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#### *About the Institute*

The Hunt Institute for Botanical Documentation, a research division of Carnegie Mellon University, specializes in the history of botany and all aspects of plant science and serves the international scientific community through research and documentation. To this end, the Institute acquires and maintains authoritative collections of books, plant images, manuscripts, portraits and data files, and provides publications and other modes of information service. The Institute meets the reference needs of botanists, biologists, historians, conservationists, librarians, bibliographers and the public at large, especially those concerned with any aspect of the North American flora.

Hunt Institute was dedicated in 1961 as the Rachel McMasters Miller Hunt Botanical Library, an international center for bibliographical research and service in the interests of botany and horticulture, as well as a center for the study of all aspects of the history of the plant sciences. By 1971 the Library's activities had so diversified that the name was changed to Hunt Institute for Botanical Documentation. Growth in collections and research projects led to the establishment of four programmatic departments: Archives, Art, Bibliography and the Library.

GUIDE-LINES AND INSTRUCTIONS FOR THE PREPARATION OF MONOGRAPHS  
FOR FLORA NEOTROPICA

For the purposes of Flora Neotropica, the Neotropics is defined as the Western Hemisphere continental land mass lying between the Tropics of Cancer and Capricorn, together with adjacent islands and including those of the West Indies, southern Bahamas, and Galapagos. No altitudinal or zonal exclusion would be made within the Tropics of Cancer and Capricorn. There must be some flexibility of areal interpretation and delimitation for certain taxa where interfingering of broad floras occurs.

To achieve unity and uniformity in the series of monographs for Flora Neotropica, contributors are asked to follow the principles, sequence, content, and instructions indicated below:

I. Taxonomic Presentation.

- A. General. The content of the introductory chapters is obviously a matter of judgment for each individual author; the following refers to subjects which the Committee considers to represent minimal requirements to be dealt with in the original treatment.
1. The principal title of the series of monographs shall be Flora Neotropica.
  2. Monographs may be at the ordinal, familial, subfamilial, tribal, generic, or in complex genera, by arrangement at the infra-generic level.
  3. Typescripts submitted for publication as monographs for Flora Neotropica shall be subject to the invitation, review, acceptance, and editorial adjustment by the Staff Committee of the O.F.N. The Staff Committee consists of the Scientific Directors with the Executive Director as Chairman.
  4. Format shall be uniform, and in octavo. ?

5. The Flora Neotropica shall be published in English. The obvious exceptions will be quotations in non-English languages, and Latin diagnoses which would be employed in proposals of new taxa.
6. Monographs may be published as they are accepted, without regard to order of taxonomic or hierarchical sequence.
7. The selections of plant names employed in monographs of Flora Neotropica will conform to the application of names as set forth in the International Code of Botanical Nomenclature adopted by the Ninth International Botanical Congress, Montreal, August 1959, or any subsequently adopted code.
8. Extralimital taxa should in general be excluded. This would apply especially to subordinate elements of large genera which are chiefly extratropical, as in Castilleja. When the subordinate elements are preponderantly neotropical, a few temperate ones may reasonably be included.
9. Monographers are urged to consult as much authentic plant material as possible, especially type material. They are further urged themselves to check pertinent literature, and not to depend on secondary sources.

B. The Monograph. Introductory Section.

1. General remarks on the delimitation and scope of the group (Taxon) treated, its general geography and ecology.
2. Historical account of the study of the group.
3. Consideration of general morphology, anatomy, cytology, and cytogenetics, breeding patterns, chemotaxonomy, and serology, when information is available, supplemented by appropriate illustrations, tables and diagrams which should offer a comparison of various diagnostic features, diagrams of flowers, fruits, etc.

4. Consideration of the taxonomic position of the group, and any appropriate discussion on phylogeny and evolution.

5. Literature bearing on the above general categories.

C. Systematic Section.

1. The Family (or highest taxon in the category treated):

- a. Scientific name, authority, nomenclatural type, and derivation of name.
- b. Synonymy, bibliographic citations and pertinent literature.
- c. Technical description.
- d. General remarks (may include considerations of nomenclature and morphology).
- e. Consideration of geography and ecology, if here desirable.
- f. Key to the next subordinate taxa; in less complex families to genera.
- g. Extralimital subfamilies, tribes, genera, or species would not ordinarily be treated, but for completeness may be referred to in the "General Remarks (B.1)."

2. The Genus (would apply also for any monogeneric family):

- a. Scientific name, authority, nomenclatural type with reference to I.N.G. cards. Do not italicize.
- b. Synonymy, bibliographic citations and pertinent literature, if any; citation of types, lectotypes or neotypes. Italicize names of synonyms.
- c. Technical description of the genus, with chief emphasis on characterization of neotropical elements.
- d. Type of the genus or lectotype, with citation. Place in separate paragraph.
- e. Geographic distribution, frequency and ecology, if not already covered under B.

- f. Other pertinent remarks and discussions (common names, uses, etc.) if not already covered under B.
  - g. Key to the subgeneric or infrageneric taxa, if any.
  - h. Key to the species (and/or next subordinate rank).
3. The Species (including monospecific genera):
- a. Scientific name and authority; derivation of the epithet, if instructive.
  - b. Synonymy, at least name-bringing and synonymy pertinent to neotropical elements, with citation of types, lectotypes or neotypes; place of deposit (use herbarium symbols of Lanjou & Stafleu, Index Herbariorum, latest edition).
  - c. Technical description of the species, inclusive of pollen description, chromosome number (literature or voucher specimen), type of embryo sac, etc, if known and appropriate here. Diagnostic characters of species should be illustrated, at least those for new species.
  - d. Type of the species in a separate paragraph starting "Type.", with citation, or lectotype or neotype, with citation; place of deposit. Indicate clearly when the type has not been consulted by the abbreviation n y.
  - e. Extralimital species may be included if their treatment would strengthen that of the genus and if they are comparatively few in number.
  - f. Geographic distribution, frequency and ecology in a separate paragraph headed "Distribution." (Fig. 1, etc, as appropriate). To achieve uniformity and accuracy in the spelling of geographic names, the Index to Maps of Hispanic America 1:1,000,000, American Geographical Society Publication 5, 1943, is designated as the standard, supplemented by modern official governmental maps of countries concerned.

- g. Subspecific or infraspecific taxa, if any, including the nominate, are to be treated as components of the species, with keys, citation of types, etc. Descriptions should be subordinated to that of the species as a whole. There would, therefore, be no "typical subspecies" or "variety" from which the other components vary. Only basionyms in new combinations and those synonyms for which it is impossible to refer to one of the subordinate taxa should be cited under the species as a whole; all others should be cited under the appropriate infraspecific taxon. All citation of types should be done under the appropriate infraspecific taxon if the species is subdivided, but there should be a statement and distribution for the species as a whole and one also for each of the included subordinate taxa.
- h. Vernacular names (where significant) and uses, with citation of collection numbers, would be placed in a separate paragraph headed "Vernacular names and uses."
- i. Other pertinent remarks (taxonomic problems, phenology, common names indicating origin and area of application, uses, etc).
- j. Citation of critical specimens studied, to include date of flowering and/or fruiting. Complete citation of abundant and widespread species (or infraspecific taxa) need not be given. Within parentheses, following the collection number, use abbreviations of Lanjouw & Stafleu in Index Herbariorum. The order of countries and their subdivisions will be as indicated in the appendix (by common practice from N to S and from W to E). Names of countries should be written in capitals and followed by a period. Names of their subdivisions should be in lower case, except the initial letter, and should be followed by a colon

(example, VENEZUELA. Bolivar:). Citation of specimens should be in a single continuing paragraph. Initials of collector's names should normally be omitted except in the citation of types unless their omission would cause serious confusion. Dates should be included. The collector's name and his number, or "s n", should both be underlined (for italics). Collections within a given geographical subdivision should be separated by colons, separate collections by semicolons, and the last followed by a period. The first collection cited in each subdivision should begin with an initial capital letter.

4. Indexes by species and collector and number of all cited and/or examined specimens.
5. Index of technical names and common names.
6. It is recommended that distribution maps, if useful, be prepared for any taxon. Maps may be obtained from the office of the Executive Director.

II. Instructions on format, style (abbreviations, etc), use of italic, form of keys, etc.

To promote cohesiveness, to facilitate consultation and ease of bibliographic reference, models are being prepared as guides to monographs. These models will conform to instructions, as indicated below, which will serve equally for treatments of vascular and non-vascular plants.

1. An official printer has been selected, so as to promote a better working facility between editors and printer, a consistent format, type face, and binding.
2. Measurements, altitudes, and water depth will be designated in units of the metric system (except in quotation). Do not use commas in numbers.

3. Standard abbreviations (See Stearn, Botanical Latin, 1966) and symbols to be used in text may include the following without punctuation: ♂, ♀,  $\frac{\text{d}}{\text{f}}$ ,  $\frac{\text{o}}{\text{v}}$ , degree; cf, confer; i e, id est; l c, loco citato; litt, litteratura; viz, videlicet; q v, quod vide; n v, non visus, non vidi; sp, species; spp, species (pl); var, varietas; gen, genus, sub, as prefix; alt, use consistently for "altitude" or "elevation"; m, meter; dm, decimeter; cm, centimeter; mm, millimeter; u, micron; diam, diameter; N, north; ca, circa, use consistently in description for about, approximately, or more or less; E, east, S, south, W, west, SW, southwest (all appropriate compass points); C, centigrade; n, gametic chromosome number; 2n, somatic chromosome number; x, basic chromosome number. The fuller employment of abbreviations might properly be left to the editors.
4. Do not abbreviate names of authors.
5. Literature will be cited in the form and abbreviations given in the lists compiled by Schwarten & Rickett, Bull. Torrey Club 85: 277-300. 1958; 88: 1-10. 1961. Leave a space after the volume number with its colon.
6. Italic will be used for all non-English words used in the text, except for Latin diagnoses, technical terms, and commonly used abbreviations derived from non-English words (cf, litt, etc, l c).
7. Specific epithets will be written in lower case.
8. Key will be dichotomous, indented, and numbered. Uniform style of keys is most important. Do not include "leads" (dotted lines). Close each step of the key with a period. Place a period after each name in the key.
9. Figures (line drawings, diagrams, graphs, photographs) will be numbered consecutively by Arabic numbers; parts of figures to be designated by lower case letters. Each figure should be provided with an explicit

- caption. Voucher specimens for illustrations of plants should be in the legend. Figures should be prepared for reduction to a 5 x 7 inch page (12.5 x 17.5 cm). Reference to figures in the text should be indicated consistently "Figs 1-4" etc in sequential order, and should appear in the order used in the text.
10. Tables should have an appropriate heading, and should bear consecutive Roman numbers in the order of appearance in the text. They should be cited "TABLE I", etc.
  11. Footnotes should bear consecutive Arabic numbers in the order of appearance in the text. Footnotes should be inserted in the typescript where each one occurs, not at the bottom of the page, and should be set off by lines above and below.
  12. For geographical place names, rivers, mountains, etc, Index to Maps of Hispanic America 1:1,000,000, American Geographical Society Publication 5, 1943, is designated as standard.
  13. Outline maps will be offered to the author.
  14. Typescript should be prepared as follows:
    - a. Submit one original or ribbon copy on bond paper, and one carbon copy (or preferably xerox), each on 8-1/2 x 11 inch paper, typed on one side of the page only.
    - b. Triple-space throughout, including all text, quotations, literature cited, footnotes, and captions.
    - c. Number each page consecutively in upper right-hand corner, and repeat author's name on each page.
    - d. Indent all paragraphs, except in formal presentation of taxa which should start flush on the left-hand margin.
    - e. Provide ample margins of at least 3 cm on left side of page, and at top and bottom, and 2 cm on right side.

- f. Leave four spaces between sections of the typescript, and between the presentation of generic and specific taxa.
- g. Write out numbers of a single digit (from one to ten), unless it is in a series of numbers, except in keys, descriptions, and in quotations. Numbers of two or more digits should be written in Arabic numerals. Use decimal point followed by zero, as 1.0-2.2 mm; do not use 1-2.2 mm. Do not leave space on either side of hyphen.
- h. Quotation marks generally (except as a part of quotation) should be placed outside of commas, periods, inside all other punctuation. Single quotes are used in the same manner, unless they indicate fancy names of cultivated plants, in which instance the single quote belongs inside any punctuation.
- i. Use commas to separate all parts in a series, i e before "and" and "or."
- j. Leave two spaces after periods at the ends of sentences. Leave one space after initials in the literature: A. J. Brown, not A.J.Brown.
- k. Headings: Headings may be written in caps, or caps and lower case. Type face and positioning will be indicated by the editors.
- l. Do not begin sentence with an abbreviation.
- m. Write out generic name the first time it occurs in each paragraph, and where two or more generic names with the same initial occur in the paragraph.

SUPPLEMENT I

GEOGRAPHIC SEQUENCE IN THE CITATION OF HERBARIUM SPECIMENS

Sequence of geographical arrangement as is commonly practiced by geographers is given below. It follows a logical procedure and would facilitate the consultation of Flora Neotropica if it were so employed in our Guide Lines and particularly in the Models now under preparation.

For the further breakdown of citations in political divisions (states, provinces, etc) within each country, the logical sequence would also be from North to South and from West to East.

REFERENCE: A. G. S. Maps of the Americas

1:5,000,000

1:1,000,000

I. Mexico, Central America

1. Mexico
2. Guatemala
3. British Honduras
4. Honduras
5. El Salvador
6. Nicaragua
7. Costa Rica
8. Panama (including Canal Zone as a subdivision)

II. West Indies

1. Cuba
2. Bahama Islands
3. Jamaica
4. Hispaniola (Haiti - Republica Dominicana)
5. Puerto Rico
6. Virgin Islands

II. West Indies continued ---

7. Leeward Islands
8. Windward Islands
9. Other islands in geographical sequence

III. South America (and off-mainland islands)

1. Colombia
2. Venezuela
3. Trinidad, Tobago
4. Guyana
5. Guyane Française
6. Suriname
7. Ecuador
8. Peru
9. Brasil
10. Bolivia
11. Chile
12. Paraguay
13. Uruguay
14. Argentina

1970

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January 23, 1971

Dr. Bassett Maguire  
The New York Botanical Garden  
Bronx, New York 10458

Dear Bassett:

We are finally in the preparatory stage of the manuscript for the genus Manihot. We have your directions for FLORA NEOTROPICA, but would be pleased if we could have a sample copy of one of the other monographs already prepared. While the instructions are explicit, there is no substitute for an actual monograph to be certain of our interpretation of some of the procedures. Cowan's monograph on Swartzia, would serve well. Could we have a copy on loan, a damaged copy or some samples from the monograph?

We note that you supply base maps for distributions. May we have sufficient to prepare 128 species maps? Or, if that seems to be unreasonable, we could compile maps with more than one species, using different designations for each taxon. Many of the species are represented by very few collections, and perhaps by judicious sorting, we could combine several on one map. I await your instructions (or desires) in this connection.

One more editorial matter: in listing the synonyms of the recognized taxa, we feel that it would be convenient to cite heterotypic and homotypic synonyms separately. Is this procedure acceptable?

Thank you for your attention to the above items.

Best regards,

David J. Rogers,  
Prof. of Biology