



## Using taxonomic treatments to assess an author's career: the impactful Jocélia Grazia

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### Abstract

Here we present a descriptive analysis of the bibliographic production of the world-renowned heteropterist Dr. Jocélia Grazia and comments on her taxonomic reach based on extracted taxonomic treatments. We analyzed a total of 219 published documents, including scientific papers, scientific notes, and book chapters. Additionally, we applied the Plazi workflow to extract taxonomic treatments, images, tables, treatment citations and materials citations, and references from 75 different documents in accordance with the FAIR (Findability, Accessibility, Interoperability, and Reuse) principles and made them available on the Biodiversity Literature Repository (BLR), hosted on Zenodo, and on TreatmentBank. We found that Dr. Grazia published 200 new names, including species (183) and genera (17), and 1,444 taxonomic treatments in total. From these, 104 and 581, respectively, were extracted after applying the Plazi Workflow. A total of 544 figures, 50 tables, 2,242 references, 2,107 materials citations, and 1,101 treatment citations were also extracted. In order to make her publications properly citable and accessible, we assigned DOIs (Digital Object Identifiers) for all publications that lacked this persistent identifier, including those that were not processed (88 in total), therefore enhancing the open-access share of her publications.

**Key words:** Open access, taxonomic treatments, TreatmentBank, taxonomic range, biography

### Introduction

Dr. Jocélia Grazia is one of the most prolific heteropterists in history and certainly one of the most important in Brazil. With more than 200 publications and a career that spans over 50 years, she helped to train over three generations of heteropterists in Brazil, shaping the field of systematics and taxonomy for Pentatomoidea in the country and worldwide. This fruitful career continues to inspire younger generations, especially when her unswerving dedication to her research continues to encourage students all over the country. A pure descriptive and statistical look into such a remarkable career does not make justice to the contributions of Dr. Grazia; however, it is a fair attempt to assess the extent of her taxonomic productivity and reach over these five decades of work and dedication to stink bugs.

Taxonomic treatments are sections of taxonomic papers carrying information on a specific taxon concept that relies on the author's interpretation of that specific concept (Catapano 2010). In a regular taxonomic paper, for instance, there might be one or several treatments, whereas in a checklist or catalog, hundreds could exist. This section, or treatment, can be semantically enhanced to include a variety of information usually associated with taxonomic treatments (e.g., other treatment citations, material citations, and their attributes such as coordinates, collectors' names, etc.), allowing automated machine processing and analyses of these data (Miller *et al.* 2015; Rivera-Quiroz *et al.* 2020). This process adds value to the taxonomic publication and data which would otherwise be trapped into the portable document format (PDF), a flat-format that does not allow for easy automation and reuse of the data

within it (Agosti *et al.* 2019). It also allows for the correct and specific citation of taxonomic information since this mechanism enables that taxonomic treatments (e.g., descriptions, keys) can be specifically cited instead of the entire original source. The liberation of treatments is possible due to Plazi's efforts in the biodiversity field and the decade-old free and open-source software called GoldenGATE Imagine (GGI) (Sautter *et al.* 2007) as a core element of the TreatmentBank services and Plazi workflow (Agosti & Egloff 2009). These treatments are considered data and thus are legally made findable, accessible, interoperable, and reusable (the FAIR principles) (Agosti & Egloff 2009), after their extraction since they are immediately made available on the Biodiversity Literature Repository (BLR, <https://biolitrepo.org/>) and on TreatmentBank, which almost instantly notifies the Global Biodiversity Information Facility (GBIF.org 2020). Similarly, published figures in taxonomic publications, often associated with treatments, are also made FAIR via BLR, including the minting of a digital object identifier (DOI). BLR is a community on Zenodo (European Organization For Nuclear Research & OpenAIRE 2013), the long tail research data repository maintained by the European Center for Nuclear Research (CERN). All the related parts (figures, treatments, and original sources) are interconnected through the citation of their respective DOIs allowing for each of their parts to receive the deserved credit, to be cited, and found individually if needed.

The goal of this analytical homage is to present a numerical overview of Dr. Grazia's publishing career, contributing to the openness of her important contributions to true bug taxonomy and systematics. This analysis was enabled by applying Plazi's state-of-the-art technologies and workflow to make Grazia's taxonomic treatments free and FAIR.

## Methods

### Data Acquisition & Pre-analyses

Metadata of each of the 219 publications were stored in a Google Spreadsheet and exported as a CSV file, including additional information on the digital copy quality and type of taxonomic content (Guidoti *et al.* 2020), which were the first steps to define how each paper would be processed. Only digital-born documents with headings including the respective taxonomic name of the treated taxon concept were processed through Plazi's workflow. The remaining publications were separated to be uploaded to Zenodo (see *DOI Registration* section below). Information on the number of treatments and proposed taxa were manually assessed for all papers and compared with the ones extracted through Plazi's workflow to guarantee data consistency. A CSV file summarizing this information was also made available (Guidoti *et al.* 2020). Abstracts, including html emphasis tags, were gathered (manually typed for the non-OCR'd papers) for the publications that were batch-uploaded to Zenodo in order to fulfill its data-requirements. This and the other Zenodo required fields were included in a separate spreadsheet (Guidoti *et al.* 2020). The majority of the copies were obtained with authorization from Dra. Grazia's lab private repository and a few were obtained through institutional access granted to Plazi by its many collaborators and partners.

### DOI Registration

DOIs were automatically minted by Zenodo when they were absent in the uploaded publications. To prevent minting a new DOI for a publication with an existing one, all pre-selected papers lacking a DOI were processed by the OpenRefine-Refindit Reconciliation Tool (Guidoti 2020a). This is an open-source tool focused on connecting Refindit (<https://refindit.org/>) to OpenRefine. The first, is a free proxy API (application programming interface) developed by Pensoft which connects the user to all major reference databases, including CrossRef and DataCite, two of the most used DOI providers. OpenRefine is an open-source software focused on data wrangling and manipulation. The batch upload to Zenodo was made by yet another open-source tool, Lycophron, in its early stages of development.

### Treatment Extraction & Data Gathering

Treatment extraction and semantic enhancement were performed with GoldenGATE Imagine V.3 (Sautter *et al.* 2007; <http://plazi.org/resources/treatmentbank/goldengate-editor/>). Each selected article was individually extracted and/or corrected. The extracted treatments and data are available on Plazi's TreatmentBank, Zenodo, and GBIF. The data were then gathered using TreatmentBank's APIs: Article's Collection Statistics and Treatment Collection Statistics (<http://tb.plazi.org/GgServer/dioStats> and <http://tb.plazi.org/GgServer/srsStats>, respectively) and the resulting CSV files were also published on Zenodo (Guidoti *et al.* 2020). The API parameters used in each of the

performed calls are summarized in Table 1. A list of all documents and their respective general metadata and the affiliation country of co-authors were provided in two different CSV files, also included in the dataset deposited in Zenodo (Guidoti *et al.* 2020).

### Data Wrangling and Cleaning

Co-authors countries and authors' names were cleaned and manipulated to allow for the analyses. Despite cleaning authors' names and separating when multiple authors were provided per item (e.g., authority names), they were not conciliated, as this is currently one of the major issues in biodiversity informatics and imposes challenges beyond the scope of this analytic paper. The original files were included in the published dataset, but the resulting files were not uploaded as they can be obtained from the scripts and original files (Guidoti 2020a). The wrangling scripts were written in Python and published in a Github repository which was in turn submitted to Zenodo (Guidoti 2020b). The input file names and the running instructions were included in the repository's README.

### Data Visualization

Data visualizations were built using Google Data Studio (Google 2020). Data from both pre-analyses and TreatmentBank were used to build the three plates, which were independently deposited in Zenodo. Data exploration, tidying, and \*.csv exports were performed by Python scripts, also deposited in Zenodo.

## Analyses

### Publications Overview

Jocélia Grazia published 219 items up to 2019, in a total of 2,497 pages, including a grand total of 183 new species. Among these publications, there are book chapters, reports, and journal articles. The latter were distributed in a total of 51 different journals and magazines, Zootaxa being the most common, followed by Iheringia, Série Zoologia and the Anais da Sociedade Entomológica do Brasil. The year of 2012 was the most prolific one, with 11 publications, almost 2.5 times the average, and the only year that Grazia surpassed the mark of 10 publications per year. Grazia's network of co-authors is highly concentrated in Brazil, many orders of magnitude in front of the second place, which is essentially shared between Argentina and the United States of America. Other countries, such as Colombia, Venezuela, Uruguay, and Australia, were also observed. Finally, the top 5 most frequent co-authors is heavily populated by former students, including positions 1 to 4, with Dr. Cristiano F. Schwertner as the most frequent co-author. A complete summary of this data can be found in a dashboard (Fig. 1).

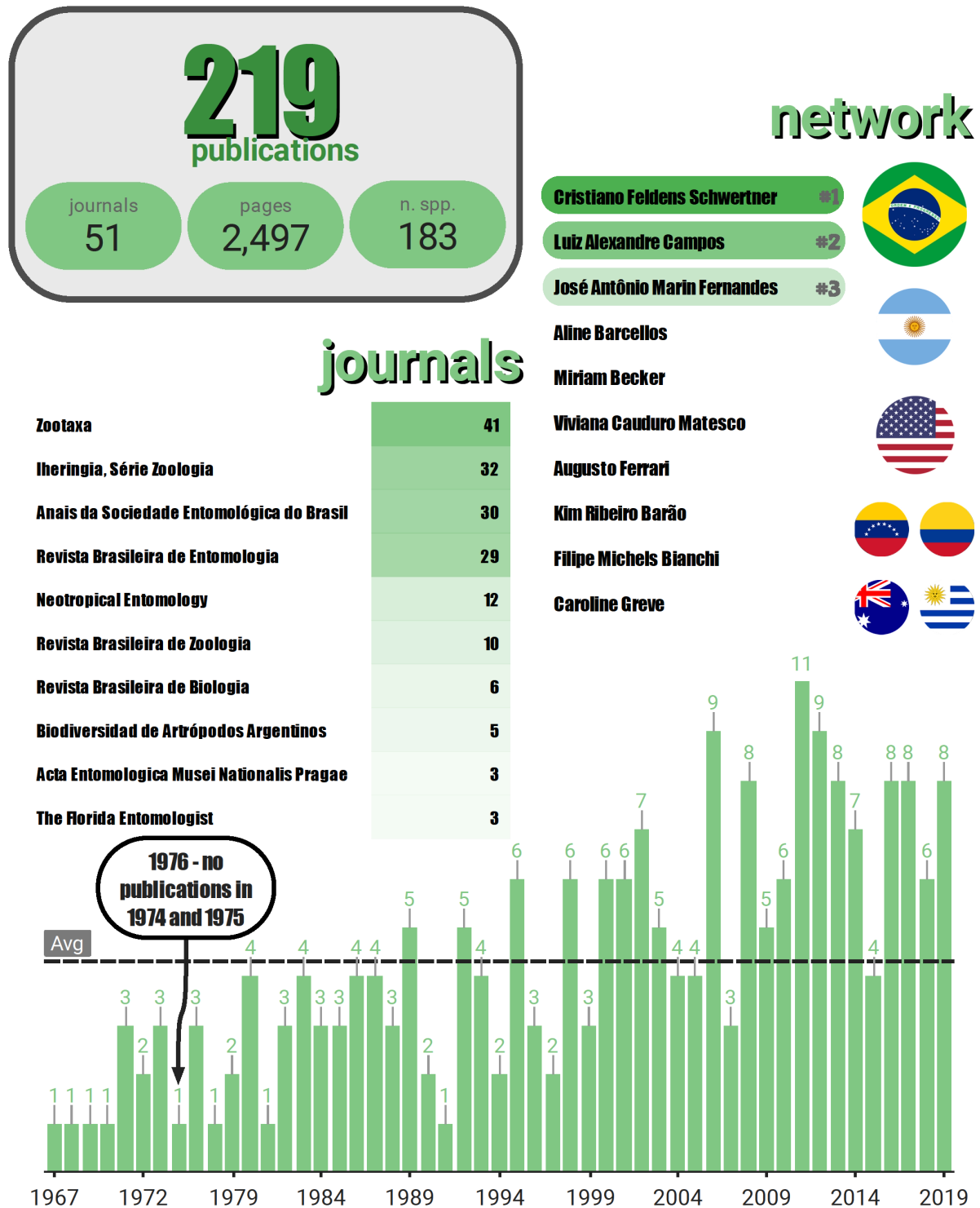
### Pre-analyses

Before engaging in treatment extractions and analyses, we performed an initial evaluation to frame Grazia's publications landscape in order to define which papers we would be able to extract and which ones would only be uploaded to Zenodo. The results of these pre-analyses are displayed in a dashboard (Fig. 2). Based on Plazi's legal understanding, around 74% of Grazia's publications were open-access (Agosti & Egloff 2009; Egloff *et al.* 2014, 2016). Also, 57.5% of Grazia's publications were digitally-born, which eases the treatment extraction process since we wouldn't have to consider optical character recognition quality beforehand. Additionally, 98% of the provided copies were the official published ones (not preprints or similar) and around 58% of these had DOIs. When extending the analyses to the taxonomic content of Grazia's publications, we noticed that almost 96% of the papers included treatments of any sort, but a lower fraction (75%) *de facto* included taxonomic treatments. However, around 64% of these treatments presented a heading with the taxon concept label clearly indicated, including the taxonomic name. This is an important remark as this heading is a pivotal part of the current treatment modelling in Golden-Gate Imagine.

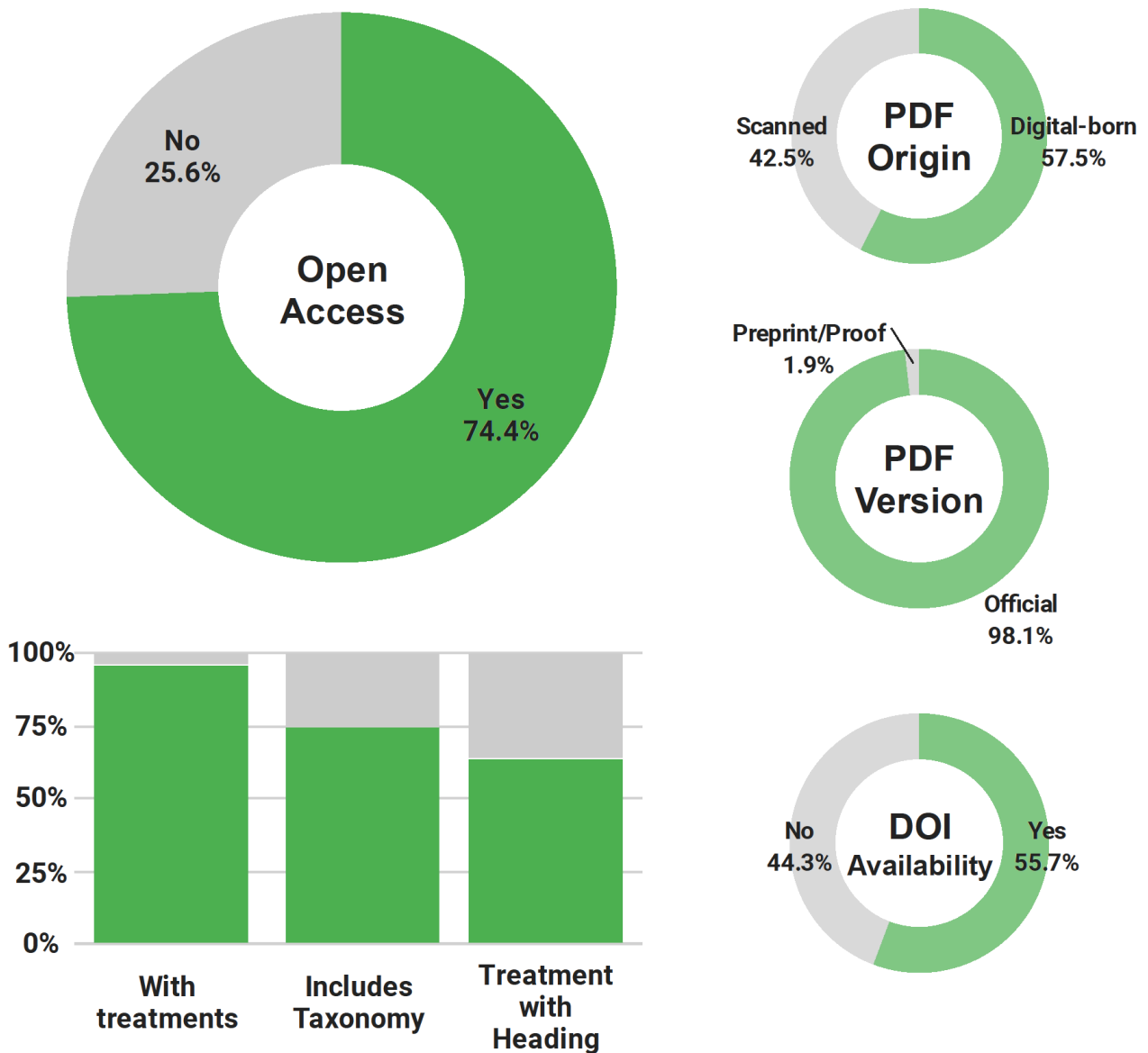
### Treatment Analysis

A total of 581 treatments from 75 publications were extracted. From the remaining 144 publications, 137 were uploaded to Zenodo and for 88 a DOI has been minted. A total of 1,101 treatment citations, 2,107 materials citations, 544 figures, 50 tables, and 2,242 bibliographic references were extracted. These data are now featured in Zenodo, GBIF, and RefBank (<http://refbank.org/>), as well as in Plazi-powered web applications such as Synospecies (<https://synospecies.plazi.org/>) and Ocellus (<https://ocellus.info/>). Of a total of 183 new species described by Grazia, 96

were extracted and included in TreatmentBank, which represented 16.5% of the extracted treatments. From the total extracted treatment count, almost 79% dealt with taxa at the species level. Grazia was the most cited taxonomic author, followed by the prominent Swedish entomologist, Carl Stål with almost half of the citations, and Dr. Luiz A. Campos, a former student and current professor in Brazil. Ruckes, Froeschner, and Stål were the most cited authors in treatment citations, respectively. Fritz Plaumann, a frequent name in specimens labels in natural history collections in Brazil, was the most recurrent collector in Grazia's studied material, followed by Dirings and Alvarenga. This and a heatmap showing the collecting country of the studied material is also provided in a dashboard (Fig. 3).



**FIGURE 1.** Jocélia Grazia's publications overview. Dashboard highlighting a production timeline and the most important stats on Grazia's publication career, including co-author network with their most frequent affiliation countries and the most frequent journals (doi: <https://doi.org/10.5281/zenodo.4484220>).



**FIGURE 2.** Pre-analyses of Grazia's entire corpus of publications. Data openness, graphic quality of the available copy and DOI availability are some of the aspects assessed. Conditions related to treatment extractions were also assessed, such as the presence of taxonomic treatments, whether the treatments are taxonomic, and if they present the taxon concept, which includes the taxonomic name and authority as headings (doi: <https://doi.org/10.5281/zenodo.4484241>).

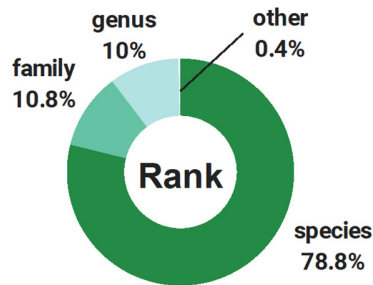
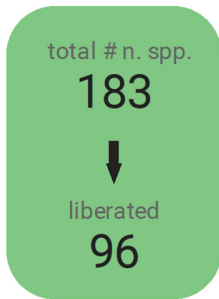
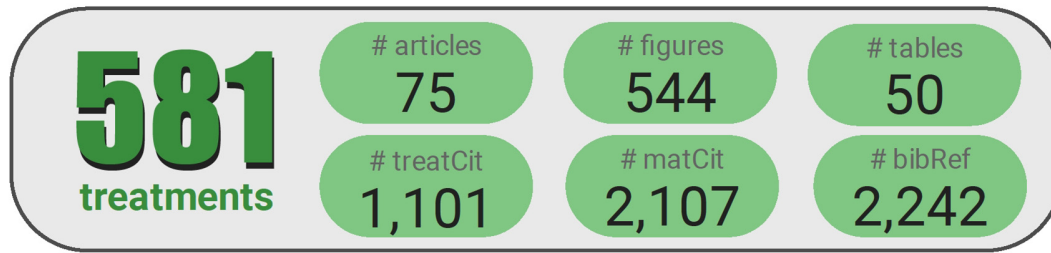
## Final Remarks

This was the first attempt to analyze the taxonomic range of a fruitful and remarkable career using Plazi's treatment concept and infrastructure. Other taxonomic and analytic papers already used this infrastructure and conceptual framework (Castillo & Dikow 2017; Rivera-Quiroz *et al.* 2020) but not to analyze one's career. Grazia's career is an incredible one and her contribution stands and lives beyond these numbers. As most of the authors of this paper are former students of Grazia, it was an honor to extract and analyze treatment-related data in the context of this festschrift.

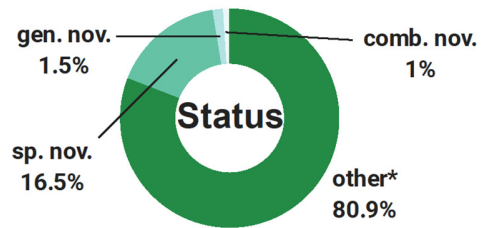
**TABLE 1.** List of parameters used in each query made in TreatmentBank's API (application programming interface) for the gathering of treatment data (CAV, Count All Values; CDV, Count Distinct Values; SIV, Show Individual Values; Sum V, Sum of Values)

API Call/CSV	API Endpoint	Parent Field	Field name	Filtered Values	Operation	Output	Order by	
general_data	<a href="#">dioStats</a>	Bibliographic Meta Data	Document Author	%Grazia%	CDV	Yes	No	
		Content Summary Data	Number of Treatments		-	Sum V	Yes	No
			Number of Treatment Citations		-	Sum V	Yes	No
			Number of Material Citations		-	Sum V	Yes	No
			Number of Figures		-	Sum V	Yes	No
			Number of Tables		-	Sum V	Yes	No
			Number of Bibliographic References		-	Sum V	Yes	No
			collecting_country	<a href="#">srsStats</a>	Bibliographic Meta Data	Document Author	%Grazia%	CDV
collector_name	<a href="#">srsStats</a>	Materials Data	Number of Material Citations	-	CAV	Yes	Yes	
		Materials Citation Data	Collecting Country		-	SIV	Yes	No
			Document Author		%Grazia%	CDV	No	No
			Number of Material Citations		-	CAV	Yes	No
			Collector Name		-	SIV	Yes	No
			Document Author		%Grazia%	CDV	No	No
			Number of Material Citations		-	CAV	Yes	Yes
			Collector Year		-	SIV	Yes	No
			Document Author		%Grazia%	CDV	No	No
			Number of Treatment Citations		-	CAV	Yes	No
Number of Cited Authors		-	SIV	Yes	No			
treatCit_cited_authors	<a href="#">srsStats</a>	Bibliographic Meta Data	Document Author	%Grazia%	CDV	No	No	
		Citation Data	Number of Treatment Citations		-	CAV	Yes	No
			Cited Authors		-	SIV	Yes	No
			Document Author		%Grazia%	CDV	No	No
			Number of Treatment Citations		-	CAV	Yes	No
			Document Author		%Grazia%	CDV	No	No
			Taxon Authority Name		-	SIV	Yes	No
			Document Author		%Grazia%	CDV	No	No
			Document UUID		-	CDV	Yes	Yes
			Taxonomic Status		-	SIV	Yes	No
Document Author		%Grazia%	CDV	No	No			
taxonomy_status	<a href="#">srsStats</a>	Document & User Data	Document UUID	-	CDV	Yes	Yes	
		Taxonomic Data	Taxonomic Status		-	SIV	Yes	No
			Document Author		%Grazia%	CDV	No	No
			Document UUID		-	CDV	Yes	Yes
			Document & User Data		-	SIV	Yes	No
			Bibliographic Meta Data	Document Author	%Grazia%	CDV	No	No
			Document & User Data	Document UUID	-	CDV	Yes	Yes
			Taxonomic Data	Rank of Taxon	-	SIV	Yes	No

# liberated data report



## taxonomic overview

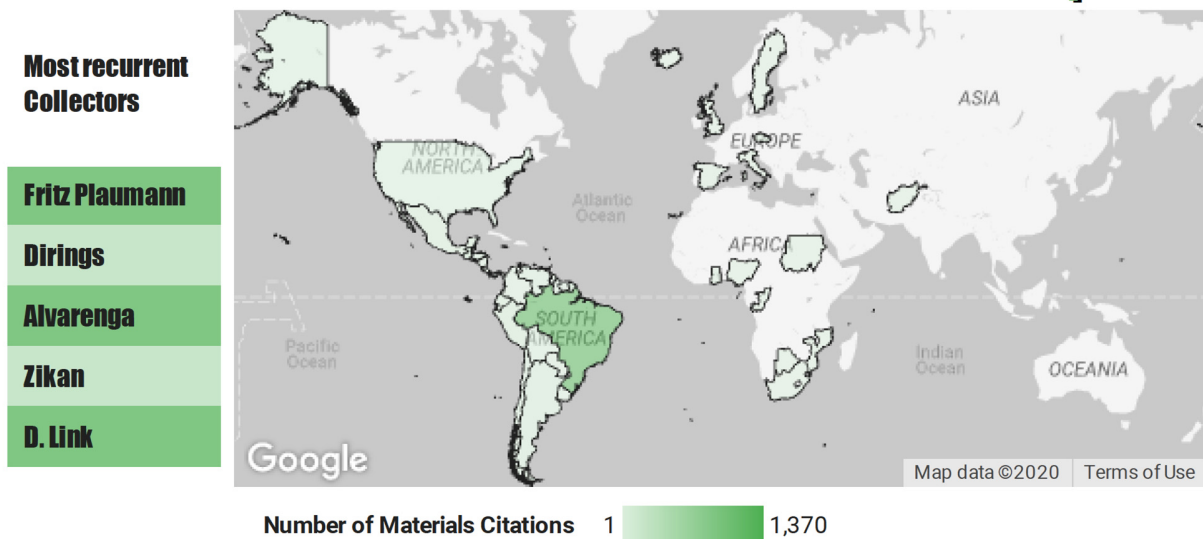


## treatment report

Taxonomic Authority	Number of treatments
Grazia	94
Stål	53
Campos	30
Rolston	30
Dallas	25

Taxonomic Authority	Number of treatCit
Ruckes H	53
Froeschner	51
Stål C	47
L. H. Rolston	38
Kirkaldy G. W	32

## material citation report



**FIGURE 3.** Dashboard including the overall stats of the liberated data, taxonomic overview, treatment and material citation reports. On the taxonomic status donut chart, ‘other’ means treatments that are not taxonomic acts. Abbreviations: treatCit, treatment citations; matCit, material citations; bibref, bibliographic references (doi: <https://doi.org/10.5281/zenodo.4484267>).

## Acknowledgements

We would like to thank Dr. Luiz Campos for the acceptance of this innovative idea, his understanding and flexibility that allowed us to complete the project. Dr. Cristiano Schwertner for helping brainstorming the initial idea of this project, and Dr. Guido Sautter, for the remarkable decade-long work ahead of GGI development.

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## Jocelia Grazia's List of Publications

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