmls' which are readily used with Google Earth, and can also be opened

in several other free geographic information system (GIS) softwares such as QGIS. Notably, many of the flags

that BarnebyLives generates will be placed into columns with obviously flagged names and can be manually

reviewed by the analyst, and many of these issues can be resolved by simply addressing the relevant issues

in the original data input spreadsheet.

200 The data exporting module contains three functions that interact with LaTeX templates and require slightly

201 more advanced R user interactivity, such as setting up mapping functions using the tidyverses purrr package.

202 labels skeleton is an R 'script' which will require a few modification steps to tailor to each institution, these

203 R scripts will put data into a user specified template, and serve as the interface to LaTeX.

label writer write from a flatfile or spreadsheet to small 4x4 inch herbarium labels (users can modify these

dimensions as they see fit). format_database_import will write out a spreadsheet of cleaned data in a variety

of formats, currently: Jepson, Symbiota, and Consortium of Pacific Northwest herbaria are supported.

Herbarium Collections

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[Figure 2 about here.]

The testing of the package within this manuscript was performed using a subset of the authors collections

from 2018-2022, while most development was performed on their 2023 and 2024 collections. Only collections
which had identifications to the level of species or lower, and transcribed collection dates and coordinates
were used for most functionality. In total 981 records were used for testing various functions, these records
were from 234 sites located across Western North America (Figure 2). In total this data set had 729 species
(with 558 distinct sets of authors), with 83 infraspecies (22 authorships) in 74 families.

BarnebyLives took roughly four minutes (222.886sec) to run all local steps, and roughly ten minutes (584.05sec) to search Plants of the World Online for preferred synonyms, and a minute 63.945sec to search Google Maps and write directions to sites.

Most of the local run time is attributable to the spatial (205.254sec), and taxonomic operations (17.253sec), while formatting data for labels took 0.379sec. The spell check of the scientific name accounted for nearly all of the time (17.006sec) spent performing local taxonomic operations. The generation of labels consumed around eight minutes (509.931sec) for the rendering, and an additional 58.60sec to combine the 182 sheets to a single Portable Document Format (PDF). The total label generation run time for processing these 729 collections was 15 minutes. In total the 729 collections, which underwent all processing steps, took 24 minutes to process.

25 RESULTS

Even on data which had been manually cleaned and error-checked by a human several times BarnebyLives
was able to reduce transcription errors, identify typos, make nomenclature suggestions, and reformat text elements for downstream use. While none of the 74 families were misspelled, BarnebyLives made 25 suggestions
on naming, identified 6 instances where the user entered an unequivocally incorrect family (or taxonomic
entity), identified 5 records where families were autofilled, and 1 instance where an outdated circumscription
was applied. At the level of family BarnebyLives flagged 6 records where the author follows an alternative
taxonomy, and flagged 7 records in error, it appears most of these errors are due to issues in the backbone
used by the earlier spell check function.

In the 326 genera analysed BarnebyLives identified 75 discrepancies at the level of genus between user submitted and processed data. In 42 of these instances the user supplied an outdated name (21 unique genera) flagged 4 records where the author follows an alternative taxonomy (2 genera total), and flagged 2 record in error.

Of 729 distinct species analysed BarnebyLives flagged 61 records, and detected 33 instances of misspelled epithets (33 unique species). In 15 of these instances the user supplied an outdated name (15 unique species).

It also flagged 2 records where the author follows an alternative taxonomy (2 unique species), and flagged 8 records in error. The final record was an egregious error where the order of the specific epithet and the genus name.

²⁴³ 5 records were appropriately flagged for issues with auto fill increment of the longitude value, and 3 records
²⁴⁴ were also auto-flagged for increases in latitude values.

[Figure 3 about here.]

$\mathbf{DISCUSSION}$

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While numerous tools have been developed for cleaning existing herbarium and museum records, few tools
help to ensure that the data entered are accurate (Patten et al., 2024). We argue that the original collectors
are the most qualified individuals to perform quality control checks and that BarnebyLives allows them to
assume that responsibility in a relatively fast and streamlined format. By utilizing both R and LaTeX and
having publicly available source code on Github, this program allows users immediate familiarity with the
system for troubleshooting issues and implementing upgrades and modifications in project branches.

LaTeX, a software system used for typesetting, allows users to focus on the content rather than the style of
the documents rendered from it. However, using its default settings, it can produce aesthetically pleasing
results (Figure 4). Additionally LaTeX offers users a wide variety of ways which they can modify labels which
are under-explored in the package. Very good documentation of LaTeX capabilities is offered in multiple
areas; for instance, via the Overleaf project. While the templates in the package are quite simple, LaTeX
also offers the ability to use custom fonts, to alter font weights and colors, alter line spacing, to include
images (e.g. dot maps) and customize labels beyond what the default templates support.

Thematically, BarnebyLives is set up to cover Western North America. However, the package supports the use of a 'domain' being drawn over any of the conterminous United States. Several of the attributes which it collects and displays on labels, relate to topics which more senior curators are interested in, i.e. the administrative information on Township Section and Range (or 'TRS'), but are considered less value in other geographic regions.

Further several of the abiotic variables which it acquires information on: slope, aspect, and geology have long been considered prominent drivers of plant distributions in semi-arid and montane systems and warranted on a label in these types of systems, whereas curators in other regions may find this information superfluous. Finally, it is plausible people in other geographic areas are less interested in displaying which land management agency has jurisdiction over a collection; however in the west we believe this is useful information which may help a collector interested in revisiting a site to determine if they will require permits for access or to make new collections.

Accessioning often relies on the use of the Microsoft Office suite of programs and may utilize other costly software such as ArcPro or Adobe Acrobat. While BarnebyLives does not have its own graphic user interface, the functionality of commonly used Interactive Development Environments (IDE's), such as Rstudio and VisualStudio (VS) Code, now offer functionality to readily view and filter datasets using familiar spreadsheet-like formats, making them more accessible to many users. While other software often cost money, these are also free, and we recommend that users install an open-source PDF viewer such as Okular to review their rendered documents.

[Figure 4 about here.]

80 CONCLUSIONS

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BarnebyLives is an R package that can be used to rapidly acquire relevant geographic and taxonomic data.

It can also perform specialized spell checks and assorted curatorial tasks to produce both digital and analog
data. The package relies on no licensed software, such as the Microsoft Office suite, and is suitable for install
on all major operating systems (Windows, Mac, Linux), however currently label generation support is only
offered on Linux and Mac, with a small amount of use of the command line, which may be called from the
Rstudio rather than a 'traditional' terminal.

AUTHOR CONTRIBUTIONS

The project was conceptualized by R.C.B. The program was written by R.C.B. Data collection and analysis were performed by R.C.B. R.C.B. & J.B.F wrote the manuscript, and both authors approved the final version of the manuscript.

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296 DATA AVAILABILITY STATEMENT

The BarnebyLives R package is open source, the development version is available on GitHub (https://github. 297 com/sagesteppe/BarnebyLives). The package includes three real use-case vignettes (tutorials) available on a Github Pages site (https://sagesteppe.github.io/BarnebyLives/). The first vignette "Preparing to use 299 BarnebyLives!" shows how to set up an instance for a certain geographic area (domain). The next two vignettes "BarnebyLives! Running pipeline" showcases the usage of the package for processing data entered 301 on a spreadsheet, and "Printing herbarium labels and exporting a digital copy of data" how to export data 302 in both digital and analog formats. "Custom label templates" shows how to customize labels in LaTeX, 303 and "Rendering a shipping manifest" details how to produce a shipping manifest for gifting or transferring 304 material to an herbarium. All data used in this manuscript are available at: https://github.com/sagesteppe/ Barneby Lives dev/manuscript. 306

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371 SUPPORTING INFORMATION

- Additional supporting information can be found online in the Supporting Information section at the end of this article.
- 374 Appendix S1. A table of all time trials for each function.

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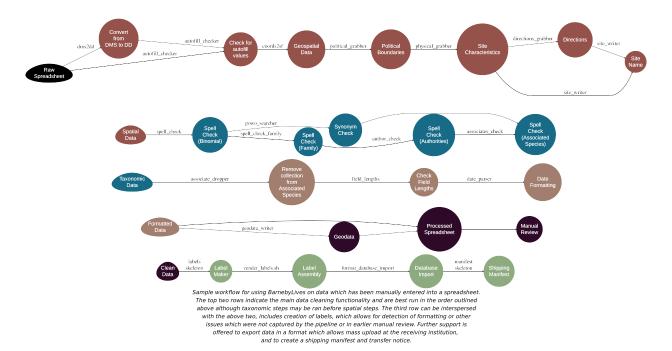


Figure 1: Recommended workflow

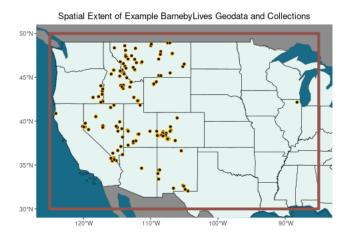


Figure 2: The spatial extent-or domain- (orange), and herbarium collection sites (burgundy) tested in this manuscript.

Variable	Usage	Source	Name	Data Model	Size (GiB)
County	Political	US Census Bureau	Counties	Vector	0.073
State			States		0.0*
Ownership		US Geological Survey	Protected Areas Database		0.43
TRS			Public Land Survey System		0.81
Place Names	Site Name		Geographic Names Information System		0.08
Mountains	Site Name	EarthEnv	GMBA Mountain Inventory v2		0.00
Elevation	Site Characteristics	Open Topography	Geomorpho90m - Elevation	Raster	4.2
Slope			Geomorpho90 - Slope		4.6
Aspect			Geomorpho90m - Aspect		4.1
Geomorphons			Geomorpho90m - Geomorphons		0.45
Surficial Geology		US Geological Survey	State Geologic Map Compilation	Vector	0.70
Taxonomic Spellings	Spell Checks	World Flora Online	World Flora Online	Text	0.00
Author Abbreviations		IPNI	International Plant Names Index		0.00

Figure 3: Data Sources

Assess, Inventory, and Monitor

ASTERACEAE

Tetraneuris ivesiana Greene

U.S.A., Colorado, Montrose Co., Uncompa
hgre Plateau, BLM Uncompahgre FO 48N 11W 35. 0.4mi at 138° from Cottonwood cr
k. 38.36884 -108.05796 (NAD83 +/- 5m).

Sandstone soils above cliff face. At 7,930 ft (2,417 m), on a slope, 15° slo. 257° asp.; geology: Sedimentary, clastic.

Veg.: Amelanchier alnifolia var. utahensis, Quercus gambelii, Cercocarpus montanus, Symphoricarpos rotundifolius, Artemisia tridentata var. wyomingensis, Petradoria pumila, Gutierrezia sarothrae, Bouteloua gracilis. Ass.: Petradoria pumila, Eremogone congesta, Heterotheca villosa.

Reed Clark Benkendorf 2759, Hannah Lovell; 28 Jul, 2022. Fide: Flora of Colorado, det.: R.C. Benkendorf, 31 Dec, 2022.

Figure 4: A label generated from a default template