

SANBI POLICY DOCUMENT

DIVISION: Biosystematics Research and Biodiversity Collections	POLICY NUMBER: D4
EFFECTIVE DATE: 1 June 2014	LAST AMENDED: 5 May 2014

INCORPORATING NEW ACCESSIONS INTO HERBARIUM COLLECTIONS

- Background** The South African National Biodiversity Institute (SANBI) is mandated to manage, control and maintain herbarium collections and to make these collections available to the end user.
- This document should be read in conjunction with:
VICTOR, J., KOEKEMOER, M., FISH, L., SMITHIES, S. & MÖSSMER, M. 2004. *Herbarium Essentials: the southern African herbarium user manual*. [SABONET Report No. 25](#). SABONET, Pretoria.
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- Scope** This policy deals with the incorporation of new accessions into the SANBI herbarium collections.
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- Policy**
- Herbarium staff to sort, file and maintain collections according to accepted, sequential taxonomic arrangement followed by SANBI's herbaria, when adding new specimens to the collections.
 - All the processes detailed in ADDENDUM 1 must be adhered to.
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- Process** A summary of the procedures is provided in ADDENDUM 1 under the following headings:
1. Dealing with type material
 2. Sorting general specimens sequentially
 3. Filing specimens into species folders
- Also refer to Victor *et al.* (2004: 41) for 'Guidelines for handling specimens'
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ADDENDUM 1

1. Dealing with type material

- 1.1. Specimens identified as types are placed in clearly marked type covers (refer to Victor *et al.* 2004: 40, 68 for further information on and definitions of type specimens). Fragments or photographs of types are also filed in type covers, but a clear indication should be made on the cover that these are fragments or photographs.
- 1.2. The full name of the taxon, its correct author citation, the place of publication and the collector's name and number should be written with archival ink on the type cover. A type cover is a strong folder, folded in a specific way to ensure the protection of the type specimen. Type folders are made of acid-free paper. The type cover is usually marked with a conspicuous, red-coloured band along the bottom edge.
- 1.3. Ensure that the type specimen has been scanned, accessioned and the image stored electronically to facilitate easy retrieval. Refer to Policy E7.
- 1.4. The specimens are sorted sequentially as described under 2.2.
- 1.5. The specimens are filed into the collections. At the National Herbarium (PRE) and the KwaZulu-Natal Herbarium (NH), the type specimens are filed alphabetically at the beginning of each genus to reduce unnecessary handling, while in the Compton Herbarium (NBG) type specimens are filed at the beginning of the species folder.

2. Sorting general specimens sequentially

- 2.1. Sorted specimens awaiting filing are stored in an appropriate cupboard.
- 2.2. Specimens of vascular plants are arranged by family and genus following the Angiosperm Phylogeny Group II (APG II 2003) classification, including subfamilies. A modified list with numbers is available. In the past, genera were arranged sequentially using the modified systematic arrangement of Dalla Torre & Harms (1900–1907). Refer to Victor *et al.* (2004: 43). The numbers for genera can be obtained from: GERMISHUIZEN, G. & MEYER, N.L. 2003. Plants of southern Africa: an annotated checklist, *Strelitzia* 14. SANBI, Pretoria.

Lycopodiophyta (lycopods) and Pteridophyta (ferns) are arranged according to these references:

CHRISTENHUSZ, J.M., ZHANG, X-C & SCHNEIDER, H. 2011. A linear sequence of extant families and genera of lycophytes and ferns. *Phytotaxa* 19: 7–54.

CHRISTENHUSZ, J.M. & SCHNEIDER, H. 2011. Corrections to *Phytotaxa* 19: Linear sequence of lycophytes and ferns. *Phytotaxa* 28: 50–52.

In the past, the classification of Tryon & Lugardon (1990) was used:

TRYON, A.F. & LUGARDON, B.L. 1990. *Spores of the Pteridophyta*. Springer-Verlag, New York.

Bryophytes follow a modified system of Magill & Schelpe (1979):

MAGILL, R.E. & SCHELPE, E.A. 1979. The Bryophytes of southern Africa: an annotated checklist. *Memoirs of the Botanical Survey of South Africa* No 43. Botanical Research Institute, Pretoria.

Lichens are arranged alphabetically, starting with families.

Gymnosperms follow Christenhusz *et al.* (2011):

CHRISTENHUSZ, M.J.M., REVEAL, J.L., FARJON, A., GARDNER, M.F., MILL, R.R. & CHASE, M.W. 2011. A new classification and linear sequence of extant gymnosperms. *Phytotaxa* 19: 55–70.

3. Filing specimens into species folders

- 3.1. The arrangement of species in each genus is reflected on the relevant cupboard list. The species are listed alphabetically on the cupboard list and the numerical filing number (if filed systematically) is indicated on the right. In the collection, the filing number and species name are indicated in pencil at the bottom right-hand corner of the species folder.

At PRE the specimen arrangement is further subdivided into the following major geographical regions: Flora of southern Africa (FSA), Tropical Africa (rest of Africa), Indian Ocean Islands, Sub-Antarctic Islands, and Extra Africa (rest of the world). Within these major regions the specimens are arranged according to country and then province, as they occur geographically in South Africa from northwest to southeast.

- 3.2. Consult 'How to arrange specimens' in Victor *et al.* (2004: 44) for filing of specimens with incomplete determinations, doubtful identifications, hybrids, undescribed species and cultivated or naturalised specimens.
- 3.3. Species folders are filed in genus covers. Care should be taken not to file too many species folders in a genus cover as it will increase the risk of damage to the specimens.