

Package ‘prepR4pcm’

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Title Prepare Data and Trees for Phylogenetic Comparative Methods

Version 1.0.0

Description Reconcile species names across datasets and phylogenetic trees for comparative biology workflows. Identifies mismatches due to formatting differences, taxonomic synonymy, and spelling errors. Produces detailed reports documenting how each name was resolved, which taxonomic authority was used, and what remains unresolved. Supports exact matching, name normalisation, synonym resolution via local taxonomic databases, and fuzzy matching for likely typos. Detects taxonomic splits and lumps. For methodological context, see Nakagawa et al. (2026) [<doi:10.32942/X2468Z>](https://doi.org/10.32942/X2468Z).

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URL <https://github.com/itchyshin/prepR4pcm>,
<https://itchyshin.github.io/prepR4pcm/>

BugReports <https://github.com/itchyshin/prepR4pcm/issues>

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avonet_subset *AVONET morphological trait data (subset)*

Description

A subset of ~920 bird species from the AVONET database (BirdLife taxonomy), covering 12 passerine families within the Corvoidea and allied clades. Contains morphological measurements and ecological traits.

Usage

avonet_subset

Format

A data frame with ~920 rows and 16 columns:

- Species1** Scientific name (BirdLife taxonomy)
- Family1** Family
- Order1** Order
- Beak.Length_Culmen** Beak length from culmen (mm)
- Beak.Length_Nares** Beak length from nares (mm)
- Beak.Width** Beak width (mm)
- Beak.Depth** Beak depth (mm)
- Tarsus.Length** Tarsus length (mm)
- Wing.Length** Wing length (mm)
- Mass** Body mass (g)
- Habitat** Primary habitat code
- Habitat.Density** Habitat density code
- Migration** Migration status
- Trophic.Level** Trophic level
- Trophic.Niche** Trophic niche
- Primary.Lifestyle** Primary lifestyle

Source

Tobias et al. (2022) AVONET: morphological, ecological and geographical data for all birds. *Ecology Letters* 25:581–597. doi:10.1111/ele.13898

crosswalk_birdlife_birdtree

BirdLife-BirdTree taxonomy crosswalk

Description

A crosswalk mapping species names between BirdLife International taxonomy and the BirdTree (Jetz et al. 2012) taxonomy. This is useful as a pre-built override table for reconciling datasets that use BirdLife names against phylogenies that use BirdTree names. See `reconcile_crosswalk()` to convert this into an overrides table.

Usage

crosswalk_birdlife_birdtree

Format

A data frame with ~11,000 rows and 4 columns:

Species1 Species name in BirdLife taxonomy

Species3 Species name in BirdTree taxonomy

Match.type Type of match: "1BL to 1BT" (one-to-one), "Many BL to 1BT" (lump), "1BL to many BT" (split), "Extinct", "Newly described species", "Invalid taxon"

Match.notes Additional notes on the match

Source

The crosswalk is distributed as supporting information with the AVONET database release (Tobias et al. 2022). It maps two underlying taxonomies, both of which should be cited if you use the crosswalk in published work — see the references below.

References

Tobias, J.A. et al. (2022) AVONET: morphological, ecological and geographical data for all birds. *Ecology Letters* 25:581–597. doi:10.1111/ele.13898

Jetz, W., Thomas, G.H., Joy, J.B., Hartmann, K. & Mooers, A.O. (2012) The global diversity of birds in space and time. *Nature* 491:444–448. doi:10.1038/nature11631

delhey_subset	<i>Plumage lightness data (subset)</i>
---------------	--

Description

A subset of ~650 passerine species from Delhey et al. (2019), with plumage lightness measurements and climate variables. Covers species from the same families as [avonet_subset](#) that have plumage data. Note that species names use underscores (e.g., "Corvus_corax"), making this useful for demonstrating name normalisation.

Usage

```
delhey_subset
```

Format

A data frame with columns:

TipLabel Species name with underscores (tree tip label format)

family Family name

annual_mean_temperature Annual mean temperature at range centroid

annual_precipitation Annual precipitation at range centroid

lightness_male Mean plumage lightness, males

lightness_female Mean plumage lightness, females

Source

Delhey et al. (2019) Reconciling ecogeographical rules: rainfall and temperature predict global colour variation in the largest bird radiation. *Ecology Letters* 22:726–736. doi:[10.1111/ele.13233](https://doi.org/10.1111/ele.13233)

mammal_amniote_example

Amniote-style mammal life-history sample

Description

A ~5,000-species sample of mammal life-history records, prepared to mirror the structure of the Amniote Life-History Database. Used by the `db-assembly-workflow_mammals` vignette to demonstrate assembling trait data from multiple sources before reconciling against a phylogenetic tree.

Usage

```
mammal_amniote_example
```

Format

A tibble with ~4,953 rows and 5 columns:

name Length-1 character vector. Scientific name (genus species), space-separated. Some rows carry trinomials.

female_body_mass_g Numeric. Female adult body mass (g); NA when unknown.

adult_body_mass_g Numeric. Sex-pooled adult body mass (g); NA when unknown.

litter_or_clutch_size_n Numeric. Mean offspring per reproductive event; NA when unknown.

litters_or_clutches_per_y Numeric. Number of reproductive events per year; NA when unknown.

Source

Myhrvold et al. (2015) An amniote life-history database to perform comparative analyses with birds, mammals, and reptiles. *Ecology* 96:3109. doi:10.1890/150846R.1

mammal_pantheria_example

PanTHERIA-style mammal life-history sample

Description

A ~5,400-species sample of mammal life-history records, prepared to mirror the structure of the PanTHERIA database. Used by the db-assembly-workflow_mammals vignette.

Usage

mammal_pantheria_example

Format

A tibble with ~5,416 rows and 4 columns:

MSW05_Binomial Length-1 character vector. Scientific name under MSW3 (Mammal Species of the World 3) taxonomy.

5-1_AdultBodyMass_g Numeric. Adult body mass (g); NA when unknown.

15-1_LitterSize Numeric. Mean litter size; NA when unknown.

16-1_LittersPerYear Numeric. Litters per year; NA when unknown.

Source

Jones et al. (2009) PanTHERIA: a species-level database of life history, ecology, and geography of extant and recently extinct mammals. *Ecology* 90:2648. doi:10.1890/081494.1

mammal_tetrapodtraits_example
TetrapodTraits-style mammal sample

Description

A ~5,900-species sample of mammal trait records, prepared to mirror the structure of the Tetrapod-Traits 1.0.0 database. Used by the db-assembly-workflow_mammals vignette.

Usage

```
mammal_tetrapodtraits_example
```

Format

A tibble with ~5,911 rows and 3 columns:

`Scientific.Name` Length-1 character vector. Scientific name (genus species), period-separated genus.species column name as in the source release.

`BodyMass_g` Numeric. Body mass (g); NA when unknown.

`LitterSize` Numeric. Mean litter size; NA when unknown.

Source

Moura et al. (2024) A phylogeny-informed characterisation of global tetrapod traits addresses data gaps and biases. *PLOS Biology* 22:e3002658. doi:10.1371/journal.pbio.3002658

mammal_tree_example *Mammal phylogenetic tree (example)*

Description

A 5,987-tip subset of the Upham, Esselstyn & Jetz (2019) VertLife mammal phylogeny, used by the db-assembly-workflow_mammals vignette to demonstrate reconciling species names from multiple trait sources against a tree. Tip labels use underscores (Genus_species); 76 tips carry an X_ prefix, denoting Mesozoic stem-mammal fossils grafted onto the molecular backbone via the Upham et al. "backbone-and-patch" framework.

Usage

```
mammal_tree_example
```

Format

An object of class phylo (from the ape package), with 5,987 tips and 5,986 internal nodes.

Details

Source confirmed by Santiago Ortega, who contributed the data, on issue #11.

If you use this tree in published work, please cite Upham et al. (2019) directly. The bundled object is a *subset* used for examples only — for analysis-grade trees, download the full credible set from <https://vertlife.org/phylosubsets/>.

Source

Upham, N.S., Esselstyn, J.A. & Jetz, W. (2019) Inferring the mammal tree: Species-level sets of phylogenies for questions in ecology, evolution, and conservation. *PLOS Biology* 17(12):e3000494. doi:10.1371/journal.pbio.3000494. Full credible sets at <https://vertlife.org/phylosubsets/>.

References

Other published mammal phylogenies suitable for comparative analysis (alternatives to Upham et al. 2019):

Faurby, S. & Svenning, J.-C. (2015) A species-level phylogeny of all extant and late Quaternary extinct mammals using a novel heuristic-hierarchical Bayesian approach. *Molecular Phylogenetics and Evolution* 84:14–26. doi:10.1016/j.ympev.2014.11.001

Bininda-Emonds, O.R.P. et al. (2007) The delayed rise of present-day mammals. *Nature* 446:507–512. doi:10.1038/nature05634

nesttrait_subset	<i>Nest trait data (subset)</i>
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Description

A subset of ~920 bird species from the global nest trait database (v2), covering the same Corvoidea + allied families as [avonet_subset](#). Contains nest site and structure information.

Usage

```
nesttrait_subset
```

Format

A data frame with columns:

Scientific_name Scientific name (HBW/BirdLife v5 taxonomy)

Order Order

Family Family

Common_name English common name

NestSite_ground Ground nesting (0/1)

NestSite_tree Tree nesting (0/1)

NestSite_nontree Non-tree elevated nesting (0/1)

NestSite_cliff_bank Cliff/bank nesting (0/1)
NestStr_scrape Scrape nest (0/1)
NestStr_platform Platform nest (0/1)
NestStr_cup Cup nest (0/1)
NestStr_dome Dome nest (0/1)
NestStr_primary_cavity Primary cavity nester (0/1)
NestStr_second_cavity Secondary cavity nester (0/1)

Source

Chia et al. (2023) A global database of bird nest traits. *Scientific Data* 10:923. doi:10.1038/s41597-023028371

pr_cite_tree	<i>Format the citations for a tree result</i>
--------------	---

Description

Given a `pr_tree_result` produced by `pr_get_tree()` or `pr_date_tree()`, emit a formatted citation block listing the backend used, the underlying paper(s), and per-tree source citations when the result is a multi-tree posterior. Useful when writing the methods section of a paper or when adding a tree provenance footnote to a figure.

Usage

```
pr_cite_tree(result, format = c("text", "markdown", "bibtex"))
```

Arguments

result	A <code>pr_tree_result</code> from <code>pr_get_tree()</code> or <code>pr_date_tree()</code> .
format	A length-1 character vector. One of: "text" (default) Plain-text citation block, suitable for printing or copy-pasting. "markdown" GitHub-flavoured markdown with bullets and headings; suitable for issue threads, PR descriptions, and README sections. "bibtex" One BibTeX entry per source. Use this to paste into a manuscript bibliography. Note: the entries are hand-rolled from package metadata, not pulled from a canonical bibliographic source — always sanity-check before submission.

Value

A length-1 character vector containing the formatted citation block. The result is also printed (invisibly returned) so calling `pr_cite_tree(res)` on its own at the console shows the block.

See Also

[pr_get_tree\(\)](#) / [pr_date_tree\(\)](#) for producing the `pr_tree_result` that this function formats.

Examples

```
# Build a minimal `pr_tree_result` by hand so the three citation
# formats are visible without a network call. In real use this
# object is returned by `pr_get_tree()` or `pr_date_tree()`.
fake_res <- structure(
  list(
    source      = "fishtree",
    tree        = ape::read.tree(text = "(Salmo_salar,Esox_lucius);"),
    backend_meta = list(tree_provenance = list())
  ),
  class = "pr_tree_result"
)

cat(pr_cite_tree(fake_res, format = "text"))      # human-readable
cat(pr_cite_tree(fake_res, format = "markdown")) # for a README
cat(pr_cite_tree(fake_res, format = "bibtex"))   # for a .bib file

# Realistic use after actually retrieving a tree from a backend:
if (requireNamespace("fishtree", quietly = TRUE)) {
  res <- pr_get_tree(c("Salmo salar", "Esox lucius"),
                    source = "fishtree")
  cat(pr_cite_tree(res, format = "markdown"))
}
```

pr_date_tree

Time-calibrate a topology using the DateLife chronogram database

Description

Wraps `datelife::datelife_use()` to add divergence-time calibrations to an existing phylo (or `multiPhylo`) using `DateLife`'s database of pre-computed chronograms (Sanchez Reyes et al. 2024, *Systematic Biology* 73:470). Returns a result with the same shape as [pr_get_tree\(\)](#) so downstream PCM workflows — including `pigauto`'s posterior-tree imputation — can consume it without further glue code.

Usage

```
pr_date_tree(
  tree,
  n_dated = 1L,
  dating_method = "bladj",
  check_ultrametric = TRUE,
```

```
    ...
  )
```

Arguments

tree	An ape::phylo (or multiPhylo) object: the topology (or topologies) to calibrate.
n_dated	A length-1 positive integer. How many calibrated trees to return per input topology. 1L (default) returns a single dated tree (DateLife's combined SDM-summary chronogram); > 1L triggers each = TRUE so DateLife returns one chronogram per source paper in its database (capped at n_dated). All resulting chronograms share the input topology — only the branch lengths vary across the returned set.
dating_method	A length-1 character vector. Forwarded to datelife::datelife_use(). One of "bladj" (default; fast, no calibration uncertainty) or "mrbayes" (Bayesian; slower, produces credible intervals).
check_ultrametric	Logical. After dating, check that the result is ultrametric and warn if not. Default TRUE. datelife::datelife_use() is supposed to produce ultrametric chronograms; this catches regressions.
...	Additional arguments forwarded to datelife::datelife_use().

Value

A list with class pr_tree_result and components:

tree	The dated topology — a phylo when n_dated = 1 or a multiPhylo when n_dated > 1.
matched	Tip labels of the input that DateLife was able to date.
unmatched	Tip labels of the input absent from DateLife's database (returned with no calibration applied).
mapping	A tibble with one row per input tip label, mirroring pr_get_tree()'s audit table: input_name, normalized_name, query_name, tree_name, in_tree, match_type, placement_status, and the four tnrs_* columns. placement_status and the tnrs_* columns are NA for DateLife dating, which applies no TNRS step.
source	Always "datelife" (paired with pr_get_tree()'s dispatch).
backend_meta	Includes dating_method, calibrations (per-node calibration table from DateLife), and the standard tree_provenance list (one entry per returned tree).

When to use this

Use pr_date_tree() when you already have a topology (e.g. from a published phylogeny or your own analysis) and want to attach divergence times. Use pr_get_tree() with source = "datelife" if you have only species names. Both end up calling the GitHub-only datelife package, but the starting point is different. Install datelife before calling this function — **prepR4pcm** does NOT pull it in via Suggests (its transitive dep tree can't be auto-resolved by pak on a clean CI image, so we keep it as an opt-in install): pak::pak("phylostatic/datelife").

What "n_dated > 1" actually returns

This is a common point of confusion. With `n_dated = 50`, `pr_date_tree()` does NOT change the input topology — it returns up to 50 chronograms that *all share* the input topology but differ in their branch lengths, because each variant is dated using a different source paper in DateLife's chronogram database (think: variant 1 uses Hedges et al. 2015, variant 2 uses Bininda-Emonds et al. 2007, etc.). So you get one topology and N versions of branch lengths, not N different topologies.

If you want **both** axes of variation (topology uncertainty + dating uncertainty), feed a `multiPhylo` of N topologies in. DateLife's `each = TRUE` mode is then applied per input tree, so the output reflects the cross-product of input topology and DateLife source. Example pipeline:

```
trees <- pr_get_tree(species, source = "rtrees",
                    taxon = "mammal") # ~100 topologies
dated <- pr_date_tree(trees$tree, n_dated = 5)
```

By contrast, `pr_get_tree(species, source = "datelife", n_tree = 50)` returns up to 50 chronograms where each variant comes from a different DateLife source — i.e. a different topology AND different branch lengths per variant, because DateLife's source chronograms aren't constrained to share a topology.

References

Sanchez Reyes, L. L., McTavish, E. J., & O'Meara, B. (2024). DateLife: Leveraging databases and analytical tools to reveal the dated Tree of Life. *Systematic Biology*, 73(2), 470–485. doi:10.1093/sysbio/syae015

See Also

`pr_get_tree()` for retrieval (species → tree); `pr_cite_tree()` for formatting the citations of the result; `reconcile_augment()` for filling tip-level gaps in an existing tree (a complementary operation to dating).

Examples

```
if (rlang::is_installed("datelife")) {
  # Example 1: one chronogram from a topology
  library(ape)
  tr <- read.tree(text =
    "(Rhea_americana,(Pterocnemia_pennata,Struthio_camelus));")
  res <- pr_date_tree(tr)
  res$tree # phylo (chronogram)
  res$backend_meta$dating_method # "bladj"

  # Example 2: per-source chronograms for posterior-tree PCMs
  res <- pr_date_tree(tr, n_dated = 5)
  class(res$tree) # "multiPhylo"
  length(res$backend_meta$tree_provenance) # one entry per tree
}
```

pr_extract_tips	<i>Extract tip labels from a phylogenetic tree</i>
-----------------	--

Description

Return the tip labels of a tree as a character vector, whether the tree is already an `ape::phylo` object in memory or lives in a Newick or Nexus file on disk. Convenience wrapper around `tree$tip.label` that also handles file input and multi-tree files (returns the tips of the first tree).

Usage

```
pr_extract_tips(tree)
```

Arguments

tree	An <code>ape::phylo</code> object, or a length-1 character vector giving the path to a Newick (<code>.nwk</code> , <code>.tre</code> , <code>.tree</code> , <code>.newick</code>) or Nexus (<code>.nex</code> , <code>.nexus</code>) file. Format is auto-detected.
------	---

Value

A character vector of tip labels (one element per tip).

See Also

[pr_normalize_names\(\)](#) for cleaning tip labels before joining against a data frame.

Other name utilities: [pr_normalize_names\(\)](#)

Examples

```
data(tree_jetz)
head(pr_extract_tips(tree_jetz))
```

pr_get_tree	<i>Retrieve a candidate phylogeny for a species list</i>
-------------	--

Description

Connects reconciled species names to an external phylogenetic resource and returns a pruned candidate tree plus a report of which species were matched and which were dropped. Intended as the bridge between the package's reconciliation cascade and any downstream comparative analysis: feed the result of `reconcile_data()` / `reconcile_tree()` (or any character vector of cleaned names) into `pr_get_tree()` and get back a phylo ready for `reconcile_apply()`.

Usage

```
pr_get_tree(
  x,
  source = c("rotl", "rtrees", "cloodl", "fishtree", "datelife", "auto"),
  species_col = NULL,
  taxon = NULL,
  n_tree = 1L,
  cache = FALSE,
  tnrs = c("auto", "always", "never"),
  min_match = 0.8,
  check_ultrametric = TRUE,
  resolve_polytomies = FALSE,
  branch_lengths = NULL,
  ...
)
```

Arguments

x One of:

- a reconciliation object** returned by `reconcile_tree()` or `reconcile_data()`; species are taken from the reconciled `name_y` column with NAs and unresolved entries dropped.
- a character vector** used directly after deduplication and NA removal.
- a data frame** `species_col` must name a character column; its unique non-NA values are used.

source A length-1 character vector. Which external backend to use. One of:

- "rotl" Open Tree of Life synthesis tree, via the CRAN package `rotl`. Universal taxonomic coverage; calls `tnrs_match_names()` to resolve names to OTT ids and then `tol_induced_subtree()`.
- "rtrees" Taxon-specific mega-trees (bird, mammal, fish, amphibian, reptile, plant, shark/ray, bee, butterfly) via the GitHub package `rtrees` (<https://daijiang.github.io/rtrees/>). Requires `taxon = "<group>"`. Calls `get_tree()`. Install with `pak::pak("daijiang/rtrees")` (GitHub-only). **Grafting behaviour:** when an input species is not in the chosen mega-tree, `rtrees::get_tree()` grafts it at the genus level (tip suffix `*`) or family level (`**`); if no co-family species is in the mega-tree, the species is dropped. The placement of every input species is reported per-row in `result$backend_meta$placement` (a tibble with columns `input_name`, `tree_name`, `placement_status` where `placement_status` is one of "exact", "genus_added", "family_added", "skipped", or "unmatched"). The grafting itself cannot be disabled at the wrapper level (`rtrees` 1.0.4 has no switch); to exclude grafted tips from a downstream analysis, filter the placement table on `placement_status == "exact"` and prune the tree to those tip labels. See `?rtrees::get_tree` for upstream control (scenario *where* a graft is placed, but not *whether*).
- "cloodl" Bird-only phylogenies in current Clements taxonomy, via the GitHub package `cloodl` (<https://github.com/eliotmiller/cloodl>). Calls `extractTree()`.

	Install with <code>pak::pak("eliotmiller/clootl")</code> .
	" <code>fishtree</code> " Fish-only time-calibrated phylogeny (Rabosky et al. 2018), via the CRAN package <code>fishtree</code> . Calls <code>fishtree_phylogeny()</code> (single tree) or <code>fishtree_complete_phylogeny()</code> (multi-tree posterior; triggered by <code>n_tree > 1</code>). Requires exact name matches against the Fish Tree of Life taxonomy — pre-clean with <code>reconcile_data()</code> (with a taxadb authority) for best results.
	" <code>datelife</code> " Universal database of pre-computed chronograms (Sanchez Reyes et al. 2024, <i>Syst. Biol.</i> 73:470), via the GitHub package <code>datelife</code> (https://github.com/phylotastic/datelife). Returns a single SDM-summary chronogram by default; with <code>n_tree > 1</code> , returns a <code>multiPhylo</code> of up to that many per-source candidate chronograms. Install before use with <code>pak::pak("phylotastic/datelife")</code> — the package is GitHub-only (archived from CRAN in 2024 with a heavy transitive dep tree <code>pak</code> can't auto-resolve), so prepR4pcm does NOT pull it in via <code>Suggests</code> .
	" <code>auto</code> " Fall-through dispatcher: try installed backends in priority order (<code>rtrees</code> if <code>taxon</code> provided, then <code>rotl</code> , <code>fishtree</code> , <code>clootl</code> , <code>datelife</code>), return the first result that resolves at least <code>min_match</code> of the species. Useful for first-pass exploration when you don't yet know which backend covers your taxa.
<code>species_col</code>	A length-1 character vector. Required when <code>x</code> is a data frame; ignored otherwise.
<code>taxon</code>	A length-1 character vector. Required when <code>source = "rtrees"</code> . One of "bird", "mammal", "fish", "amphibian", "reptile", "plant", "shark_ray", "bee", "butterfly" (see the <code>rtrees</code> package help for <code>get_tree</code>). Ignored for other backends.
<code>n_tree</code>	A length-1 positive integer. How many trees to request from the backend. Default 1L (single phylo for back-compat). Each backend negotiates this differently:
	" <code>rotl</code> " Always returns 1 (the synthesis tree). A one-shot warning is emitted if <code>n_tree > 1</code> .
	" <code>rtrees</code> " <code>n_tree</code> is informational only here. <code>rtrees::get_tree()</code> does not have an <code>n_tree</code> argument; the multi-tree count is fixed by which mega-tree was selected. Reference trees <code>rtrees</code> uses internally: birds = Jetz et al. 2012 (https://birdtree.org , 100 posterior trees); mammals = Upham et al. 2019 (VertLife, 100 by default; set <code>mammal_tree = "phylacine"</code> for the PHYLACINE set); amphibians + squamates = VertLife; fish = Rabosky et al. 2018 (also wrapped by <code>source = "fishtree"</code>); plants = V.PhyloMaker; bees = Bee Tree of Life. Override which mega-tree is used via <code>...</code> (e.g. <code>bee_tree = "bootstrap"</code> for 100 bee trees instead of the single ML tree). Requires <code>taxon</code> .
	" <code>clootl</code> " <code>n_tree = 1</code> calls <code>clootl::extractTree()</code> and works out of the box with the v1.6 / 2025 taxonomy bundled in the <code>clootl</code> package. <code>n_tree > 1</code> calls <code>clootl::sampleTrees(count = n_tree)</code> (capped at 100 upstream) and requires the AvesData repo to be set up once via <code>clootl::get_avesdata_repo(".")</code> first ; otherwise it errors with <code>AvesData repo not found</code> .
	" <code>fishtree</code> " Single phylo via <code>fishtree_phylogeny()</code> when <code>n_tree = 1</code> ; switches to <code>fishtree_complete_phylogeny()</code> returning a <code>multiPhylo</code> of stochastically polytomy-resolved trees when <code>n_tree > 1</code> .

	<p>"datelife" summary_format = "phylo_sdm" (single summary chronogram) when n_tree = 1; switches to summary_format = "phylo_all" (one chronogram per source, capped at n_tree) when n_tree > 1.</p> <p>When the request returns a multiPhylo, the result's tree slot is multiPhylo; otherwise phylo.</p>
cache	<p>Logical. Cache the result on disk and reuse it on subsequent identical calls? Default FALSE. When TRUE, the request is keyed by (species, source, n_tree, taxon, tnrs, ...) and stored at <code>pr_tree_cache_dir()</code>. See <code>pr_tree_cache_status()</code> and <code>pr_tree_cache_clear()</code> for inspecting / wiping the cache.</p>
tnrs	<p>A length-1 character vector. Run a TNRS preflight (Open Tree of Life name resolution via <code>rot1::tnrs_match_names</code>) on the species list before calling the backend? One of:</p> <p>"auto" (default) Run TNRS only for fishtree, where OTL-resolved names tend to improve the match rate. Not run for cloodl by default: cloodl uses the eBird / Clements taxonomy, so OTL-resolved names are often different from cloodl's preferred names; the network call is also the dominant cost for large requests (~15 min for 10k species before this change). Pass <code>tnrs = "always"</code> if you want it for cloodl anyway.</p> <p>"always" Run TNRS regardless of backend.</p> <p>"never" Skip TNRS even when the backend would benefit.</p> <p>When <code>rot1</code> is not installed, TNRS is silently skipped with a one-shot warning.</p>
min_match	<p>A length-1 numeric in $[0, 1]$. Only used when <code>source = "auto"</code>. The minimum fraction of input species a backend must resolve for the dispatcher to accept its result; if no backend meets the threshold, the best available is returned with a warning. Default 0.8.</p>
check_ultrametric	<p>Logical. After producing the tree, check that it's ultrametric (all tips equidistant from the root) and warn if not. Default TRUE. Only enforced for backends that normally return chronograms (<code>rtrees</code>, <code>cloodl</code>, <code>fishtree</code>, <code>datelife</code>); <code>rot1</code> returns a topology without real branch lengths, so the check is skipped. To force ultrametricity on a non-ultrametric result, use <code>phytools::force.ultrametric()</code> or <code>ape::chronos()</code> directly — <code>prepR4pcm</code> does not modify the tree silently.</p>
resolve_polytomies	<p>Logical. After retrieval, resolve any polytomies via <code>ape::multi2di()</code> with <code>random = TRUE</code>? Default FALSE (back-compat; topology preserved). Useful for phylogenetic meta-analysis, where a strictly bifurcating tree is required for <code>pr_phylo_cor()</code> / <code>ape::vcv()</code> to produce a full-rank correlation matrix.</p>
branch_lengths	<p>A length-1 character vector or NULL. After retrieval (and after polytomy resolution if requested), assign branch lengths via the named method? Default NULL (no transformation; backend's branch lengths are kept as-is). Other values:</p> <p>"grafen" Grafen's (1989) method via <code>ape::compute.br1en()</code> with <code>method = "Grafen"</code>. The canonical choice for phylogenetic meta-analysis when the topology comes from <code>rot1</code> (whose edge lengths are unit-length placeholders). See Cinar et al. (2022) <i>Methods Ecol. Evol.</i> 13:383, who use this exact pattern.</p>

"compute.br1en" Same as "grafen" — Grafen is `ape::compute.br1en()`'s default method. Provided as an alias for users who think in terms of the underlying function name.

"unit" Set every edge length to 1. The crudest option; useful only for sensitivity-analysis comparisons.

... Backend-specific arguments forwarded to the underlying call. See the help page of the underlying function in the relevant backend package (`tol_induced_subtree` in `rotl`, `extractTree` in `cloutl`, `get_tree` in `rTrees`, `fishTree_phylogeny` / `fishTree_complete_phylogeny` in `fishTree`, `dateLife_search` in `dateLife`) for the full list.

Details

Each backend is provided by an external R package that we list in `Suggests` rather than `Imports`, so installing **prepR4pcm** does not pull them in automatically. The error message tells you what to install if you ask for a backend you don't have.

Name handling. Input names are run through `pr_normalize_names()` before the backend is queried — underscores become spaces, leading/trailing whitespace is trimmed, OTT-id suffixes (e.g. `ott770315`) and authority strings (e.g. `(Linnaeus, 1758)`) are stripped, and hybrid signs are standardised. The matched and unmatched slots in the result use the *original* input format (as you typed it), not the normalised form.

When TNRS substitutes a name (only when `tnrs = "always"`, or for the `fishTree` backend under `tnrs = "auto"`), the replacement is recorded in `result$backend_meta$tnrs_replacements` as a named character vector (`original = resolved`). A one-shot cli warning lists the first few substitutions on the call itself.

TNRS also returns structured match metadata. `pr_get_tree()` records it per name in the mapping tibble: `tnrs_number_matches`, `tnrs_is_synonym`, `tnrs_approximate_match`, and `tnrs_flags`. When a name resolves to more than one taxon (`tnrs_number_matches > 1`, a homonym), a one-shot cli warning names the affected species, since the resolved name is then only one of several candidates.

Value

A list with class `pr_tree_result` and components:

- `tree` A phylo (single) or `multiPhylo` (posterior) object from the chosen backend, pruned to the matched species.
- `matched` Character vector of names from the user's **original input** (preserving the input format, including any underscores) that resolved to a tip in `tree`. The dispatcher enforces that matched names are a subset of `unique(input)` — TNRS substitution, normalisation, and backend-internal name juggling cannot leak intermediate names into this slot.
- `unmatched` Character vector of names from the **original input** that did not resolve. Disjoint from `matched`; `length(matched) + length(unmatched) == length(unique(input))` always holds. Inspect these and consider running them back through `reconcile_suggest()` / a manual override.

mapping A tibble with one row per unique input species. Core columns: `input_name`, `normalized_name`, `query_name`, `tree_name`, `in_tree`, `match_type`, and `placement_status`. This is the audit trail for name handling: `input_name` is what the user supplied, `normalized_name` is the result of `pr_normalize_names()`, `query_name` is the backend query after optional TNRS, `tree_name` is the actual returned tip label, and `match_type` is one of "exact", "normalized", "tnrs", or "unmatched". For `source = "rtrees"`, `placement_status` carries the grafting status from `backend_meta$placement`; otherwise it is NA. Four further columns record what `rotl`'s TNRS resolver reported for each name: `tnrs_number_matches`, `tnrs_is_synonym`, `tnrs_approximate_match`, and `tnrs_flags`. These are NA for backends or `tnrs` settings where TNRS did not run. `tnrs_number_matches > 1` flags a homonym, meaning the resolved name is only one of several candidate taxa.

source The backend that produced the tree.

backend_meta A named list of diagnostic information. Standard fields populated by the dispatcher:

`n_queried` Unique input species count.

`n_requested` The `n_tree` argument the user passed.

`n_returned` Number of trees in tree (1 for phylo).

`n_matched` Equal to `length(matched)`.

`tnrs_replacements` When TNRS ran (`tnrs = "always"`, or `tnrs = "auto"` for `fishtree`) and `rotl` is installed: a named character vector mapping original input to the TNRS-resolved name, for names that TNRS changed. NULL when no TNRS or no replacements occurred. A one-shot `cli` warning lists the first three substitutions on the call, so silent name correction is impossible.

`tip_set_consistent` Logical. For `multiPhylo` returns: TRUE if every tree shares the same tip set.

`dropped_per_tree` For `multiPhylo` returns where `tip_set_consistent = FALSE`: a list of character vectors, per tree, listing species missing from each tree relative to the union of all trees. NULL otherwise.

`tree_provenance` A list with one entry per returned tree (so `tree[[i]]` pairs with `backend_meta$tree_provenance[[i]]` when tree is a `multiPhylo`).

Backend-specific fields (e.g. `taxon`, `n_grafted`, `grafted_tips`, `placement` for `rtrees`; `backend`, `type`, `tnrs_table` for `fishtree` / `rotl`; `summary_format`, `source_citations`, `reference` for `datelife`) are merged in at the top level by the wrapper that called the backend. The `rtrees`-specific `placement` slot is a tibble with one row per unique input species and columns `input_name`, `tree_name`, `placement_status` ("exact", "genus_added", "family_added", "skipped", or "unmatched").

References

Backend reference trees:

Jetz, W., Thomas, G. H., Joy, J. B., Hartmann, K., & Mooers, A. O. (2012). The global diversity of birds in space and time. *Nature* 491: 444–448. doi:10.1038/nature11631 (Used by `rtrees` for `taxon = "bird"` and by `BirdTree`.)

Rabosky, D. L., Chang, J., Title, P. O., Cowman, P. F., Sallan, L., Friedman, M., Kaschner, K., Garilao, C., Near, T. J., Coll, M., & Alfaro, M. E. (2018). An inverse latitudinal gradient in speciation rate for marine fishes. *Nature* 559: 392–395. doi:10.1038/s4158601802731 (Fish Tree of Life; used by `source = "fishtree"` and by `rtrees` for `taxon = "fish"`.)

Upham, N. S., Esselstyn, J. A., & Jetz, W. (2019). Inferring the mammal tree: Species-level sets of phylogenies for questions in ecology, evolution, and conservation. *PLOS Biology* 17(12): e3000494. doi:10.1371/journal.pbio.3000494 (VertLife mammal posterior; used by rtrees for taxon = "mammal" with mammal_tree = "vertlife".)

Jin, Y. & Qian, H. (2019). VPhyloMaker: an R package that can generate very large phylogenies for vascular plants. *Ecography* 42(8): 1353–1359. doi:10.1111/ecog.04434 (Vascular-plant mega-tree used by rtrees for taxon = "plant"; also the basis for the source = "vphylomaker" augmentation backend in reconcile_augment().)

Sanchez Reyes, L. L., O’Meara, B. C., Brown, J. W., & McTavish, E. J. (2024). DateLife: Leveraging databases and analytical tools to reveal the dated Tree of Life. *Systematic Biology* 73(2): 470–485. doi:10.1093/sysbio/syae015 (Used by source = "datelife" and by pr_date_tree().)

Methodology:

Chang, J., Rabosky, D. L., & Alfaro, M. E. (2019). Estimating diversification rates on incompletely sampled phylogenies: Theoretical concerns and practical solutions. *Systematic Biology* 69(3): 602–611. doi:10.1093/sysbio/syz081 (Stochastic polytomy resolution behind fishtree_complete_phylogeny() for n_tree > 1.)

Michonneau, F., Brown, J. W., & Winter, D. J. (2016). rotl: an R package to interact with the Open Tree of Life data. *Methods in Ecology and Evolution* 7(12): 1476–1481. doi:10.1111/2041-210X.12593 (TNRS preflight and source = "rotl".)

See Also

[reconcile_tree\(\)](#) / [reconcile_data\(\)](#) for producing the reconciled species list that feeds this function; [reconcile_apply\(\)](#) for combining the returned phylo with the data frame ready for analysis; [reconcile_augment\(\)](#) for filling gaps in an existing tree (a tree-aware alternative to retrieving a fresh tree); [pr_date_tree\(\)](#) for time-calibrating an existing topology; [pr_cite_tree\(\)](#) for formatting citations for a tree result; [pr_tree_compare\(\)](#) for comparing two or more retrieved trees; [pr_get_tree_status\(\)](#) for checking which backends are installed and reachable; [pr_tree_cache_dir\(\)](#) / [pr_tree_cache_status\(\)](#) / [pr_tree_cache_clear\(\)](#) for managing the on-disk cache. The companion package [pigauto](#) consumes a multiPhylo directly via [multi_impute_trees\(\)](#) for posterior- tree PCMs — request a posterior sample with n_tree > 1.

Examples

```
if (interactive()) {
  # Example 1: birds via clootl (Clements taxonomy). Uses the
  # bundled AVONET subset (657 species placed in the Clements tree).
  data(avonet_subset)
  if (requireNamespace("clootl", quietly = TRUE)) {
    res <- pr_get_tree(avonet_subset, species_col = "Species1",
                      source = "clootl")
    ape::Ntip(res$tree)      # species placed in the tree
    head(res$unmatched)     # names clootl could not resolve
  }

  # Example 2: fish via fishtree (Rabosky et al. 2018, time-calibrated)
  if (requireNamespace("fishtree", quietly = TRUE)) {
    res <- pr_get_tree(c("Salmo salar", "Esox lucius", "Gadus morhua"),
                      source = "fishtree")
  }
}
```

```

    res$tree
  }

  # Example 3: anything via rotl (universal, network)
  if (requireNamespace("rotl", quietly = TRUE)) {
    res <- pr_get_tree(c("Homo sapiens", "Pan troglodytes",
                        "Mus musculus"),
                      source = "rotl")

    res$tree
  }

  # Example 4: posterior of fish trees (50 trees, for multi-tree PCMs)
  if (requireNamespace("fishtree", quietly = TRUE)) {
    res <- pr_get_tree(c("Salmo salar", "Esox lucius"),
                      source = "fishtree", n_tree = 50)
    class(res$tree)      # "multiPhylo"
  }
}

```

pr_get_tree_status *Report the install status of every pr_get_tree() backend*

Description

Walks every backend supported by `pr_get_tree()` and reports whether the underlying package is installed (and at what version), whether it requires network, and what to do if it's missing. Useful for first-time users figuring out which backends are available, and for CI sanity checks.

Usage

```
pr_get_tree_status(check_network = FALSE)
```

Arguments

`check_network` Logical. Should the probe attempt a tiny network call to test that backends needing the network are actually reachable? Default FALSE (purely local check, no side effects). Set TRUE to also test reachability — adds 1-3 seconds and requires internet.

Value

A data.frame with one row per backend and columns:

`source` Backend name, as passed to `pr_get_tree()`.

`installed` Logical — is the package available?

`version` Character — installed version, or NA.

`needs_network` Logical — does the backend hit a remote server at runtime?

reachable Logical or NA — result of the network check (only populated when check_network = TRUE).

install_hint Character — the install command to run when installed = FALSE.

source_repo Character — "CRAN" or a GitHub repo for non-CRAN backends.

See Also

[pr_get_tree\(\)](#) / [pr_date_tree\(\)](#) for the consumers.

Examples

```
# Local-only probe (fast, no network)
pr_get_tree_status()

# Also test reachability of remote backends
pr_get_tree_status(check_network = TRUE)
```

pr_normalize_names *Normalise scientific names to a canonical form*

Description

Apply a sequence of deterministic text transformations so that scientific names which differ only in formatting compare equal. This is the same routine used by stage 2 of the matching cascade in [reconcile_data\(\)](#) and [reconcile_tree\(\)](#). Use it directly when you want to clean a column of names without running a full reconciliation — for example, when building a crosswalk by hand.

Usage

```
pr_normalize_names(
  names,
  rank = c("species", "subspecies"),
  parser = c("internal", "gnparser")
)
```

Arguments

names	A character vector of scientific names (any length; each element is a single name). NA values are preserved as NA.
rank	A length-1 character vector. Taxonomic rank to normalise to: "species" (default) Strip infraspecific epithets so trinomials become binomials (Parus major major -> Parus major). "subspecies" Keep trinomials intact.
parser	A length-1 character vector. Which parsing engine to use:

"internal" (**default**) The package's own regex-based cascade described above. No external dependency.

"gnparser" Delegates parsing to `rgnparser::gn_parse_tidy()`, which wraps the `gnparser` Go binary (part of the Global Names Architecture). Handles hybrid signs, complex multi-author year strings, and trailing parentheticals (Open Tree homonym / rank flags) more robustly than the internal cascade. Requires both the `rgnparser` R package and the `gnparser` binary on the system PATH; the function errors helpfully if either is missing. Returns the same shape and `normalisation_log` attribute as the internal path, so the two are drop-in interchangeable.

Details

The transformations, applied in order, are:

1. Replace underscores and multiple whitespace with a single space (Homo_sapiens -> Homo sapiens).
2. Strip authority strings and year, including multi-author and parenthetical forms (Corvus corax (Linnaeus, 1758) -> Corvus corax).
3. Strip any other trailing parenthetical qualifier, such as the Open Tree of Life homonym / rank flags that `rot1` returns (Prunella (genus in kingdom Archaeplastida) -> Prunella).
4. Fold diacritics to ASCII (Passer domesticus stays as Passer domesticus; accented characters are simplified).
5. Standardise case: genus capitalised, epithet lowercase.
6. Strip infraspecific epithets if rank = "species".
7. Trim whitespace and collapse leftover empty tokens.

Value

A character vector of normalised names, the same length as names, with an attribute "normalisation_log" — a tibble recording every non-trivial change, for auditing.

Note

On the spelling: the title and prose use British English *normalise*, consistent with the package's `Language: en-GB` declaration. The function identifier `pr_normalize_names()` keeps the American-English *z* because R-package function names conventionally use ASCII identifiers in the form most R users expect. The two spellings are equivalent and intentional.

See Also

[reconcile_data\(\)](#) and [reconcile_tree\(\)](#) for the full four-stage matching cascade; [pr_extract_tips\(\)](#) for pulling tip labels out of a tree prior to normalising them.

Other name utilities: [pr_extract_tips\(\)](#)

Examples

```
pr_normalize_names(c("Homo_sapiens",
                    "homo sapiens",
                    "Parus major major",
                    "Corvus corax (Linnaeus, 1758)"))

# Keep trinomials
pr_normalize_names("Parus major major", rank = "subspecies")
```

pr_phylo_cor

*Phylogenetic correlation matrix from a tree***Description**

Convert a phylogeny into the correlation matrix used as a random- effect structure in phylogenetic meta-analysis (`metafor::rma.mv`) or phylogenetic mixed models (`MCMCglmm`, `brms`, etc.).

Usage

```
pr_phylo_cor(x, corr = TRUE, ...)
```

Arguments

x	A phylo object, a <code>multiPhylo</code> , or a <code>pr_tree_result</code> (the <code>\$tree</code> slot is extracted). For <code>multiPhylo</code> input, returns a list of correlation matrices.
corr	Logical. Pass through to <code>ape::vcv()</code> . TRUE (default) returns a correlation matrix (diagonal = 1); FALSE returns the variance-covariance matrix.
...	Additional arguments forwarded to <code>ape::vcv()</code> .

Details

Wraps `ape::vcv()` with `corr = TRUE`. Designed to slot in after `pr_get_tree()` when the goal is meta-analysis, where typically:

1. Topology comes from Open Tree of Life (`source = "rot1"`) because the species span many higher taxa.
2. Polytomies are resolved at random (`resolve_polytomies = TRUE`).
3. Branch lengths are computed via Grafen's method (`branch_lengths = "grafen"`) because `rot1`'s edge lengths are unit-length placeholders.
4. The correlation matrix is computed once and reused as `random = ~1 | species's R = list(species = phy_cor)` in `metafor::rma.mv()` (or `random = ~species` with `cov.formula = ~ phylo` in `MCMCglmm`).

The correlation matrix has the property that, for a Brownian-motion model on a tree with branch lengths in time units, two species' off-diagonal entry equals the time from root to their MRCA divided by the time from root to tip. So an ultrametric tree always has diagonal = 1 (every tip is the same distance from the root).

For meta-analysis with rotl topology + Grafen's method, the resulting matrix is the standard Pagel's lambda = 1 phylogenetic correlation that metafor::rma.mv() accepts directly.

Value

A square symmetric matrix with row/column names equal to the tip labels. For multiPhylo input, a list of such matrices.

References

Paradis, E., & Schliep, K. (2019). ape 5.0: an environment for modern phylogenetics and evolutionary analyses in R. *Bioinformatics*, 35(3), 526–528. doi:10.1093/bioinformatics/bty633

Cinar, O., Nakagawa, S., & Viechtbauer, W. (2022). Phylogenetic multilevel meta-analysis: a simulation study on the importance of modelling the phylogeny. *Methods in Ecology and Evolution*, 13(2), 383–395. doi:10.1111/2041210X.13760

See Also

`pr_get_tree()` (use with `branch_lengths = "grafen"` and `resolve_polytomies = TRUE` for the meta-analysis path); `ape::vcv()` for the underlying computation.

Examples

```
set.seed(1)
tr <- ape::rcoal(5)           # ultrametric, bifurcating
phy_cor <- pr_phylo_cor(tr)
dim(phy_cor)
all(diag(phy_cor) == 1)

# End-to-end meta-analysis prep
if (requireNamespace("rotl", quietly = TRUE)) {
  res <- try(pr_get_tree(c("Homo sapiens", "Pan troglodytes",
                          "Mus musculus", "Rattus norvegicus"),
                      source = "rotl",
                      resolve_polytomies = TRUE,
                      branch_lengths = "grafen"),
            silent = TRUE)
  if (!inherits(res, "try-error")) {
    phy_cor <- pr_phylo_cor(res)
    # phy_cor can now be supplied to downstream meta-analysis models.
  }
}
```

pr_tree_cache_clear *Clear the local tree-retrieval cache*

Description

Removes all cached pr_get_tree() / pr_date_tree() results. By default asks for confirmation before deleting; pass confirm = FALSE to skip the prompt (useful in scripts).

Usage

```
pr_tree_cache_clear(confirm = TRUE, source = NULL)
```

Arguments

confirm	Logical. Ask interactively before deleting? Default TRUE. Ignored in non-interactive sessions (deletion proceeds).
source	A length-1 character vector or NULL. If non-NULL, only entries from that backend are cleared (e.g. "datelife" to wipe only datelife cache after a database refresh). If NULL (default), all entries are cleared.

Value

Invisibly, the number of files removed.

See Also

[pr_tree_cache_dir\(\)](#) / [pr_tree_cache_status\(\)](#).

Examples

```
# Demo against a throwaway cache so the user's real cache is untouched
old_opt <- getOption("prepR4pcm.cache_dir")
tmp_cache <- file.path(tempdir(), "prepR4pcm-cache-demo")
pr_tree_cache_dir(tmp_cache)

# Drop two dummy entries so there is something to clear:
dir.create(file.path(tmp_cache, "fishtree"), showWarnings = FALSE)
dir.create(file.path(tmp_cache, "rot1"),      showWarnings = FALSE)
saveRDS(NULL, file.path(tmp_cache, "fishtree", "abc.rds"))
saveRDS(NULL, file.path(tmp_cache, "rot1",    "def.rds"))

pr_tree_cache_status()           # 2 entries
pr_tree_cache_clear(confirm = FALSE) # removes both
pr_tree_cache_status()           # empty

# Restore the previous cache directory
options(prepR4pcm.cache_dir = old_opt)
```

pr_tree_cache_dir *Get or set the local tree-retrieval cache directory*

Description

Returns the path to the cache directory used by `pr_get_tree()` and `pr_date_tree()` when called with `cache = TRUE`. Pass a path to override the default.

Usage

```
pr_tree_cache_dir(path = NULL)
```

Arguments

`path` A length-1 character vector or NULL. If non-NULL, sets the cache directory to `path` (creating it if it doesn't exist). If NULL (default), returns the currently configured directory.

Details

The default cache directory is `tools::R_user_dir()` with type "cache" and the package name "prepR4pcm", which on Linux is typically `~/ .cache/R/ prepR4pcm/`, on macOS `~/Library/Caches/org.R-project.R/R/` and on Windows something under `%LOCALAPPDATA%\R\cache\R\prepR4pcm\`.

To use a cache directory you control, pass its path explicitly with `pr_tree_cache_dir(path)`.

Value

A length-1 character vector — the absolute path of the cache directory.

See Also

[pr_tree_cache_status\(\)](#) / [pr_tree_cache_clear\(\)](#); [pr_get_tree\(\)](#) for the consumer.

Examples

```
# Default location
pr_tree_cache_dir()

old_cache <- getOption("prepR4pcm.cache_dir", NULL)
tmp_cache <- tempfile("prepR4pcm-cache-")
pr_tree_cache_dir(tmp_cache)
options(prepR4pcm.cache_dir = old_cache)
unlink(tmp_cache, recursive = TRUE)
```

pr_tree_cache_status *Show the contents of the local tree-retrieval cache*

Description

Lists every cache entry by source, with file size and modification timestamp. Useful for figuring out where the disk space went or for confirming a fresh run hit the cache.

Usage

```
pr_tree_cache_status()
```

Value

A data.frame (sorted by most recent first) with columns source, hash, size_kb, modified. Returns an empty data frame with the same columns when the cache is empty.

See Also

[pr_tree_cache_dir\(\)](#) / [pr_tree_cache_clear\(\)](#).

Examples

```
pr_tree_cache_status()
```

pr_tree_compare *Compare two or more phylogenetic trees*

Description

Computes a small set of standard metrics for comparing trees that come from different backends (or different runs of the same backend). Designed for the common case of "I retrieved a tree from rotl and another from fishtree — do they agree?"

Usage

```
pr_tree_compare(..., prune_to_common = TRUE)
```

Arguments

... Two or more phylo objects, or two or more pr_tree_result objects (the tree slot is extracted), or multiPhylo objects (the first tree is used). Trees can be passed as positional arguments or as a named list.

prune_to_common

Logical. Restrict each tree to the shared tip set before computing topology metrics? Default TRUE — without this, RF distance is undefined when tip sets differ.

Details

RF distance is computed via `ape::dist.topo()` with the default method. Branch-length correlation matches edges by their tip-set bipartition: for each edge in tree A, the corresponding edge in tree B (if any) is the one that splits the same set of tips. The Pearson correlation is taken over the matched edge-length pairs; edges whose bipartition is absent in the other tree are dropped. This is a proper bipartition-matched correlation as introduced in Kuhner & Felsenstein (1994) for tree comparison.

Value

A list with class `pr_tree_compare` and components:

`n_trees` Number of input trees.

`tip_sets` Named list of character vectors, one per tree.

`shared_tips` Tips present in every input tree.

`unique_to` Named list, one per tree, of tips present in that tree but not in every other tree.

`n_shared` Length-1 integer.

`pairwise_jaccard` Square matrix; (i, j) is the Jaccard index of `tip_sets[[i]]` vs `tip_sets[[j]]`.

`pairwise_rf` Square matrix of Robinson-Foulds distances between pairs of trees pruned to `shared_tips`.
NA when the pair has < 4 shared tips.

`pairwise_branch_cor` Square matrix of Pearson correlations between matching edge lengths in each pair, or NA when one or both trees have no branch lengths.

References

Kuhner, M. K., & Felsenstein, J. (1994). A simulation comparison of phylogeny algorithms under equal and unequal evolutionary rates. *Molecular Biology and Evolution* 11(3): 459–468. [doi:10.1093/oxfordjournals.molbev.a040126](https://doi.org/10.1093/oxfordjournals.molbev.a040126)

Robinson, D. F., & Foulds, L. R. (1981). Comparison of phylogenetic trees. *Mathematical Biosciences* 53(1–2): 131–147. [doi:10.1016/00255564\(81\)900432](https://doi.org/10.1016/00255564(81)900432)

See Also

[pr_get_tree\(\)](#) for retrieval; [reconcile_apply\(\)](#) for combining a chosen tree with a dataset.

Examples

```
# Two trees with identical tip sets
set.seed(1)
t1 <- ape::rtree(10)
t2 <- ape::rtree(10, tip.label = t1$tip.label)
cmp <- pr_tree_compare(t1, t2)
cmp$n_shared
cmp$pairwise_rf

# Two trees with overlapping but not identical tips
t3 <- ape::rtree(8, tip.label = t1$tip.label[1:8])
cmp <- pr_tree_compare(t1, t3)
```

```
cmp$pairwise_jaccard
```

```
reconcile_apply      Apply a reconciliation to produce an aligned data-tree pair
```

Description

Turn a [reconciliation](#) object into an analysis-ready data frame and pruned phylogenetic tree whose species labels agree. This is the step that feeds directly into `caper::pgls()`, `MCMCglmm::MCMCglmm()`, `phytools::fastAnc()`, or any other PCM that expects matching names in data and tree.

Usage

```
reconcile_apply(
  reconciliation,
  data = NULL,
  tree = NULL,
  species_col = NULL,
  drop_unresolved = FALSE
)
```

Arguments

reconciliation A [reconciliation](#) object returned by `reconcile_tree()`, `reconcile_data()`, or a related matcher.

data A data frame to align. If NULL, only the tree is processed and the returned data slot is NULL.

tree An `ape::phylo` object (or path to a Newick / Nexus file) to align. If NULL, only the data frame is processed and the returned tree slot is NULL. (Passing both `data = NULL` and `tree = NULL` is allowed but produces an empty result; the normal use is to pass at least one of them.)

species_col A length-1 character vector. Column in data containing species names. Auto-detected from a small set of common heuristics (e.g. `species`, `Species1`, `scientific_name`) when NULL; the heuristics list is not exhaustive — pass the column name explicitly if your data uses a non-standard label.

drop_unresolved Logical. Drops unmatched rows and tips when TRUE. Defaults to FALSE (keep everything and just warn). Set to TRUE when preparing data for an analysis that cannot tolerate mismatches.

Details

Rows in data whose species have no match in the tree (and tips in tree whose species have no match in the data) are handled according to `drop_unresolved`. Matched data rows are kept as-is. Matched tree tips are renamed to the source-x (data-side) name when the tree-side label differs, so downstream PCM software can look up tips by the species names in your data frame.

Value

A list with two elements:

data The aligned data frame (or NULL if data was not supplied).

tree The aligned phylo object (or NULL if tree was not supplied).

See Also

[reconcile_tree\(\)](#) to build the reconciliation; [reconcile_merge\(\)](#) when you want a single merged data frame instead of aligned data + tree; [reconcile_export\(\)](#) to write everything to disk.

Other reconciliation functions: [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jet2)
rec <- reconcile_tree(avonet_subset, tree_jet2,
                    x_species = "Species1", authority = NULL)

aligned <- reconcile_apply(rec,
                          data = avonet_subset,
                          tree = tree_jet2,
                          species_col = "Species1",
                          drop_unresolved = TRUE)

nrow(aligned$data)
ape::Ntip(aligned$tree)

# aligned$data and aligned$tree are ready for downstream PCM tools
```

reconcile_augment *Graft missing species onto a phylogenetic tree (genus-level placement)*

Description

When a reconciliation identifies species that are present in your data but missing from the tree, `reconcile_augment()` attaches each missing species as sister to a congener — i.e., a species in the same genus already present in the tree. The result is a tree that contains every species in your dataset, at the cost of making a strong assumption about where the new tips sit.

Usage

```

reconcile_augment(
  reconciliation,
  tree,
  where = c("genus", "near"),
  branch_length = c("congener_median", "half_terminal", "zero"),
  seed = NULL,
  quiet = FALSE,
  source = c("internal", "rtrees", "vphylomaker", "uphyloaker"),
  taxon = NULL,
  check_ultrametric = TRUE,
  ...
)

```

Arguments

- reconciliation** A [reconciliation](#) object, typically from [reconcile_tree\(\)](#).
- tree** An `ape::phylo` object. Must be the same tree used to build reconciliation (or a tree with the same tip set). For `source = "rtrees"`, this is passed to `rtrees` as the user-supplied backbone (`tree_by_user = TRUE`).
- where** A length-1 character vector. Where to attach each new tip (only used when `source = "internal"`; ignored otherwise):
- `"genus" (default)` Attach as sister to a single congener chosen at random from the genus. Recommended when the genus has only one or two representatives in the tree, or when you want variation across runs for sensitivity analyses.
 - `"near"` Attach at the most recent common ancestor (MRCA) of all congeners in the tree. Better when the genus is well-represented, because the new tip is not arbitrarily tied to one sister taxon.
- branch_length** A length-1 character vector. How to set the terminal branch length of each newly added tip (only used when `source = "internal"`; ignored otherwise — `rtrees` sets its own branch lengths):
- `"congener_median" (default)` Median terminal branch length of the species' congeners. Uses the average "how long since this group diverged" for the genus. Recommended for time-calibrated trees because it preserves approximate branch-length scale.
 - `"half_terminal"` Half the sister tip's terminal branch. A conservative alternative that places the new tip as a recent split from its sister. Useful when the genus is sparsely sampled and the median is unreliable.
 - `"zero"` Zero-length branch, producing a polytomy with the sister taxon (or MRCA). Use for exploratory sensitivity checks where you want to see the effect of adding species without assuming any divergence time.
- When the input tree is ultrametric, each grafted tip's terminal edge is adjusted after placement so the augmented tree stays ultrametric — a requirement of phylogenetic comparative methods. `branch_length` then governs the initial graft only; `"zero"` is exempt, since it asks for a polytomy by construction.

seed	A length-1 integer or NULL. When non-NULL and source = "internal", a fixed seed for the random congener choice when where = "genus", making the call reproducible. When NULL (default), the session's current RNG state is used so results vary across runs — useful for sensitivity analyses that explore the variation introduced by the random choice. Set to a fixed integer in real analyses so results are reproducible. The seed is scoped to this call: the session RNG state is saved before and restored after, so subsequent random draws in your script are unaffected. Default NULL. (For source = "rtrees", set the seed in your script before calling reconcile_augment(); rtrees does not accept a seed argument.)
quiet	Logical. Suppress progress messages? Default FALSE.
source	A length-1 character vector. Which grafting backend to use. One of "internal" (default), "rtrees", or "vphylomaker". See "Choosing a source".
taxon	A length-1 character vector. Required when source = "rtrees". One of "bird", "mammal", "fish", "amphibian", "reptile", "plant", "shark_ray", "bee", "butterfly". Ignored for "internal" and "vphylomaker".
check_ultrametric	Logical. After grafting, check that the result is ultrametric and warn if not. Default TRUE. The "rtrees", "vphylomaker", and "uphyloMaker" backends produce ultrametric trees by design; the "internal" backend does too when the input tree was ultrametric and branch_length is "congener_median" or "half_terminal", but not when branch_length = "zero" (which produces zero-length tip edges that break ultrametricity by construction).
...	Additional arguments forwarded to the chosen backend: rtrees::get_tree() for source = "rtrees" (e.g. scenario, n_tree); V.Phylomaker2::phylo.maker() for source = "vphylomaker" (e.g. scenarios = "S3", nodes.type); U.Phylomaker::phylo.maker() for source = "uphyloMaker" (e.g. gen.list, scenario). Ignored when source = "internal".

Value

A list with:

tree The augmented phylo object (or multiPhylo when source = "rtrees" returns a posterior sample).

original The original (unmodified) phylo object, for easy comparison.

augmented A tibble documenting each added species: species, genus, placed_near (sister tip / MRCA node / rtrees placement note), branch_length, method, n_congeners. For source = "rtrees", branch_length and n_congeners are NA because the backend chooses them.

skipped A tibble of species that could not be placed, with the reason (e.g. "No congener in tree", "rtrees did not place this species").

meta Provenance metadata: source, placement strategy, branch length rule, counts; for source = "rtrees" includes a backend_meta sub-list with the taxon and the number of grafted tips.

When to use this

Tip-grafting is an *exploratory* convenience, not a substitute for a properly inferred phylogeny. Both source modes (see below) make strong placement assumptions that are often wrong in detail. Use it to keep exploratory PCMs running while you decide how to handle orphan species, and always:

1. Report exactly which species were augmented (see `$augmented` in the return value).
2. Run sensitivity analyses with and without the augmented tips.
3. Prefer a published imputed phylogeny (e.g. the PhyloMaker or TACT approaches) when grafting many species.

Choosing a source

"internal" (**default**) Genus-level placement using only your tree (no external dependencies). Each missing species is attached as sister to a congener (or at the congeneric MRCA). Fast and reproducible, but only works when the genus is already represented in the tree, and assumes the new tip diverged in roughly the same way as its congeners.

"rtrees" Delegates the grafting to the `rtrees` mega-tree machinery via `rtrees::get_tree(tree_by_user = TRUE)`. Uses your tree as the backbone and lets `rtrees` place each missing species using genus / family information from a taxon-specific reference tree. Requires `taxon` and the GitHub-only `rtrees` package (<https://daijiang.github.io/rtrees/>). Helpful when the genus is absent from your tree but present in `rtrees`' reference — which the internal mode would skip.

"vphylomaker" Plant-only alternative to "rtrees" via either of the GitHub packages **V.PhyloMaker2** (<https://github.com/jinyizju/V.PhyloMaker2>, preferred when installed; updated and enlarged version) or **V.PhyloMaker** (<https://github.com/jinyizju/V.PhyloMaker>, used as a fallback; original 2019 version). Calls `phylo.maker(sp.list, tree, scenarios = ...)` with your tree as the backbone. Use this when you want explicit control over the V.PhyloMaker placement scenario ("S1", "S2", or "S3" — see Jin & Qian 2019/2022); otherwise "rtrees" with `taxon = "plant"` is simpler.

"uphylomaker" Universal (plants + animals) variant of V.PhyloMaker, via the GitHub package **U.PhyloMaker** (<https://github.com/jinyizju/U.PhyloMaker>). Same `phylo.maker` convention but takes a `gen.list` (a genus-family lookup) so it can graft non-plant taxa as well as plants. Use this when your tree spans multiple kingdoms and you want the V.PhyloMaker placement strategy.

Use `pr_get_tree()` when you have only a species list and need a candidate tree from scratch (`rotl`, `clootl`, or `rtrees`). Use `reconcile_augment()` when you already have a tree and want to fill the gaps.

References

Paradis, E. & Schliep, K. (2019). *ape* 5.0: an environment for modern phylogenetics and evolutionary analyses in R. *Bioinformatics* 35: 526–528. doi:10.1093/bioinformatics/bty633

Augmentation backends:

Jin, Y. & Qian, H. (2019). V.PhyloMaker: an R package that can generate very large phylogenies for vascular plants. *Ecography* 42(8): 1353–1359. doi:10.1111/ecog.04434 (source = "vphylomaker", fallback path.)

Jin, Y. & Qian, H. (2022). V.PhyloMaker2: an updated and enlarged R package that can generate very large phylogenies for vascular plants. *Plant Diversity* 44(4): 335–339. doi:10.1016/j.pld.2022.05.005 (source = "vphyloMaker", preferred path.)

Jin, Y. & Qian, H. (2023). U.PhyloMaker: an R package that can generate large phylogenetic trees for plants and animals. *Plant Diversity* 45(3): 347–352. doi:10.1016/j.pld.2022.12.007 (source = "uphyloMaker".)

See Also

`reconcile_tree()` for the reconciliation step; `reconcile_apply()` for the non-augmenting alternative (prune data and tree to the intersection); `pr_get_tree()` for retrieving a candidate tree from external resources when you don't have a tree yet; `pr_date_tree()` for time-calibrating an existing topology; `pr_cite_tree()` for formatting tree provenance citations. The companion package `pigauto` consumes the resulting tree (or multiPhylo) directly via `multi_impute_trees()` for posterior-tree PCMs.

Other reconciliation functions: `reconcile_apply()`, `reconcile_crosswalk()`, `reconcile_data()`, `reconcile_diff()`, `reconcile_export()`, `reconcile_mapping()`, `reconcile_merge()`, `reconcile_multi()`, `reconcile_override()`, `reconcile_override_batch()`, `reconcile_plot()`, `reconcile_report()`, `reconcile_review()`, `reconcile_splits_lumps()`, `reconcile_suggest()`, `reconcile_summary()`, `reconcile_to_trees()`, `reconcile_tree()`, `reconcile_trees()`

Examples

```
# --- Example 1: genus-level placement with congener_median branch lengths ---
x <- data.frame(species = c("A a", "A missing", "B c", "C absent"))
tree <- ape::read.tree(text = "((A_a:1,A_b:1):1,B_c:2);")
result <- reconcile_tree(x, tree, x_species = "species",
                        authority = NULL, quiet = TRUE)

aug <- reconcile_augment(result, tree, seed = 42, quiet = TRUE)

# Compare original vs augmented tree
cat("Original tips:", ape::Ntip(tree), "\n")
cat("Augmented tips:", ape::Ntip(aug$tree), "\n")
cat("Added:", nrow(aug$augmented), "| Skipped:", nrow(aug$skipped), "\n")

# Inspect which species were added and where they were placed
head(aug$augmented[, c("species", "genus", "placed_near",
                      "branch_length", "n_congeners")])

# Species skipped (no congener in tree)
head(aug$skipped)

# --- Example 2: MRCA placement with zero-length branches ---
aug_near <- reconcile_augment(result, tree,
                             where = "near",
                             branch_length = "zero",
                             seed = 42, quiet = TRUE)

cat("\nMRCA placement (zero branches):\n")
cat("  Added:", nrow(aug_near$augmented), "\n")
```

```

# Compare: MRCA placement shows genus-level context
head(aug_near$augmented[, c("species", "placed_near", "method")])

# --- Example 3: delegate grafting to rtrees ---
# Useful when the genus is missing from your tree but present in
# the rtrees taxon-specific reference tree.
if (requireNamespace("rtrees", quietly = TRUE)) {
  aug_rt <- try(
    reconcile_augment(result, tree,
                      source = "rtrees",
                      taxon = "bird",
                      quiet = TRUE),
    silent = TRUE
  )
  if (!inherits(aug_rt, "try-error")) {
    nrow(aug_rt$augmented) # how many were placed
    aug_rt$meta$backend_meta$n_grafted # how many at higher rank
  }
}

```

reconcile_crosswalk *Convert a published taxonomy crosswalk into an overrides table*

Description

Turn a curated species-name crosswalk (e.g. the BirdLife–BirdTree crosswalk bundled as [crosswalk_birdlife_birdtree](#), or Clements updates released each year) into a data frame that can be passed straight to the overrides argument of [reconcile_tree\(\)](#), [reconcile_data\(\)](#) and friends.

Usage

```

reconcile_crosswalk(
  crosswalk,
  from_col,
  to_col,
  match_type_col = NULL,
  notes_col = NULL,
  one_to_one_only = FALSE
)

```

Arguments

crosswalk A data frame, or a file path. File format is inferred from the extension: `.csv` (comma-separated), `.tsv` (tab-separated), or `.txt` (tab-separated). For other delimited formats, read the file yourself with `read.delim()` or `read.table()` and pass the resulting data frame.

from_col	A length-1 character vector. Column name for source names (e.g., "Species1" for BirdLife names).
to_col	A length-1 character vector. Column name for target names (e.g., "Species3" for BirdTree names).
match_type_col	A length-1 character vector or NULL. Name of an optional column in crosswalk that classifies each row's relationship between the two taxonomies — e.g. "1BL to 1BT" (one BirdLife species mapped to one BirdTree species; a clean one-to-one match), "Many BL to 1BT" (a lump: several BirdLife species mapped to a single BirdTree species), "1BL to many BT" (a split). When supplied, the contents of this column are appended to each override's user_note so the audit trail records the relationship; if you also pass one_to_one_only = TRUE, only the rows whose match type starts "1 . . . to 1 . . ." are kept. Pass NULL (default) when your crosswalk has no such classification column — every row is then kept and notes carry no provenance label.
notes_col	A length-1 character vector or NULL. Column containing additional notes.
one_to_one_only	Logical. If TRUE, keeps only one-to-one matches (e.g., "1BL to 1BT"). Default FALSE.

Details

Using a crosswalk is preferable to automated synonym resolution when an authoritative mapping exists — it is reproducible, does not depend on **taxadb** being available, and you can point to the published source in the methods section of your paper.

Value

A data frame with columns name_x, name_y, and user_note, ready to be passed as the overrides argument.

See Also

[reconcile_override_batch\(\)](#) for applying this table directly to an existing reconciliation; [crosswalk_birdlife_birdtree](#) for the bundled example.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(crosswalk_birdlife_birdtree)
overrides <- reconcile_crosswalk(
  crosswalk_birdlife_birdtree,
  from_col = "Species1",
  to_col = "Species3",
  match_type_col = "Match.type"
)
```

```
head(overrides)
```

```
reconcile_data      Reconcile species names between two datasets
```

Description

Match the species column of one data frame (x) to the species column of another (y), returning a [reconciliation](#) object that records how every name was resolved. Use this when combining trait datasets, range datasets, or any other species-level tables that may use slightly different taxonomies or spellings.

Usage

```
reconcile_data(
  x,
  y,
  x_species = NULL,
  y_species = NULL,
  authority = "col",
  rank = c("species", "subspecies"),
  overrides = NULL,
  db_version = NULL,
  fuzzy = FALSE,
  fuzzy_threshold = 0.9,
  flag_threshold = 0.95,
  resolve = c("flag", "first"),
  quiet = FALSE,
  x_label = NULL,
  y_label = NULL
)
```

Arguments

x	A data frame whose species will be matched <i>from</i> .
y	A data frame whose species will be matched <i>to</i> (typically the "reference" taxonomy or the dataset you want to merge with).
x_species	A length-1 character vector. Name of the column in x containing scientific names. Auto-detected (e.g. species, Species1, scientific_name) when NULL.
y_species	A length-1 character vector. Name of the column in y containing scientific names. Auto-detected when NULL.
authority	A length-1 character vector, or NULL. Taxonomic authority used for synonym resolution (stage 3 of the cascade). One of:

	<p>"col" (default) Catalogue of Life — broad, curated, frequently updated. A sensible default for most taxa.</p> <p>"itis" Integrated Taxonomic Information System — strong for North American vertebrates and plants.</p> <p>"gbif" Global Biodiversity Information Facility backbone. Wider coverage; includes more recent synonymy.</p> <p>"ncbi" NCBI Taxonomy — best when working with sequence data.</p> <p>"ott" Open Tree of Life synthetic taxonomy. Useful when your downstream phylogeny is from the Open Tree synthesis.</p> <p>"itis_test" A small bundled subset of ITIS, cached locally with taxadb for testing. Intended for examples and unit tests; not for analysis.</p> <p>"gnverifier" HTTP-backed verification against ~100 sources via the Global Names verifier; no local database download. See vignette("getting-started") for the trade-off (wider coverage, requires network and the httr2 package).</p> <p>NULL Skip the synonym stage entirely. Useful for quick checks or when taxadb is unavailable. Stages 1, 2 and 4 still run.</p> <p>Five authority codes that earlier versions of the package advertised — "iucn", "tpl", "fb", "slb", "wd" — are no longer accepted. Empirical testing against taxadb v22.12 showed that iucn errors with a schema mismatch and the others are not taxadb providers at all. Passing one of those values now produces a helpful migration error.</p>
rank	<p>A length-1 character vector. Controls how trinomials are handled during normalisation:</p> <p>"species" (default) Strip infraspecific epithets so that "Parus major major" becomes "Parus major" before matching.</p> <p>"subspecies" Keep trinomials intact. Use this when your analysis operates at subspecies level.</p>
overrides	<p>Optional pre-built corrections. Either a data frame with at least columns name_x and name_y (plus an optional user_note column), or a file path to a CSV with the same columns. Any name listed here bypasses the cascade and is recorded as match_type = "manual". Useful for applying published crosswalks (see reconcile_crosswalk()) or for locking down decisions made in a previous run.</p>
db_version	<p>A length-1 character vector. taxadb database snapshot to use (e.g. "22.12"). NULL (default) uses the latest available.</p>
fuzzy	<p>Logical. Enables the fuzzy-matching stage when TRUE. Default FALSE. Turn this on to catch likely typos (<i>Corvus brachyrhynchos</i> -> <i>Corvus brachyrhynchos</i>). When FALSE, stages 1–3 still run.</p>
fuzzy_threshold	<p>Numeric in [0, 1]. Minimum genus-weighted similarity score for a fuzzy match to be accepted. Default 0.9 (roughly "no more than ~10% of characters differ"). Lower values (e.g. 0.7) are more permissive but produce more false positives; always review fuzzy matches with reconcile_suggest() or reconcile_review() before trusting them.</p>

flag_threshold	Numeric in [0, 1]. When resolve = "flag", fuzzy matches with a score below this value are recorded as match_type = "flagged" rather than "fuzzy", marking them for manual review. Default 0.95. Must be >= fuzzy_threshold to have any effect.
resolve	A length-1 character vector. What to do with borderline matches: "flag" (default) Mark low-confidence fuzzy matches (score below flag_threshold) and names with indirect taxadb synonymy as match_type = "flagged" so you can audit them with reconcile_review() or reconcile_suggest() . "first" Accept the highest-scoring candidate silently, without flagging. Faster but riskier; use only when you have already reviewed the ambiguities.
quiet	Logical. Suppresses progress messages when TRUE. Default FALSE.
x_label	A length-1 character vector or NULL. Human-readable label for source x stored in the reconciliation metadata and shown in print() / format(). Defaults to the expression passed as x (via deparse(substitute())). Set this explicitly when calling reconcile_data() inside another function so the label reflects the real data source rather than the local argument name.
y_label	A length-1 character vector or NULL. Same as x_label, for source y.

Details

Names are passed through a four-stage matching cascade, and the first stage that returns a match is recorded in match_type:

1. **exact** — verbatim string equality.
2. **normalized** — after stripping underscores, authority strings ("*Corvus corax Linnaeus, 1758*"), diacritics, and case/whitespace differences.
3. **synonym** — lookup in a local taxonomic database via **taxadb** (Catalogue of Life, GBIF, ITIS, NCBI, ...). Skipped if authority = NULL.
4. **fuzzy** — character-level similarity (opt-in via fuzzy = TRUE). Uses a genus-weighted Levenshtein score (60% genus, 40% specific epithet) with a genus pre-filter so that only plausibly similar genera are compared.

Names that survive all four stages are labelled unresolved. Any entries supplied through overrides take precedence over the cascade.

After the call. A reconciliation object is the input to most other functions in the package. Common next steps:

- [reconcile_summary\(\)](#) — human-readable breakdown of matches.
- [reconcile_plot\(\)](#) — one-glance bar/pie of match composition.
- [reconcile_mapping\(\)](#) — extract the full per-name tibble.
- [reconcile_suggest\(\)](#) — near-miss candidates for unresolved names.
- [reconcile_merge\(\)](#) — join the two datasets using the reconciliation as the species key.
- [reconcile_report\(\)](#) — shareable HTML audit trail.

Value

A [reconciliation](#) object. The accompanying mapping tibble, match-type counts, provenance meta-data, and applied / unused override slots are documented in [reconciliation](#). See the "After the call" section above for the most common next steps.

References

Norman, K.E., Chamberlain, S. & Boettiger, C. (2020) taxadb: A high-performance local taxonomic database interface. *Methods in Ecology and Evolution* 11:1153–1159. doi:10.1111/2041-210X.13440

See Also

[reconcile_tree\(\)](#) for matching against a phylogenetic tree; [reconcile_to_trees\(\)](#) / [reconcile_trees\(\)](#) / [reconcile_multi\(\)](#) for multi-input workflows.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
# Merge AVONET morphology with nest-site data. Both datasets use
# slightly different taxonomies; authority = NULL keeps the example
# offline (no taxadb download).
data(avonet_subset)
data(nesttrait_subset)

rec <- reconcile_data(avonet_subset, nesttrait_subset,
                    x_species = "Species1",
                    y_species = "Scientific_name",
                    authority = NULL)
rec # concise print method
reconcile_summary(rec) # full breakdown

# Join the two datasets on the reconciled species key
merged <- reconcile_merge(rec, avonet_subset, nesttrait_subset,
                        species_col_x = "Species1",
                        species_col_y = "Scientific_name")
head(merged[, c("species_resolved", "Family1", "Common_name")])
```

Description

Compare a "before" and "after" [reconciliation](#) and list every species whose outcome differs: newly matched, newly unresolved, promoted to a higher-confidence match type, or linked to a different target. Useful for:

- checking the effect of adding a taxonomy crosswalk or a batch of manual overrides,
- comparing two taxonomic authorities (e.g. Catalogue of Life vs GBIF),
- auditing changes between runs before and after tightening the fuzzy threshold.

Usage

```
reconcile_diff(x, y, quiet = FALSE)
```

Arguments

x	A reconciliation object — the "before" state.
y	A reconciliation object — the "after" state. Must be reconciled against the same x data so that name_x values are comparable.
quiet	Logical. Suppresses the console summary when TRUE. Default FALSE.

Value

A list with the following components:

gained Tibble of species matched in y but unresolved in x.

lost Tibble of species matched in x but unresolved in y.

type_changed Tibble of species whose match_type differs between the two runs.

target_changed Tibble of species whose name_y differs.

unused_overrides_diff Tibble of overrides that are in the unused_overrides slot of one reconciliation but not the other; columns name_x, name_y, reason, side ("x" or "y").

summary A one-row tibble with counts: n_gained, n_lost, n_type_changed, n_target_changed, n_shared, n_unused_override_diff.

See Also

[reconcile_crosswalk\(\)](#) for building an override table from a published taxonomy crosswalk;
[reconcile_override_batch\(\)](#) for applying many hand edits.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
x <- data.frame(species = c("A a", "A old", "B c"))
tree <- ape::read.tree(text = "((A_a:1,A_new:1):1,B_c:2);")

# Without manual overrides
r1 <- reconcile_tree(x, tree, x_species = "species",
                    authority = NULL, quiet = TRUE)

# With one manual override
overrides <- data.frame(name_x = "A old", name_y = "A new",
                        match_type = "manual")
r2 <- reconcile_tree(x, tree, x_species = "species",
                    authority = NULL, overrides = overrides,
                    quiet = TRUE)

d <- reconcile_diff(r1, r2, quiet = TRUE)
cat("Gained:", nrow(d$gained), "| Lost:", nrow(d$lost), "\n")
```

reconcile_export

Write an aligned dataset, tree, and mapping table to disk

Description

Apply a reconciliation and save three files: the aligned CSV, the pruned tree, and the full mapping tibble. Intended for producing analysis-ready, archivable outputs — drop the three files into a Zenodo deposit or a project's data-output/ folder alongside the reconciliation report and you have a fully documented provenance trail.

Usage

```
reconcile_export(
  reconciliation,
  data = NULL,
  tree = NULL,
  species_col = NULL,
  dir = tempfile("prepR4pcm-export-"),
  prefix = "reconciled",
  tree_format = c("nexus", "newick"),
  drop_unresolved = TRUE
)
```

Arguments

reconciliation A [reconciliation](#) object returned by [reconcile_tree\(\)](#), [reconcile_data\(\)](#), or a related matcher.

data A data frame to align. If NULL, only the tree and mapping are written.

tree	An ape::phylo object or file path. If NULL, only the data and mapping are written.
species_col	A length-1 character vector. Column name in data containing species names. Auto-detected when NULL.
dir	A length-1 character vector. Path to the output directory that will receive the exported files (e.g. a project's data-output/ folder, or a staging directory before a Zenodo deposit). Created if it does not exist. By default, a unique temporary directory is used so the function does not write to the current working directory unless you explicitly request it.
prefix	A length-1 character vector. File name prefix. Default "reconciled".
tree_format	A length-1 character vector. Tree output format: "nexus" (default) or "newick".
drop_unresolved	Logical. Drops unresolved species when TRUE. Default TRUE.

Value

A named list of file paths (invisibly): \$data (CSV), \$tree (Nexus or Newick), \$mapping (CSV), and \$unused_overrides (CSV; NULL when there are no rejected overrides on the reconciliation).

See Also

[reconcile_apply\(\)](#) for in-memory alignment without writing to disk; [reconcile_report\(\)](#) for a self-contained HTML audit trail.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jetz)
result <- reconcile_tree(avonet_subset, tree_jetz,
                        x_species = "Species1", authority = NULL)
out_dir <- tempfile("export_")
files <- reconcile_export(result,
                        data = avonet_subset, tree = tree_jetz,
                        species_col = "Species1",
                        dir = out_dir, prefix = "avonet_jetz")

files$data      # path to CSV
files$tree      # path to Nexus tree
files$mapping   # path to mapping CSV
unlink(out_dir, recursive = TRUE) # clean up
```

reconcile_mapping	<i>Extract the per-name mapping table from a reconciliation</i>
-------------------	---

Description

Returns the mapping tibble inside a [reconciliation](#) object. Use this when you want to filter matches programmatically (e.g. pull all unresolved species, all fuzzy matches above a given score, or join the mapping back to the original data frame).

Usage

```
reconcile_mapping(reconciliation, include_unused_overrides = FALSE)
```

Arguments

reconciliation A [reconciliation](#) object returned by [reconcile_tree\(\)](#), [reconcile_data\(\)](#), [reconcile_trees\(\)](#), [reconcile_to_trees\(\)](#), or [reconcile_multi\(\)](#).

include_unused_overrides
 Logical. Appends the rejected override rows to the returned tibble when TRUE, with `match_type = "override_unused"`, `match_score = NA`, and the notes column carrying the rejection reason (`name_x_not_in_data`, `name_y_not_in_target`, or `already_matched`). Default FALSE for backward compatibility — the bare mapping tibble has the same shape as before.

Value

A tibble with one row per unique name seen in either source and the following columns:

name_x Statement: this column holds the original name as it appeared in source x (your data). NA for rows that exist only in source y (e.g. tree tips not in your data).

name_y Statement: this column holds the original name as it appeared in source y (the reference dataset or tree). NA for rows that exist only in source x.

name_resolved The accepted/canonical name returned by the taxonomic authority, when synonym resolution was used. NA when `authority = NULL` or no synonym was found.

match_type One of "exact", "normalized", "synonym", "fuzzy", "manual" (set via [reconcile_override\(\)](#)), "flagged" (low-confidence, needs review), "unresolved", or — when `include_unused_overrides = TRUE` — "override_unused" (override row not applied because of missing names or prior matches).

match_score Numeric in [0, 1]. 1 for exact/normalized/synonym/manual matches; a genus-weighted Levenshtein score for fuzzy matches; NA for unresolved and for unused-override rows.

match_source Where the match came from: "exact", "normalisation", the taxadb authority code (e.g. "col"), "fuzzy", or "user_override".

in_x Logical. This column records whether the name was present in source x.

in_y Logical. This column records whether the name was present in source y.

notes Free-text notes, populated e.g. when a name is flagged for review or when an override carries a user comment. For `match_type = "override_unused"` rows this column carries the rejection reason.

See Also

[reconcile_summary\(\)](#) for a printed breakdown; [reconcile_suggest\(\)](#) for near-miss candidates for unresolved names; [reconcile_apply\(\)](#) to turn the mapping into an aligned data-tree pair. The unused-override rows surfaced by `include_unused_overrides = TRUE` mirror the `unused_overrides` slot on the [reconciliation](#) object.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jet2)
rec <- reconcile_tree(avonet_subset, tree_jet2,
                     x_species = "Species1", authority = NULL)
mapping <- reconcile_mapping(rec)

# How many species matched?
sum(mapping$in_x & mapping$in_y)

# Which species are in the data but missing from the tree?
head(mapping[mapping$in_x & !mapping$in_y, c("name_x", "match_type")])

# Append rejected overrides for audit
mapping_full <- reconcile_mapping(rec, include_unused_overrides = TRUE)
```

reconcile_merge	<i>Merge two reconciled datasets</i>
-----------------	--------------------------------------

Description

After reconciling two datasets with [reconcile_data\(\)](#), use this function to join them into a single analysis-ready data frame. The reconciliation mapping table provides the species-level join key, so names that differ between the two datasets (due to formatting, synonyms, or typos) are correctly linked.

Usage

```
reconcile_merge(
  reconciliation,
  data_x,
  data_y,
  species_col_x = NULL,
  species_col_y = NULL,
```

```

how = c("inner", "left", "full"),
suffix = c("_x", "_y"),
drop_unresolved = FALSE
)

```

Arguments

reconciliation A [reconciliation](#) object (typically from [reconcile_data\(\)](#)).

data_x The first data frame (source x in the reconciliation).

data_y The second data frame (source y in the reconciliation).

species_col_x A length-1 character vector. Species column in data_x. Auto-detected if NULL.

species_col_y A length-1 character vector. Species column in data_y. Auto-detected if NULL.

how A length-1 character vector. Join type:

- "inner" (default): keep only species matched in both datasets.
- "left": keep all species from data_x.
- "full": keep all species from both datasets.

suffix A length-2 character vector. Suffixes to disambiguate columns with the same name in both datasets. Default c("_x", "_y").

drop_unresolved Logical. If TRUE, rows where `species_resolved` is NA (i.e., species that could not be reconciled) are removed from the final result. Default FALSE (keep all rows, fill unmatched columns with NA). Only relevant for `how = "left"` or `how = "full"`; inner joins drop unmatched rows by definition.

Details

One row per species. `reconcile_merge()` works best when each dataset has exactly one row per species. If a species appears in multiple rows (e.g., sex-specific measurements, repeated populations), the merge produces all pairwise combinations for that species—the same behaviour as base [merge\(\)](#). To avoid unexpected row expansion, aggregate to one row per species before merging, or be aware that the output will contain more rows than either input.

Asymmetric datasets. When `data_y` contains many more species than `data_x` (common when merging against a large reference database), use `how = "inner"` or `how = "left"`. Inner joins keep only the species present in both datasets; left joins keep all `data_x` rows and fill `data_y` columns with NA for unmatched species. Use `how = "full"` only when you need to retain species unique to either side.

Recommended workflow for multi-row data. Reconcile using a species-level summary (one row per species), inspect the mapping with [reconcile_mapping\(\)](#), then join the mapping back to your full dataset using the species column as key.

Value

A data frame with a `species_resolved` column as the join key, plus all columns from both datasets (with suffixes added when column names collide).

See Also

`reconcile_data()` to build the reconciliation; `reconcile_apply()` when you want aligned data + tree instead of a single merged data frame.

Other reconciliation functions: `reconcile_apply()`, `reconcile_augment()`, `reconcile_crosswalk()`, `reconcile_data()`, `reconcile_diff()`, `reconcile_export()`, `reconcile_mapping()`, `reconcile_multi()`, `reconcile_override()`, `reconcile_override_batch()`, `reconcile_plot()`, `reconcile_report()`, `reconcile_review()`, `reconcile_splits_lumps()`, `reconcile_suggest()`, `reconcile_summary()`, `reconcile_to_trees()`, `reconcile_tree()`, `reconcile_trees()`

Examples

```
data(avonet_subset)
data(nesttrait_subset)

rec <- reconcile_data(avonet_subset, nesttrait_subset,
  x_species = "Species1",
  y_species = "Scientific_name",
  authority = NULL, quiet = TRUE)

merged <- reconcile_merge(rec, avonet_subset, nesttrait_subset,
  species_col_x = "Species1",
  species_col_y = "Scientific_name")
cat(sprintf("Merged: %d rows, %d cols\n", nrow(merged), ncol(merged)))
head(merged[, c("species_resolved", "Family1", "Common_name")])
```

reconcile_multi

Reconcile several datasets against one phylogenetic tree

Description

Match several trait or occurrence datasets against a single phylogenetic tree in one call. Species that appear in more than one dataset are reconciled once; the combined mapping records which dataset(s) each species belongs to, making it easy to identify the set of species with complete trait coverage.

Usage

```
reconcile_multi(
  datasets,
  tree,
  species_cols = NULL,
  authority = "col",
  rank = c("species", "subspecies"),
  overrides = NULL,
  db_version = NULL,
  fuzzy = FALSE,
```

```
fuzzy_threshold = 0.9,
resolve = c("flag", "first"),
quiet = FALSE
)
```

Arguments

datasets	A named list of data frames. The names are used as dataset labels (e.g. morpho, nests, plumage) in the output.
tree	An ape::phylo object, or a path to a Newick/Nexus file.
species_cols	Character vector. Species column name in each dataset. If length 1, the same column name is used for every dataset. Auto-detected from each data frame if NULL.
authority	<p>A length-1 character vector, or NULL. Taxonomic authority used for synonym resolution (stage 3 of the cascade). One of:</p> <p>"col" (default) Catalogue of Life — broad, curated, frequently updated. A sensible default for most taxa.</p> <p>"itis" Integrated Taxonomic Information System — strong for North American vertebrates and plants.</p> <p>"gbif" Global Biodiversity Information Facility backbone. Wider coverage; includes more recent synonymy.</p> <p>"ncbi" NCBI Taxonomy — best when working with sequence data.</p> <p>"ott" Open Tree of Life synthetic taxonomy. Useful when your downstream phylogeny is from the Open Tree synthesis.</p> <p>"itis_test" A small bundled subset of ITIS, cached locally with taxadb for testing. Intended for examples and unit tests; not for analysis.</p> <p>"gnverifier" HTTP-backed verification against ~100 sources via the Global Names verifier; no local database download. See vignette("getting-started") for the trade-off (wider coverage, requires network and the httr2 package).</p> <p>NULL Skip the synonym stage entirely. Useful for quick checks or when taxadb is unavailable. Stages 1, 2 and 4 still run.</p> <p>Five authority codes that earlier versions of the package advertised — "iucn", "tpl", "fb", "slb", "wd" — are no longer accepted. Empirical testing against taxadb v22.12 showed that iucn errors with a schema mismatch and the others are not taxadb providers at all. Passing one of those values now produces a helpful migration error.</p>
rank	<p>A length-1 character vector. Controls how trinomials are handled during normalisation:</p> <p>"species" (default) Strip infraspecific epithets so that "Parus major major" becomes "Parus major" before matching.</p> <p>"subspecies" Keep trinomials intact. Use this when your analysis operates at subspecies level.</p>
overrides	Optional pre-built corrections. Either a data frame with at least columns name_x and name_y (plus an optional user_note column), or a file path to a CSV with the same columns. Any name listed here bypasses the cascade and is recorded

	as <code>match_type = "manual"</code> . Useful for applying published crosswalks (see reconcile_crosswalk()) or for locking down decisions made in a previous run.
<code>db_version</code>	A length-1 character vector. taxadb database snapshot to use (e.g. "22.12"). NULL (default) uses the latest available.
<code>fuzzy</code>	Logical. Enables the fuzzy-matching stage when TRUE. Default FALSE. Turn this on to catch likely typos (<i>Corvus brachyrhynchos</i> -> <i>Corvus brachyrhynchos</i>). When FALSE, stages 1–3 still run.
<code>fuzzy_threshold</code>	Numeric in [0, 1]. Minimum genus-weighted similarity score for a fuzzy match to be accepted. Default 0.9 (roughly "no more than ~10% of characters differ"). Lower values (e.g. 0.7) are more permissive but produce more false positives; always review fuzzy matches with reconcile_suggest() or reconcile_review() before trusting them.
<code>resolve</code>	A length-1 character vector. What to do with borderline matches: "flag" (default) Mark low-confidence fuzzy matches (score below <code>flag_threshold</code>) and names with indirect taxadb synonymy as <code>match_type = "flagged"</code> so you can audit them with reconcile_review() or reconcile_suggest() . "first" Accept the highest-scoring candidate silently, without flagging. Faster but riskier; use only when you have already reviewed the ambiguities.
<code>quiet</code>	Logical. Suppresses progress messages when TRUE. Default FALSE.

Value

A [reconciliation](#) object. The mapping tibble gains one logical column per input dataset (e.g. `in_morpho`, `in_nests`) indicating which datasets contained each species.

See Also

[reconcile_tree\(\)](#) for the single-dataset case; [reconcile_merge\(\)](#) to join two datasets after reconciliation.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(nesttrait_subset)
data(tree_jetz)
datasets <- list(
  morpho = avonet_subset,
  nests = nesttrait_subset
)
result <- reconcile_multi(datasets, tree_jetz,
  species_cols = c("Species1", "Scientific_name"),
```

```

                                authority = NULL)
print(result)

```

reconcile_override *Manually override a single name in a reconciliation*

Description

Apply a single hand-curated decision to a [reconciliation](#) object. Use this to accept a match the matching cascade rejected (typically a flagged fuzzy hit), remove a spurious match, or force a new mapping that the cascade missed. ("Cascade" here means the four-stage matching pipeline run by [reconcile_tree\(\)](#) and [reconcile_data\(\)](#) — exact, normalised, synonym, fuzzy — as described in ?prepR4pcm.) The override is recorded in the provenance log so that you and your reviewers can audit every manual decision.

Usage

```

reconcile_override(
  reconciliation,
  name_x,
  name_y = NULL,
  action = c("accept", "reject", "replace"),
  note = ""
)

```

Arguments

reconciliation	A reconciliation object.
name_x	A length-1 character vector. The name as it appears in source x (your data). Must match a value already present in mapping\$name_x.
name_y	A length-1 character vector or NULL. The name in source y (the tree or reference dataset) that name_x should be mapped to. NULL is only valid when action = "reject".
action	A length-1 character vector. What the override does: "accept" (default) Confirm a proposed match. Use after reviewing a flagged fuzzy or synonym hit. "reject" Remove an existing match and return both names to the unresolved pool. Use when the cascade over-matched (e.g. an aggressive fuzzy score linked the wrong species). "replace" Set a new match, overwriting whatever the cascade produced for name_x.
note	A length-1 character vector. A short justification for the override, stored in the provenance log and in mapping\$notes. Strongly recommended — future you will want to know why this decision was made.

Details

For applying many overrides at once (e.g. from a curated CSV), see [reconcile_override_batch\(\)](#); for interactive decisions in the console, see [reconcile_review\(\)](#); for published taxonomy crosswalks, see [reconcile_crosswalk\(\)](#).

Value

An updated [reconciliation](#) object. The existing row for name_x is replaced with one whose match_type is "manual" and match_source is "user_override".

See Also

[reconcile_override_batch\(\)](#) for bulk overrides; [reconcile_suggest\(\)](#) for near-miss candidates; [reconcile_crosswalk\(\)](#) for published taxonomy crosswalks.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jetz)
rec <- reconcile_tree(avonet_subset, tree_jetz,
                     x_species = "Species1", authority = NULL)

# Pick an unresolved species and hand-assign it for illustration
unresolved <- reconcile_mapping(rec)
unresolved <- unresolved[unresolved$match_type == "unresolved" &
                        unresolved$in_x, ]
if (nrow(unresolved) > 0) {
  rec <- reconcile_override(
    rec,
    name_x = unresolved$name_x[1],
    name_y = tree_jetz$tip.label[1],
    note   = "Demo: manual assignment"
  )
}
```

reconcile_override_batch

Apply many manual corrections to a reconciliation at once

Description

A convenience wrapper around [reconcile_override\(\)](#) for curated batches of manual decisions.

Usage

```
reconcile_override_batch(reconciliation, overrides, quiet = FALSE)
```

Arguments

reconciliation A [reconciliation](#) object returned by [reconcile_tree\(\)](#), [reconcile_data\(\)](#), or a related matcher.

overrides A data frame, or a length-1 character vector giving the path to a CSV file with the same columns:

- name_x (required)** The original name in source x (your data).
- action** One of "accept" (default), "reject", "replace". See [reconcile_override\(\)](#) for the semantics.
- name_y** The target name in source y; required for "accept" and "replace".
- note** Optional free-text justification.

quiet Logical. Suppresses per-override success messages when TRUE. Default FALSE.

Details

Typical workflow: generate a CSV of corrections (by hand, or with the help of [reconcile_suggest\(\)](#)), check it into version control, and apply it on every run so the corrections are reproducible and reviewable.

Value

An updated [reconciliation](#) object with all overrides applied.

See Also

[reconcile_override\(\)](#) for the single-override case; [reconcile_crosswalk\(\)](#) for building an override table from a published taxonomy crosswalk.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jetz)
result <- reconcile_tree(avonet_subset, tree_jetz,
                        x_species = "Species1", authority = NULL)
# Create a batch of overrides
batch <- data.frame(
  name_x = reconcile_mapping(result)$name_x[
    reconcile_mapping(result)$match_type == "unresolved" &
    reconcile_mapping(result)$in_x][1:2],
  name_y = tree_jetz$tip.label[1:2],
```

```

    action = "accept",
    note = "Batch demo",
    stringsAsFactors = FALSE
  )
  batch <- batch[!is.na(batch$name_x), ]
  if (nrow(batch) > 0) {
    result2 <- reconcile_override_batch(result, batch)
  }

```

reconcile_plot	<i>Plot the match composition of a reconciliation</i>
----------------	---

Description

Draw a one-glance bar or pie chart of how species names were resolved (exact, normalised, synonym, fuzzy, flagged, manual, unresolved). Uses base R graphics only, so no additional packages are required.

Usage

```
reconcile_plot(reconciliation, type = c("bar", "pie"), ...)
```

Arguments

reconciliation	A reconciliation object returned by reconcile_tree() , reconcile_data() , or a related matcher.
type	A length-1 character vector. Plot style: "bar" (default) Horizontal stacked bar chart. Best for slides, reports, and scripting. "pie" Pie chart. Useful when the match types are roughly balanced.
...	Additional arguments passed on to graphics::barplot() or graphics::pie() (e.g. main, col, border).

Value

The input reconciliation, invisibly, so you can use the function in a pipe.

See Also

[reconcile_summary\(\)](#) for a textual breakdown; [reconcile_report\(\)](#) for a full HTML audit trail.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jet2)
rec <- reconcile_tree(avonet_subset, tree_jet2,
                     x_species = "Species1", authority = NULL)
reconcile_plot(rec)
reconcile_plot(rec, type = "pie")
```

reconcile_report	<i>Write a self-contained HTML reconciliation report</i>
------------------	--

Description

Produce an HTML file summarising a [reconciliation](#) object: provenance metadata, match-type breakdown, full mapping table, and a list of unresolved / flagged species. The file has no external dependencies (CSS is inlined), so it is suitable for sharing with collaborators, pasting into supplementary materials, or archiving next to analysis outputs.

Usage

```
reconcile_report(
  reconciliation,
  file,
  title = "Reconciliation Report",
  open = interactive()
)
```

Arguments

reconciliation	A reconciliation object returned by reconcile_tree() , reconcile_data() , or a related matcher.
file	A length-1 character vector. Output file path. Must end in <code>.html</code> .
title	A length-1 character vector. Report title shown at the top of the page. Default is generic.
open	Logical. Open the finished report in the default browser? Defaults to TRUE in interactive sessions, FALSE otherwise (so it does not block scripts).

Details

Value

The file path, invisibly.

Layout

The report opens with a run header (the originating `reconcile_tree()` / `reconcile_data()` call, timestamp, package version), the match-coverage summary, and a compact bar chart of match composition. Below those, per-match-type detail tables (normalised, synonym, fuzzy, flagged) and the unresolved-species list make each decision auditable. The bird-workflow vignette includes annotated screenshots of both sections.

See Also

[reconcile_summary\(\)](#) for a console equivalent; [reconcile_export\(\)](#) to additionally save aligned data and tree files.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jet2)
rec <- reconcile_tree(avonet_subset, tree_jet2,
                     x_species = "Species1", authority = NULL)
f <- tempfile(fileext = ".html")
reconcile_report(rec, file = f, open = FALSE)
cat("Report written to:", f, "\n")
```

<code>reconcile_review</code>	<i>Interactively review reconciliation matches</i>
-------------------------------	--

Description

Presents matches one at a time for manual accept/reject decisions in an interactive R session. Each accepted or rejected match is applied via [reconcile_override\(\)](#), updating the reconciliation object in place. Useful for auditing fuzzy or flagged matches in the console or RStudio.

Usage

```
reconcile_review(
  reconciliation,
  type = c("flagged", "fuzzy", "all_unresolved"),
  suggest = TRUE,
  quiet = FALSE
)
```

Arguments

reconciliation	A reconciliation object returned by reconcile_tree() , reconcile_data() , or a related matcher.
type	A length-1 character vector. Which matches to review: "flagged" Only flagged matches (default). "fuzzy" Fuzzy and flagged matches. "all_unresolved" All unresolved species.
suggest	Logical. If TRUE and type = "all_unresolved", show the closest fuzzy candidate (if any) alongside unresolved names. Default TRUE.
quiet	Logical. If TRUE, suppress the end-of-review summary. Default FALSE.

Details

This function requires an interactive session. In non-interactive contexts (e.g., scripts, CI), it warns and returns reconciliation unchanged.

At each prompt the user may enter:

- a Accept the proposed match (calls [reconcile_override\(\)](#) with action = "accept").
- r Reject the match (calls [reconcile_override\(\)](#) with action = "reject").
- s Skip – move to the next item without changes.
- q Quit – return the current state immediately.

Value

An updated [reconciliation](#) object reflecting accepted and rejected decisions.

See Also

[reconcile_override\(\)](#) and [reconcile_override_batch\(\)](#) for non-interactive corrections; [reconcile_suggest\(\)](#) for shortlisting unresolved species before review.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
if (interactive()) {
  # Interactive review in RStudio console:
  result <- reconcile_review(result, type = "flagged")
}
```

`reconcile_splits_lumps`*Flag taxonomic splits and lumps in a reconciliation*

Description

Taxonomic revisions often split a single species into several or lump several into one. When your data and your reference taxonomy disagree on such cases, the reconciliation mapping will show one name in one source linked to multiple accepted names in the other. `reconcile_splits_lumps()` scans a [reconciliation](#) for these cases and returns them as two tibbles, one for splits and one for lumps, so you can decide how to handle each before running your PCM (e.g. keep only one of the split taxa, pool traits across a lumped set, or exclude them entirely).

Usage

```
reconcile_splits_lumps(reconciliation, quiet = FALSE)
```

Arguments

`reconciliation` A [reconciliation](#) object built with a non-NULL authority argument. The function inspects the `name_resolved` column, which is only populated when synonym resolution was performed.

`quiet` Logical. Suppresses the console summary when TRUE. Default FALSE.

Details

Detection relies on the `name_resolved` column populated by synonym resolution — so authority must have been set (i.e. not NULL) when building the reconciliation.

Value

Invisibly, a list with two tibbles:

`splits` Cases where one name in source x corresponds to multiple accepted names in source y.

`lumps` Cases where several names in source x share a single accepted name in source y.

See Also

[reconcile_diff\(\)](#) for comparing two reconciliations, which surfaces the same splits/lumps across taxonomy versions.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```

# `reconcile_splits_lumps()` only surfaces rows that synonym lookup
# resolved (`match_type == "synonym"`), which requires `authority`
# to be non-NULL when building the reconciliation. The bundled-data
# call below uses `authority = NULL` for speed, so the output is
# empty:
data(avonet_subset)
data(tree_jetz)
rec <- reconcile_tree(avonet_subset, tree_jetz,
                     x_species = "Species1", authority = NULL,
                     quiet = TRUE)
sl <- reconcile_splits_lumps(rec, quiet = TRUE)
nrow(sl$splits); nrow(sl$lumps) # 0 and 0

# To show what the output looks like when splits and lumps DO turn
# up, we hand-build a tiny reconciliation. In practice you would
# obtain this by calling reconcile_tree(..., authority = "col").
#
# * Acanthiza pusilla (data) was split in CoL into A. pusilla and
#   A. apicalis (1 x-name -> 2 y-names ==> split).
# * Parus caeruleus and Cyanistes caeruleus (data: old + new names)
#   both map to Cyanistes caeruleus in CoL
#   (2 x-names -> 1 y-name ==> lump).
demo_mapping <- tibble::tibble(
  name_x      = c("Acanthiza pusilla", "Acanthiza pusilla",
                 "Parus caeruleus",  "Cyanistes caeruleus"),
  name_y      = c("Acanthiza pusilla", "Acanthiza apicalis",
                 "Cyanistes caeruleus", "Cyanistes caeruleus"),
  name_resolved = c("Acanthiza pusilla", "Acanthiza pusilla",
                  "Cyanistes caeruleus", "Cyanistes caeruleus"),
  match_type  = "synonym",
  match_score = 1,
  match_source = "col",
  in_x        = TRUE,
  in_y        = TRUE,
  notes       = NA_character_
)
rec_demo <- structure(
  list(mapping = demo_mapping,
        meta   = list(type = "data_tree", authority = "col"),
        counts = list(),
        overrides = tibble::tibble()),
  class = "reconciliation"
)
sl <- reconcile_splits_lumps(rec_demo, quiet = TRUE)
sl$splits # 1 row: Acanthiza pusilla split into 2 taxa
sl$lumps  # 1 row: Parus + Cyanistes lumped into 1 taxon

```

Description

For every species that the four-stage cascade failed to resolve, `reconcile_suggest()` returns the top-*n* candidate matches in the reference source (*y*). The cascade is the exact -> normalised -> synonym -> fuzzy matching process run by `reconcile_tree()` and `reconcile_data()` (see `?prepR4pcm`). This is the most efficient way to audit orphan species: a typo or a species epithet that drifted by one letter will usually appear near the top of the list, and you can then feed the fix to `reconcile_override()` or `reconcile_override_batch()`.

Usage

```
reconcile_suggest(reconciliation, n = 3, threshold = 0.7, quiet = FALSE)
```

Arguments

<code>reconciliation</code>	A <code>reconciliation</code> object returned by <code>reconcile_tree()</code> , <code>reconcile_data()</code> , or a related matcher.
<code>n</code>	Integer. Maximum number of suggestions to return per unresolved species. Default 3.
<code>threshold</code>	Numeric in [0, 1]. Minimum weighted similarity score for a candidate to be listed. Default 0.7 (quite permissive, because the idea is to surface candidates for review). Raise to 0.85 for a tighter shortlist.
<code>quiet</code>	Logical. Suppresses informational messages when TRUE. Default FALSE.

Details

Similarity is computed from the Levenshtein edit distance between normalised names — i.e., the minimum number of character insertions, deletions and substitutions needed to turn one name into the other, divided by the length of the longer name and subtracted from 1. The final score is weighted 60% genus, 40% specific epithet, which heavily penalises genus-level disagreement while tolerating small epithet differences.

For computational efficiency on large trees, `reconcile_suggest()` only compares a query name against reference names whose genus is within 2 character edits of the query genus. This can very occasionally miss a match where both the genus and the epithet are badly misspelled simultaneously; if you suspect that, lower the `threshold` and inspect manually.

Value

A tibble with one row per (unresolved, suggestion) pair:

<code>unresolved</code>	The unresolved name from source <i>x</i> .
<code>suggestion</code>	A candidate name from source <i>y</i> .
<code>score</code>	Weighted similarity in [<code>threshold</code> , 1].

Rows are sorted by `unresolved` then descending `score`, so the first suggestion for each name is the best candidate.

See Also

[reconcile_override\(\)](#) / [reconcile_override_batch\(\)](#) to act on suggestions; [reconcile_review\(\)](#) for an interactive alternative.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jet2)
rec <- reconcile_tree(avonet_subset, tree_jet2,
                    x_species = "Species1", authority = NULL)

suggestions <- reconcile_suggest(rec, n = 2, threshold = 0.85)
head(suggestions, 10)
```

reconcile_summary *Print a reconciliation summary to the console*

Description

Produce a human-readable breakdown of a [reconciliation](#) object: how many names matched exactly, how many were rescued by normalisation, synonymy, or fuzzy matching, and which names remain unresolved. Usually the second function you call after [reconcile_tree\(\)](#) or [reconcile_data\(\)](#).

Usage

```
reconcile_summary(
  reconciliation,
  detail = c("full", "brief", "mismatches_only"),
  format = c("console", "data.frame"),
  file = NULL,
  ...
)
```

Arguments

reconciliation A [reconciliation](#) object returned by [reconcile_tree\(\)](#), [reconcile_data\(\)](#), or a related matcher.

detail A length-1 character vector. How much to show:
 "full" (**default**) Every match category, with the names belonging to each category listed out.

	"brief" Counts only — a one-screen overview.
	"mismatches_only" Non-exact matches and unresolved names. Useful once the easy cases are out of the way and you want to focus on what still needs review.
format	A length-1 character vector. Where the summary goes: "console" (default) Pretty-printed to the screen. "data.frame" Returns a list of tibbles silently; useful when writing a report or table in a larger script.
file	A length-1 character vector or NULL. If non-NULL, writes the console report to this file path in addition to printing it.
...	Additional arguments (currently unused).

Value

A reconciliation_summary object. The formatted report is attached to the object and rendered by `print.reconciliation_summary()`. R's REPL auto-printing means that calling the function at the prompt without assignment shows the full report; assigning the result to a variable shows nothing until you `print(x)` (or auto-print `x`). Use `invisible(reconcile_summary(rec))` to suppress display at the prompt entirely.

See Also

[reconcile_plot\(\)](#) for a visual summary; [reconcile_report\(\)](#) for a shareable HTML audit trail; [reconcile_mapping\(\)](#) for the full per-name tibble.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jet2)
rec <- reconcile_tree(avonet_subset, tree_jet2,
                     x_species = "Species1", authority = NULL)
reconcile_summary(rec, detail = "brief")
reconcile_summary(rec, detail = "mismatches_only")
```

reconcile_to_trees *Reconcile one dataset against multiple phylogenetic trees*

Description

Takes a single data frame and matches it against each tree in a named list, returning one reconciliation object per tree. This is the standard workflow for generating separate tree-compatible datasets aligned to different phylogenies (e.g., Clements 2023, 2024, 2025, Jetz 2012).

Usage

```
reconcile_to_trees(
  x,
  trees,
  x_species = NULL,
  authority = "col",
  rank = c("species", "subspecies"),
  overrides = NULL,
  db_version = NULL,
  fuzzy = FALSE,
  fuzzy_threshold = 0.9,
  resolve = c("flag", "first"),
  quiet = FALSE,
  x_label = NULL
)
```

Arguments

<code>x</code>	A data frame.
<code>trees</code>	A named list of <code>ape::phylo</code> objects or file paths.
<code>x_species</code>	A length-1 character vector. Column name in <code>x</code> containing species names. Auto-detected if <code>NULL</code> .
<code>authority</code>	<p>A length-1 character vector, or <code>NULL</code>. Taxonomic authority used for synonym resolution (stage 3 of the cascade). One of:</p> <ul style="list-style-type: none"> <code>"col"</code> (default) Catalogue of Life — broad, curated, frequently updated. A sensible default for most taxa. <code>"itis"</code> Integrated Taxonomic Information System — strong for North American vertebrates and plants. <code>"gbif"</code> Global Biodiversity Information Facility backbone. Wider coverage; includes more recent synonymy. <code>"ncbi"</code> NCBI Taxonomy — best when working with sequence data. <code>"ott"</code> Open Tree of Life synthetic taxonomy. Useful when your downstream phylogeny is from the Open Tree synthesis. <code>"itis_test"</code> A small bundled subset of ITIS, cached locally with taxadb for testing. Intended for examples and unit tests; not for analysis. <code>"gnverifier"</code> HTTP-backed verification against ~100 sources via the Global Names verifier; no local database download. See <code>vignette("getting-started")</code> for the trade-off (wider coverage, requires network and the httr2 package). <p><code>NULL</code> Skip the synonym stage entirely. Useful for quick checks or when taxadb is unavailable. Stages 1, 2 and 4 still run.</p> <p>Five authority codes that earlier versions of the package advertised — <code>"iucn"</code>, <code>"tpl"</code>, <code>"fb"</code>, <code>"slb"</code>, <code>"wd"</code> — are no longer accepted. Empirical testing against taxadb v22.12 showed that <code>iucn</code> errors with a schema mismatch and the others are not taxadb providers at all. Passing one of those values now produces a helpful migration error.</p>

rank	<p>A length-1 character vector. Controls how trinomials are handled during normalisation:</p> <p>"species" (default) Strip infraspecific epithets so that "Parus major major" becomes "Parus major" before matching.</p> <p>"subspecies" Keep trinomials intact. Use this when your analysis operates at subspecies level.</p>
overrides	<p>Optional pre-built corrections. Either a data frame with at least columns name_x and name_y (plus an optional user_note column), or a file path to a CSV with the same columns. Any name listed here bypasses the cascade and is recorded as match_type = "manual". Useful for applying published crosswalks (see reconcile_crosswalk()) or for locking down decisions made in a previous run.</p>
db_version	<p>A length-1 character vector. taxadb database snapshot to use (e.g. "22.12"). NULL (default) uses the latest available.</p>
fuzzy	<p>Logical. Enables the fuzzy-matching stage when TRUE. Default FALSE. Turn this on to catch likely typos (<i>Corvus brachyrhncos</i> -> <i>Corvus brachyrhynchos</i>). When FALSE, stages 1–3 still run.</p>
fuzzy_threshold	<p>Numeric in [0, 1]. Minimum genus-weighted similarity score for a fuzzy match to be accepted. Default 0.9 (roughly "no more than ~10% of characters differ"). Lower values (e.g. 0.7) are more permissive but produce more false positives; always review fuzzy matches with reconcile_suggest() or reconcile_review() before trusting them.</p>
resolve	<p>A length-1 character vector. What to do with borderline matches:</p> <p>"flag" (default) Mark low-confidence fuzzy matches (score below flag_threshold) and names with indirect taxadb synonymy as match_type = "flagged" so you can audit them with reconcile_review() or reconcile_suggest().</p> <p>"first" Accept the highest-scoring candidate silently, without flagging. Faster but riskier; use only when you have already reviewed the ambiguities.</p>
quiet	<p>Logical. Suppresses progress messages when TRUE. Default FALSE.</p>
x_label	<p>A length-1 character vector or NULL. Human-readable label for source x stored in the reconciliation metadata and shown in <code>print()</code> / <code>format()</code>. Defaults to the expression passed as x (via <code>deparse(substitute())</code>). Set this explicitly when calling <code>reconcile_data()</code> inside another function so the label reflects the real data source rather than the local argument name.</p>

Details

Species names in x are normalised once and reused across all trees, so synonym lookups are not repeated.

Value

A named list of [reconciliation](#) objects, one per tree, with the same names as trees.

See Also

[reconcile_tree\(\)](#) for the single-tree case; [reconcile_diff\(\)](#) to compare two reconciliations (e.g. to quantify how many species are gained or lost by switching taxonomies).

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_tree\(\)](#), [reconcile_trees\(\)](#)

Examples

```
data(avonet_subset)
data(tree_jet2)
data(tree_clements25)
results <- reconcile_to_trees(
  avonet_subset,
  trees = list(jetz = tree_jet2, clements = tree_clements25),
  x_species = "Species1",
  authority = NULL
)
# Compare overlap across trees
sapply(results, function(r) r$counts$n_exact)
```

reconcile_tree

Reconcile species names between a dataset and a phylogenetic tree

Description

Match the species in a trait data frame (*x*) to the tip labels of a phylogenetic tree (*tree*), producing a [reconciliation](#) object ready to feed into [reconcile_apply\(\)](#), PGLS, phylogenetic GLMMs, ancestral state reconstruction, or any other phylogenetic comparative method (PCM). This is typically the first function you call in a prepR4pcm workflow.

Usage

```
reconcile_tree(
  x,
  tree,
  x_species = NULL,
  authority = "col",
  rank = c("species", "subspecies"),
  overrides = NULL,
  db_version = NULL,
  fuzzy = FALSE,
  fuzzy_threshold = 0.9,
  flag_threshold = 0.95,
```

```

    resolve = c("flag", "first"),
    quiet = FALSE,
    x_label = NULL
  )

```

Arguments

x	A data frame containing the trait data. Must have one column of scientific names.
tree	An <code>ape::phylo</code> object, or a length-1 character vector giving the path to a Newick (<code>.nwk</code> , <code>.tre</code> , <code>.tree</code>) or Nexus (<code>.nex</code> , <code>.nexus</code>) file. File format is auto-detected.
x_species	A length-1 character vector. Name of the column in <code>x</code> containing scientific names (the same column referenced by <code>x</code> above; the term “species names” elsewhere in this help page is a synonym for the same scientific names). When <code>NULL</code> , the column is auto-detected from a small list of common labels (e.g. <code>species</code> , <code>Species1</code> , <code>scientific_name</code>); the list is not exhaustive — pass the column name explicitly if your data uses a non-standard label.
authority	<p>A length-1 character vector, or <code>NULL</code>. Taxonomic authority used for synonym resolution (stage 3 of the cascade). One of:</p> <ul style="list-style-type: none"> <code>"col"</code> (default) Catalogue of Life — broad, curated, frequently updated. A sensible default for most taxa. <code>"itis"</code> Integrated Taxonomic Information System — strong for North American vertebrates and plants. <code>"gbif"</code> Global Biodiversity Information Facility backbone. Wider coverage; includes more recent synonymy. <code>"ncbi"</code> NCBI Taxonomy — best when working with sequence data. <code>"ott"</code> Open Tree of Life synthetic taxonomy. Useful when your downstream phylogeny is from the Open Tree synthesis. <code>"itis_test"</code> A small bundled subset of ITIS, cached locally with taxadb for testing. Intended for examples and unit tests; not for analysis. <code>"gnverifier"</code> HTTP-backed verification against ~100 sources via the Global Names verifier; no local database download. See <code>vignette("getting-started")</code> for the trade-off (wider coverage, requires network and the httr2 package). <p><code>NULL</code> Skip the synonym stage entirely. Useful for quick checks or when taxadb is unavailable. Stages 1, 2 and 4 still run.</p> <p>Five authority codes that earlier versions of the package advertised — <code>"iucn"</code>, <code>"tpl"</code>, <code>"fb"</code>, <code>"slb"</code>, <code>"wd"</code> — are no longer accepted. Empirical testing against taxadb v22.12 showed that <code>iucn</code> errors with a schema mismatch and the others are not taxadb providers at all. Passing one of those values now produces a helpful migration error.</p>
rank	<p>A length-1 character vector. Controls how trinomials are handled during normalisation:</p> <ul style="list-style-type: none"> <code>"species"</code> (default) Strip infraspecific epithets so that <code>"Parus major major"</code> becomes <code>"Parus major"</code> before matching. <code>"subspecies"</code> Keep trinomials intact. Use this when your analysis operates at subspecies level.

overrides	Optional pre-built corrections. Either a data frame with at least columns <code>name_x</code> and <code>name_y</code> (plus an optional <code>user_note</code> column), or a file path to a CSV with the same columns. Any name listed here bypasses the cascade and is recorded as <code>match_type = "manual"</code> . Useful for applying published crosswalks (see reconcile_crosswalk()) or for locking down decisions made in a previous run.
db_version	A length-1 character vector. taxadb database snapshot to use (e.g. "22.12"). NULL (default) uses the latest available.
fuzzy	Logical. Enables the fuzzy-matching stage when TRUE. Default FALSE. Turn this on to catch likely typos (<i>Corvus brachyrhynchos</i> -> <i>Corvus brachyrhynchos</i>). When FALSE, stages 1–3 still run.
fuzzy_threshold	Numeric in [0, 1]. Minimum genus-weighted similarity score for a fuzzy match to be accepted. Default 0.9 (roughly "no more than ~10% of characters differ"). Lower values (e.g. 0.7) are more permissive but produce more false positives; always review fuzzy matches with reconcile_suggest() or reconcile_review() before trusting them.
flag_threshold	Numeric in [0, 1]. When <code>resolve = "flag"</code> , fuzzy matches with a score below this value are recorded as <code>match_type = "flagged"</code> rather than "fuzzy", marking them for manual review. Default 0.95. Must be \geq <code>fuzzy_threshold</code> to have any effect.
resolve	A length-1 character vector. What to do with borderline matches: "flag" (default) Mark low-confidence fuzzy matches (score below <code>flag_threshold</code>) and names with indirect taxadb synonymy as <code>match_type = "flagged"</code> so you can audit them with reconcile_review() or reconcile_suggest() . "first" Accept the highest-scoring candidate silently, without flagging. Faster but riskier; use only when you have already reviewed the ambiguities.
quiet	Logical. Suppresses progress messages when TRUE. Default FALSE.
x_label	A length-1 character vector or NULL. Human-readable label for source <code>x</code> stored in the reconciliation metadata and shown in <code>print()</code> / <code>format()</code> . Defaults to the expression passed as <code>x</code> (via <code>deparse(substitute())</code>). Set this explicitly when calling <code>reconcile_data()</code> inside another function so the label reflects the real data source rather than the local argument name.

Details

Internally, `reconcile_tree()` treats the tree's tip labels as the `y` argument of [reconcile_data\(\)](#) and runs the same four-stage matching cascade (exact -> normalized -> synonym -> fuzzy). Tip labels typically differ from data names only in formatting (underscores, capitalisation, authority strings), so even with `authority = NULL` you usually recover most matches at the *normalized* stage. Turn on `fuzzy = TRUE` to also catch spelling mistakes.

After reconciliation, the typical workflow is:

1. Inspect with [reconcile_summary\(\)](#) or [reconcile_plot\(\)](#).
2. Investigate unresolved names with [reconcile_suggest\(\)](#) and fix them with [reconcile_override\(\)](#) or [reconcile_override_batch\(\)](#).

3. Produce an aligned data frame and pruned tree via `reconcile_apply()`.
4. Optionally, graft orphan species onto the tree with `reconcile_augment()` (exploratory only; always run sensitivity analyses).

Value

A **reconciliation** object with `meta$type == "data_tree"`. The mapping tibble has one row per unique name: matched species (`in_x & in_y`), data-only orphans (`in_x & !in_y`, candidates for `reconcile_augment()`), and tree-only orphans (`!in_x & in_y`, candidates for `reconcile_apply()` to prune).

References

Paradis, E. & Schliep, K. (2019) ape 5.0: an environment for modern phylogenetics and evolutionary analyses in R. *Bioinformatics* 35:526–528. doi:10.1093/bioinformatics/bty633

See Also

`reconcile_apply()` to produce an aligned data-tree pair; `reconcile_augment()` to add orphan species back to the tree; `reconcile_to_trees()` to reconcile against several trees at once; `reconcile_data()` for the data-only counterpart.

Other reconciliation functions: `reconcile_apply()`, `reconcile_augment()`, `reconcile_crosswalk()`, `reconcile_data()`, `reconcile_diff()`, `reconcile_export()`, `reconcile_mapping()`, `reconcile_merge()`, `reconcile_multi()`, `reconcile_override()`, `reconcile_override_batch()`, `reconcile_plot()`, `reconcile_report()`, `reconcile_review()`, `reconcile_splits_lumps()`, `reconcile_suggest()`, `reconcile_summary()`, `reconcile_to_trees()`, `reconcile_trees()`

Examples

```
# Reconcile the bundled AVONET subset against the Jetz et al. (2012)
# bird tree. `authority = NULL` keeps the example offline; in a real
# analysis you would usually set `authority = "col"` (Catalogue of
# Life) to pick up taxonomic synonyms.
data(avonet_subset)
data(tree_jetz)

rec <- reconcile_tree(
  avonet_subset, tree_jetz,
  x_species = "Species1",
  authority = NULL,
  fuzzy     = TRUE       # also catch typos
)
rec                                     # one-line status
reconcile_summary(rec)                 # full breakdown by match type

# Produce aligned data + pruned tree ready for PGLS / PGLMM
aligned <- reconcile_apply(rec,
  data = avonet_subset,
  tree = tree_jetz,
  species_col = "Species1",
  drop_unresolved = TRUE)
```

```
nrow(aligned$data)
ape::Ntip(aligned$tree)
```

reconcile_trees

Reconcile tip labels between two phylogenetic trees

Description

Compare the tip labels of two phylogenetic trees and report which species are shared, which differ only in formatting or synonymy, and which appear in only one of the two trees. Use this when assessing the impact of switching phylogenies (e.g., Jetz et al. 2012 vs Clements 2025) before deciding which tree to use in a downstream PCM.

Usage

```
reconcile_trees(
  tree1,
  tree2,
  authority = "col",
  rank = c("species", "subspecies"),
  overrides = NULL,
  db_version = NULL,
  fuzzy = FALSE,
  fuzzy_threshold = 0.9,
  resolve = c("flag", "first"),
  quiet = FALSE
)
```

Arguments

tree1	An ape::phylo object, or a character(1) path to a Newick/Nexus tree file.
tree2	An ape::phylo object, or a character(1) path to a Newick/Nexus tree file.
authority	A length-1 character vector, or NULL. Taxonomic authority used for synonym resolution (stage 3 of the cascade). One of: <ul style="list-style-type: none"> "col" (default) Catalogue of Life — broad, curated, frequently updated. A sensible default for most taxa. "itis" Integrated Taxonomic Information System — strong for North American vertebrates and plants. "gbif" Global Biodiversity Information Facility backbone. Wider coverage; includes more recent synonymy. "ncbi" NCBI Taxonomy — best when working with sequence data. "ott" Open Tree of Life synthetic taxonomy. Useful when your downstream phylogeny is from the Open Tree synthesis. "itis_test" A small bundled subset of ITIS, cached locally with taxadb for testing. Intended for examples and unit tests; not for analysis.

	<p>"gnverifier" HTTP-backed verification against ~100 sources via the Global Names verifier; no local database download. See vignette("getting-started") for the trade-off (wider coverage, requires network and the httr2 package).</p> <p>NULL Skip the synonym stage entirely. Useful for quick checks or when taxadb is unavailable. Stages 1, 2 and 4 still run.</p> <p>Five authority codes that earlier versions of the package advertised — "iucn", "tpl", "fb", "slb", "wd" — are no longer accepted. Empirical testing against taxadb v22.12 showed that iucn errors with a schema mismatch and the others are not taxadb providers at all. Passing one of those values now produces a helpful migration error.</p>
rank	<p>A length-1 character vector. Controls how trinomials are handled during normalisation:</p> <p>"species" (default) Strip infraspecific epithets so that "Parus major major" becomes "Parus major" before matching.</p> <p>"subspecies" Keep trinomials intact. Use this when your analysis operates at subspecies level.</p>
overrides	<p>Optional pre-built corrections. Either a data frame with at least columns name_x and name_y (plus an optional user_note column), or a file path to a CSV with the same columns. Any name listed here bypasses the cascade and is recorded as match_type = "manual". Useful for applying published crosswalks (see reconcile_crosswalk()) or for locking down decisions made in a previous run.</p>
db_version	<p>A length-1 character vector. taxadb database snapshot to use (e.g. "22.12"). NULL (default) uses the latest available.</p>
fuzzy	<p>Logical. Enables the fuzzy-matching stage when TRUE. Default FALSE. Turn this on to catch likely typos (<i>Corvus brachyrhynchos</i> -> <i>Corvus brachyrhynchos</i>). When FALSE, stages 1–3 still run.</p>
fuzzy_threshold	<p>Numeric in [0, 1]. Minimum genus-weighted similarity score for a fuzzy match to be accepted. Default 0.9 (roughly "no more than ~10% of characters differ"). Lower values (e.g. 0.7) are more permissive but produce more false positives; always review fuzzy matches with reconcile_suggest() or reconcile_review() before trusting them.</p>
resolve	<p>A length-1 character vector. What to do with borderline matches:</p> <p>"flag" (default) Mark low-confidence fuzzy matches (score below flag_threshold) and names with indirect taxadb synonymy as match_type = "flagged" so you can audit them with reconcile_review() or reconcile_suggest().</p> <p>"first" Accept the highest-scoring candidate silently, without flagging. Faster but riskier; use only when you have already reviewed the ambiguities.</p>
quiet	<p>Logical. Suppresses progress messages when TRUE. Default FALSE.</p>

Value

A [reconciliation](#) object with meta\$type == "tree_tree".

See Also

[reconcile_diff\(\)](#) to quantify gains/losses between two reconciliations; [reconcile_to_trees\(\)](#) when you want to match a single dataset against many trees at once.

Other reconciliation functions: [reconcile_apply\(\)](#), [reconcile_augment\(\)](#), [reconcile_crosswalk\(\)](#), [reconcile_data\(\)](#), [reconcile_diff\(\)](#), [reconcile_export\(\)](#), [reconcile_mapping\(\)](#), [reconcile_merge\(\)](#), [reconcile_multi\(\)](#), [reconcile_override\(\)](#), [reconcile_override_batch\(\)](#), [reconcile_plot\(\)](#), [reconcile_report\(\)](#), [reconcile_review\(\)](#), [reconcile_splits_lumps\(\)](#), [reconcile_suggest\(\)](#), [reconcile_summary\(\)](#), [reconcile_to_trees\(\)](#), [reconcile_tree\(\)](#)

Examples

```
data(tree_jet2)
data(tree_clements25)
rec <- reconcile_trees(tree_jet2, tree_clements25, authority = NULL)
rec
# How many tips are shared across both trees?
sum(reconcile_mapping(rec)$in_x & reconcile_mapping(rec)$in_y)
```

tree_clements25	<i>Clements 2025 phylogenetic tree (subset)</i>
-----------------	---

Description

A pruned version of the Clements 2025 taxonomy phylogenetic tree, containing ~850 species from the same families. Larger than [tree_jet2](#) because the Clements taxonomy recognises more species in these clades. Tip labels use underscores.

Usage

```
tree_clements25
```

Format

An object of class `phylo` (from the `ape` package).

Source

Clements et al. (2025) eBird/Clements Checklist of Birds of the World, v2025.

`tree_jet2`*Jetz (2012) phylogenetic tree (subset)*

Description

A pruned version of the BirdTree Stage 2 maximum clade credibility tree (Hackett backbone), containing ~660 species from the Corvoidea and allied passerine families. Deliberately smaller than `avonet_subset` (~920 species) so that reconciliation produces unresolved species suitable for `reconcile_augment()`. Tip labels use underscores.

Usage`tree_jet2`**Format**

An object of class `phylo` (from the `ape` package).

Source

Jetz et al. (2012) The global diversity of birds in space and time. *Nature* 491:444–448. doi:[10.1038/nature11631](https://doi.org/10.1038/nature11631)

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