

Casal2

Start 09:30 and finish at 11:00 NZ time (UTC + 13)



Agenda

1. Brief Introduction to Casal2 (NIWA)

- a. Current capabilities of Casal2 with example assessments
- b. Validation methods: Methods for internal testing and validation, e.g., unit tests, system tests

2. Where we are in the Casal2 development process

- a. Recent progress (Ocean Environmental & Zaita)
- b. Key items for development over the next 6 months (NIWA)

3. Engaging with Casal2 (NIWA)

- a. How to make contact
- b. How to get examples, make feature requests, document bugs, and solve problems
- c. How to develop new extensions/processes/observation classes
- d. Process for generating releases with new functionality

4. Future features (Open discussion)

- a. Desired features
- b. Funding



Introduction and examples



- CASAL has been a good stock assessment tool for New Zealand
 - But fixed to the 2000's view of assessment models, and new concepts impossible to implement
- Casal2 is the replacement for CASAL
- The aim was to keep CASAL's core features:
 - Have a common package that working groups and stakeholders know and trust
 - Easy to use with focus on assessment structure, not coding & testing
 - Manual to document how features work
 - Input files self-document assessments
 - Confidence in results by thorough testing of code
- Casal2 would also:
 - Be easily maintainable & expandable to new concepts, including coding techniques not available in 2000
 - Future-proof how stocks can be structured
 - Have a formal testing regime
- Casal2 was one of the 'next-generation' systems discussed at CAPAM^{1,2}

CAPAM = Center for the Advancement of Population Assessment Methodology

^{1.} Hoyle, S.D.; Maunder, M.N.; A'mar, Z.T. (2020). Frameworks for the next generation of general stock assessment models: Report of the 2019 CAPAM workshop. New Zealand Fisheries Assessment Report 2020/39. 80 p.

^{2.} André E. Punt, Alistair Dunn, Bjarki Þór Elvarsson, John Hampton, Simon D. Hoyle, Mark N. Maunder, Richard D. Methot, Anders Nielsen (2020). Essential features of the next-generation integrated fisheries stock assessment package: A perspective. Fisheries Research 229, https://doi.org/10.1016/i.fishres.2020.105617.

Who and how:

- NIWA funding, also Fisheries New Zealand funding at start, and 2021
- Current project manager(s) at NIWA Matt Dunn & Steven Holmes
- Software architect/developer Scott Rasmussen (Zaita Ltd)
- Technical development Alistair Dunn (Ocean Environmental Ltd), Teresa A'mar (NIWA), lan Doonan (NIWA), Craig Marsh (NIWA)
- A lot of the initial Casal2 code was transferred from SPM and CASAL

Partition: numbers-at-age by population strata

- Partition = "matrix" of population splits (rows) and ages (columns)
- Categories divide up the population
 - e.g., sex and/or area
- Each category can have one or more levels/factors
 - sex could have three factors: male, female, & unsexed
- Each row takes one factor from each category
 - Two categories: sex (male & female) and area (spawning & feeding)
 - → 4 rows: male.spawning female.spawning male.feeding female.feeding

Input file specifications:

```
@categories # Start of command block
format sex ## Single area population, 2 sexes # One category
names male female # Factors for sex = partition has 2 rows
```

- Population splits are generic
 - Casal2 has no "hard-wired" knowledge of what population categories and factors represent: meaning is user defined by the processes that are specified to operate on them
- Any population split can be conceptualised in the Casal2 partition
 - e.g., species
- To have meaning, there must be a process to operate on them
 - Otherwise a function must be coded for it, documented, and tested
 - Species can use currently available Casal2 processes
 - e.g., recruitment from within the species, fishing
 - To simultaneously catch two species in the same fishery, new code would have to be written

Input file specification

Input file consists of a series of command blocks

Each block specifies some aspect of the model structure or processes to act on the partition

"@" marks start of a command block

```
@model
                                        # Mandatory model setup block, e.g., year and age range to use
                                        # Sub-command: have one time step called "1"
time steps 1
                                        # Sub-commands
                                        # Defines what happens in time step "1"
@time step 1
processes Ageing Recruitment Fishing # Order of processes; specify block labels
                                        # Labels have no fishery meaning to Casal2
                                        # Each label has a corresponding @process block
## Ageing
@process Ageing
                                        # Define what the label "Ageing" does
                                        # Calls a function that shifts numbers along a row (age axis)
type
          ageing
                                        # Acts on these rows in the partition; "*" short hand for all rows
categories *
```

An example: Blue cod

Pot fishery + lapsed line fishery + recreational



[Casal2 only]

[Casal2 only]

- Data
 - CPUE series (drives results)
 - Pot surveys, but these are relatively recent (flat so relatively unimportant)
 - LF from commercial catch (retained + discards)
 - Age frequencies from the pot surveys and last few years of commercial catches
 - Catches from pot, line, & rec fisheries
- Features
 - Sensitivity with sex change (female → male)
 - Pots: time varying L50 based on legal size limits
 - three changes
 - To fit one length-based selectivity, needed growth morphs (3)
 - Retained & discarded catch components

- No new code needed
- Input file specs

```
#sex change
#
@categories
format
         sex
         male female
                              #one sex, one area stock structure
names
@time_step 1
            Ageing Recruitment sex change Fishing
processes
@process
           sex change
                                # lengths jump on transition
           transition_category # function that shift from one row to another
type
           female
from
           male
to
selectivities tranSex
                               # identify ogive label to control the transition
@selectivity tranSex
                                # Use capped logistic ogive
            logistic
type
a50
            2
                                # age 2 yrs = initial value
ato95
            5
                                # age at 95\% is 2 + 5 = 7 yrs
            0.1
                                # cap at 10% transitioning
alpha
```

Another example: Bluenose

- **Bluenose**; deep-water fish, long-lived, depleted stock.
- Age-based, Bayesian with MCMC parameter estimation.
- 112 years, 60 ages, two sexes, two areas with age-based migration.
- Base model fitted with 10 fisheries, 12 CPUE biomass indices, 6 length compositions, 12 age compositions, 49 average-weight compositions.
- Empirical length at age; logistic or domed fishery selectivity.
- Priors mostly uninformative.
- 11 parameters being estimated (constant YCS).



Example blocks

```
@derived_quantity SSB
type biomass
time_step fishery
categories male.background female.background male.features female.features
time_step_proportion 0.5
time_step_proportion_method weighted_sum
selectivities Maturation_male Maturation_female Maturation_male Maturation_female
```

Example blocks

```
@selectivity sel_trawl
type logistic
a50 16.4
ato95 10.4
```

@selectivity sel_bns7
type logistic
a50 13.2
ato95 4.9

@selectivity One
type constant
c 1.0

@selectivity migrate
type constant
c 0.029

Example blocks

- Much will be familiar to CASAL users.
- Greater flexibility.
- Maybe less "forgiving", than CASAL.

```
@observation CPUE northland 95to02
type biomass
time step fishery
time_step_proportion 0.5
categories male.features+female.features
catchability qnorthland 95to02
selectivities features features #sel northland sel northland
likelihood lognormal
process error 0.15
years
          1995 1996 1997 1998 1999 2000 2001 2002
table obs
1995
          1.162
                    0.084
1996
          1.245
                    0.093
1997
          1.397
                    0.086
          1.253
                    0.076
1998
1999
          0.894
                    0.051
          0.721
2000
                    0.04
          0.794
                    0.05
2001
2002
          0.771
                    0.053
end_table
```

@catchability qnorthland_95to02 type nuisance lower_bound 1e-8 upper bound 1e-3

Average-weight compositions

- Data from fish receivers.
- They record the weight and number of bluenose they sell, e.g., a box contained 10 fish that weighted 20.5 kg.
- Temporal and spatial coverage much greater than Ministry observers can achieve; average-weight data are "free".
- Casal2 had length and age compositions, weight composition class was added. Set up so weight compositions could be single fish, or average-weight data.
- The process was to (iteratively) develop the rationale, write the maths and the technical specification, then implement the observation code, add a unit test, and add a description of the functionality to the manual.
- We found average-weight data comes with "issues".

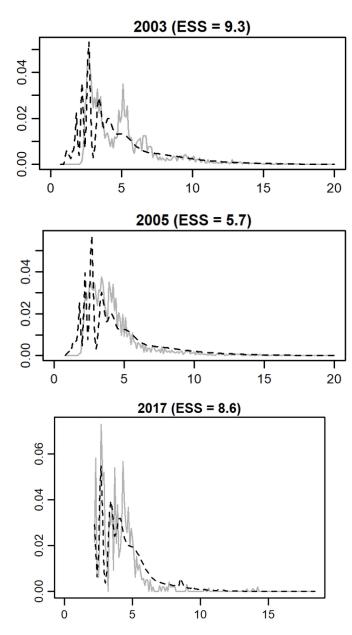


Figure 17: Bluenose observed weight frequency samples (grey lines) and base model MPD fits (black lines): Three examples from Figures 12–16 selected and magnified to show details of the fits. Top panel from Northland; middle panel from Bay of Plenty and East Cape; bottom panel from Other longline.

```
@observation Observed weight frequency features northland
type process removals by weight
method of removal BLL northland
time step fishery
mortality instantaneous process Instantaneous Mortality
likelihood multinomial
delta le-5
years 1998 1999 2001 2002 2003 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017
categories male.features+female.features
units kgs
length weight cv 0.2
length weight distribution lognormal
length bins
fishbox weight 12
weight bins 0.7 0.9
                                                                                          2.1
table obs
1998
1999
                                                                 0.00035 0.00339 0.00694 0.01433
#2000
2001
                                                                  0.00084 0.00557 0.0052 0.00743
                                         0.00046 0.00056 0
```

- Found average-weight data were naturally "spiky".
- The size range of fish being averaged in each pack was influential but was unknown.
- We had high hopes for these data, but their statistical properties were not fully understood before being used.
- Average weight compositions in Casal v1.1.0 and newer.

Testing and Validation



Testing and Validation

- Unit tests
- System tests
- Test Case functionality summary document
- 6 Test Case reports

Unit tests and system tests

- Unit tests
- Separate code to test specific functions and classes

- System tests
- 14 models which test specific groups of Casal2 functionality

Test Cases

- Validation of a set of common stock assessment model functionality
- Summary document in the Casal2 GitHub repository (in Documentation)
- Test_cases_and_functional_requirements_for_Casal2_v1.pdf

- 6 models based on existing CASAL assessments
- BCO, HAK, HOK, LIN, ORH, SBW
- Comparison of CASAL and Casal2 results
- 2 optimisers used in Casal2, BetaDiff (from CASAL) and ADOL-C

Functional requirements for the Test Cases for CASAL2 v1.0 6 August 2020

1. The Test Cases

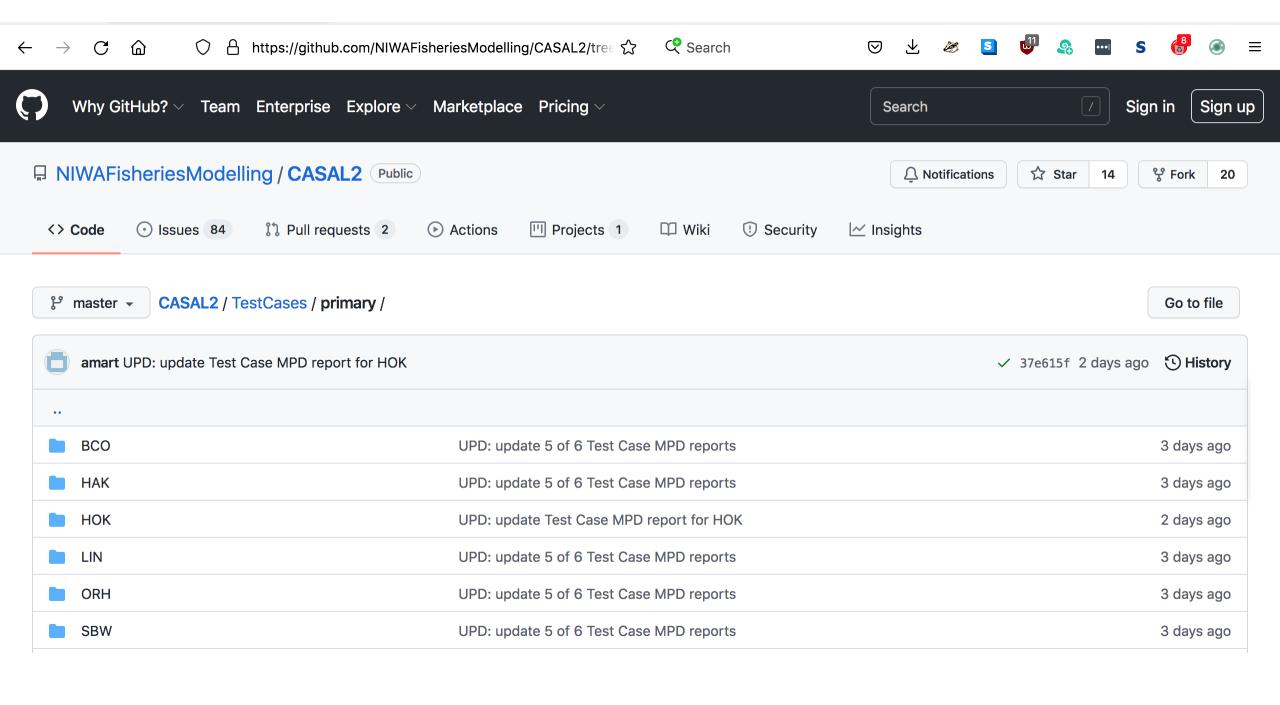
The test cases contain the minimum required functionality for Casal2 version 1.0, as defined by the Development Team. The test cases are based upon real stock assessments that were originally completed using CASAL. In most cases, the assumptions of those models were then modified to encompass the desired functionality; the test cases cannot therefore be compared with any published stock assessment.

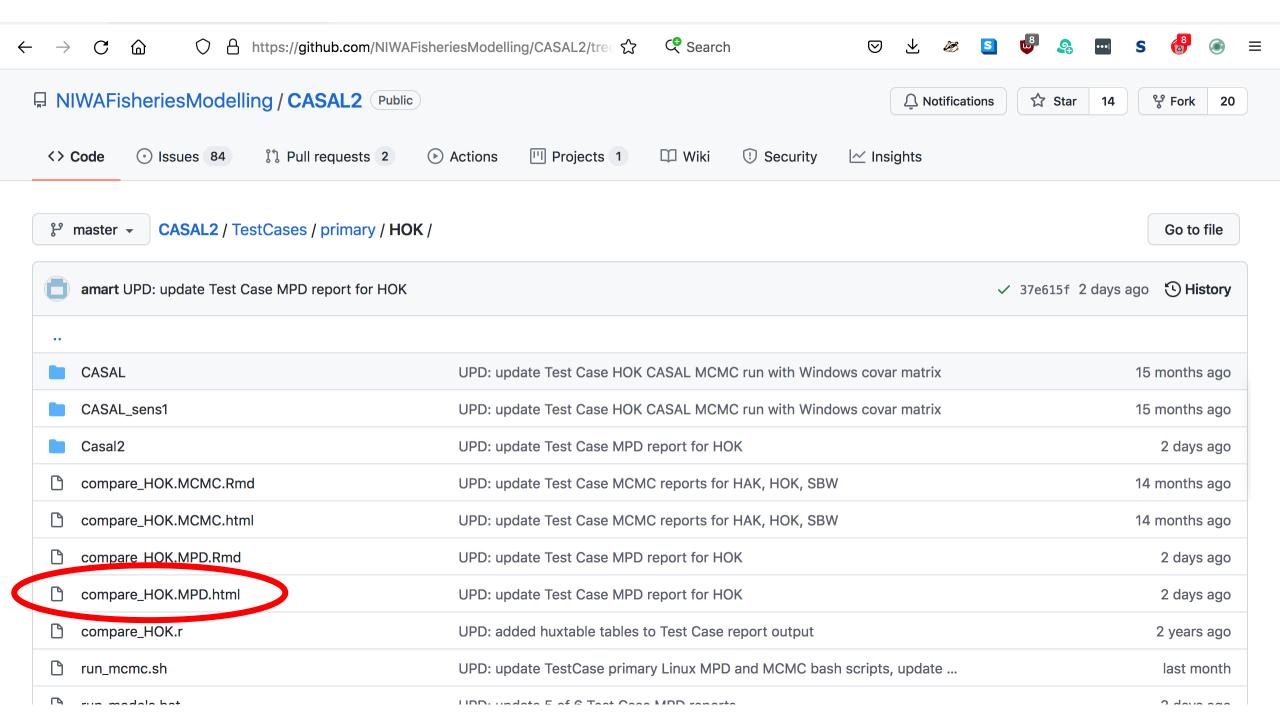
All of the test case stock assessment models are age-structured, although some of the observation data may be length-based. MPD results as well as MCMC results are compared.

We intend to add further test cases as they become available and as appropriate. All current test cases are New Zealand stocks.

- HOK is hoki.
- ORH is orange roughy on the Chatham Rise (subarea Andes seamount complex).
- LIN is ling in the sub-Antarctic region.
- BCO is blue cod around the south of the South Island.
- HAK is hake in the sub-Antarctic region.
- SBW is southern blue whiting in the sub-Antarctic region.

2. The models





Casal2 Test Case MPD comparisons for HOK

- 1 HOK comparison of CASAL and Casal2 model configurations
 - 1.1 HOK model characteristics
 - 1.2 R environment
 - 1.3 CASAL and Casal2 model output
 - 1.4 Tables
 - 1.5 Matching of outputs
 - 1.6 Plots

1 HOK comparison of CASAL and Casal2 model configurations

This document compares the results of at least 2 CASAL model configurations (base and at least one sensitivity) and up to 6 Casal2 model configurations (3 BetaDiff and 3 ADOL-C).

The CASAL model sensitivity 1 has a smaller minimisation tolerance value than the CASAL base model (1e-9 vs. 1e-6).

The Casal2 ADOL-C and BetaDiff low tolerance models have a smaller tolerance value than the CASAL base model (1e-9 vs. 1e-6).

1.1 HOK model characteristics

The main characteristics of the Test Case HOK (hoki) CASAL model are:

- one stock, ages 1 17
- one area, although many characteristics are separated into "east" and "west"
- years 1972 2018, projection years 2019 2023
- five time steps: Oct_Nov, Dec_Mar, Apr_Jun, End_Jun, and Jul_Sep
- five stock categories: west.sa, east.cr, west.cr, west.wc, and east.cs (labeled "stock.area")

compare_HOK.MPD.html

1.4 Tables

Tables of parameter estimates and objective function components for the CASAL and Casal2 model MPD results

CASAL parameter estimates

rownames	Base_Model Sensitivity_1		Percent_Diff	
q[CSacous].q	0.43120	0.43120	0.000	
q[WCacous].q	0.30030	0.30020	0.033	
q[CRsum].q	0.07431	0.07431	0.000	
q[SAsum].q	0.05925	0.05925	0.000	
q[SAaut].q	0.06717	0.06717	0.000	
relative_abundance[CRsumbio].cv_process_error	0.14050	0.14050	0.000	
relative_abundance[SAsumbio].cv_process_error	0.43060	0.43060	0.000	
log_B0_total	14.34000	14.34000	0.000	
B0_prop_stock1	0.32870	0.32870	0.000	
natural_mortality.all	0.29600	0.29600	0.000	
selectivity[Wspsl].shift_a	-0.21740	-0.21740	0.000	
recruitment[E].YCS1	0.44780	0.44780	0.000	

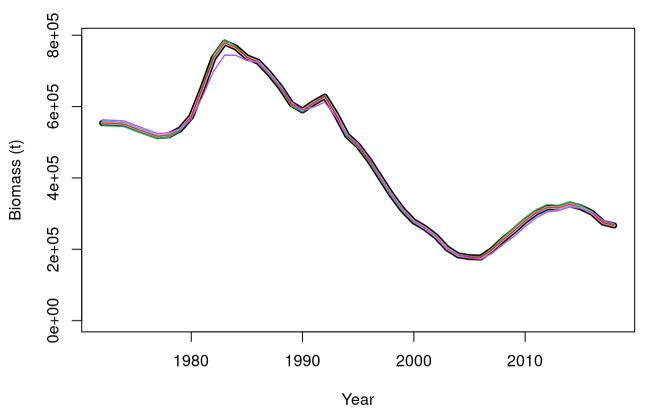
compare_HOK.MPD.html

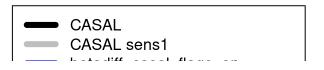
Casal2 parameter estimates

rownames	betadiff_casal_flags_on	betadiff_casal_flags_off	betadiff_casal_flags_on_low_tol	adolc_casal_flags_on	adolc_casal_flags_off	adolc_casal_flags_c
catchability[CSacous].q	0.42724	0.42786	0.43116	0.43829	0.43770	
catchability[WCacous].q	0.31284	0.31244	0.30024	0.27303	0.27856	
catchability[CRsum].q	0.06832	0.06812	0.07431	0.08044	0.07817	
catchability[SAsum].q	0.06717	0.06706	0.05925	0.04403	0.04676	
catchability[SAaut].q	0.07578	0.07563	0.06717	0.04760	0.05060	
observation[CRsumbio].process_error	0.14094	0.14089	0.14048	0.14956	0.14992	
observation[SAsumbio].process_error	0.42364	0.42381	0.43061	0.40906	0.40764	
process[recruit_E].b0	548395.00000	547497.00000	555125.00000	564399.00000	561440.00000	
process[recruit_W].b0	1082670.00000	1083360.00000	1133680.00000	1246900.00000	1220960.00000	
process[Instant_mortality].m{west.sa}	0.31271	0.31293	0.29598	0.26632	0.27151	
time_varying[shifted_mu].a	-0.22921	-0.22959	-0.21744	-0.17795	-0.17121	
process[recruit_E].ycs_values{1975}	0.44537	0.44590	0.44782	0.44226	0.44368	
process[recruit_E].ycs_values{1976}	0.72940	0.73052	0.72680	0.70501	0.70695	
process[recruit_E].ycs_values{1977}	0.79231	0.79333	0.78454	0.75637	0.75887	
process[recruit_E].ycs_values{1978}	1.38645	1.38827	1.36001	1.29318	1.30663	
process[recruit_E].ycs_values{1979}	1.00265	1.00372	0.98776	0.94780	0.95478	
process[recruit_E].ycs_values{1980}	0.33437	0.33462	0.32932	0.31728	0.31857	

compare_HOK.MPD.html

E SSB comparison





Recent progress



Background

- Recent Casal2 development had been delayed
 - Resource and people constraints
 - Some of the development had expanded the code base with partial development and testing of new ideas
 - Not fully implemented with partial testing and documentation
 - Some code had become obsolete with recent operating systems updates and changes (specifically on Linux)
 - User manual descriptions out of date and incomplete

Recent developments with Casal2

- Review and develop the list of aspects to resolve
- Updates and revisions to the Casal2 code base and the documentation
 - Identified a number of software inconsistencies and bugs in the code to ensure it operates correctly
 - Initial optimisation of the software code to improve the speed of model estimation and MCMCs
 - Incomplete functionality now mostly removed (or hidden)
 - Updated the user manual
- "Streamlining" the current code base to focus on important aspects

Resolve code inconsistencies and bugs

- Code updated to C++17
- Implemented an open-source build system
- Implemented thread-safe implementation of all code, and threading now available in some minimisers and MCMC algorithms
- Removed undocumented generation of reports etc., that caused crashes
- Cleaned the Python build scripts and supported new functionality
- Fixed functionality causing undefined behaviour and crashes
- Implemented a number of changes to improve speed and user interface
- Added and enhanced the test harness system to support creating threaded tests and to better allow running tests in different run modes

Usability updates

- Usability modifications
 - Command line and internal syntax improvements for consistency and usability
 - Standard and default reports
 - Improved error reporting and logging
- Improve the User Manual
 - Update the user manual with methods description sections
 - Update the syntax descriptions to match the underlying code

Upcoming developments



Upcoming developments (this FY):

- Automatic build and test for Windows and Linux with GitHub resources.
- Speed improvements
 - Memory use.
 - Re-working age-length-weight module.
 - Model improvements.
 - Test and validate parameter transformations.
- Refine and validate existing functionality
 - Projections.
 - Simulations.
- q ratio priors
 - A feature of CASAL.
 - Needed for orange roughy assessments (1st quarter 2022).
- Ongoing user documentation updates.
- Posterior predictive checks for MCMC diagnostics.

Engaging with Casal2



First Port of Call:

https://casal2.github.io/

Information for Casal2 Users and Developers

Casal2 is NIWA's next generation open-source integrated assessment tool for modelling the population dynamics of marine species, including fishery stock assessments. Casal2 expands functionality and increases maintainability relative to its predecessor. CASAL, Casal2 can be used for



Casal2 Code of Conduct

The Casal2 Code of Conduct

Casal2 releases for Windows and Linux

The Casal2 installation packages are available in the Casal2 GitHub repository.

The Casal2 release notes

The Casal2 project status

CASAL files for Windows and Linux

Files for CASAL, the predecessor of Casal2

First Port of Call (cont): https://casal2.github.io/

Casal2 User and Developer Support Forums

The Casal2 user and developer support forums are available on the Casal2 Discourse site.

Casal2 Contributor Guidelines

The Casal2 contributor guidelines

About Casal2

The Casal2 software implements a generalised age-structured population model that allows for a great deal of choice in specifying the population dynamics, parameter estimation, and model outputs. Casal2 is designed for flexibility. It can implement an age-structured model for a single population or multiple populations using user-defined categories such as area, sex, and maturity. These structural elements are generic and not predefined, and are easily constructed. Casal2 models can be used for a single







Discourse site: https://casal2.discourse.group/

all categories Categories Latest			+ New Topic
Category	Topics	Latest	
Casal2 Support For all questions and comments on Casal2 functionality, use, troubleshooting, etc.	4	▼ Welcome to the Casal2 Discourse forumread me	0 Nov '20
■ Test		Casal2 workshop in October 2021	0
Casal2 Development	7	■ Casal2 Announce	22h
For discussing Casal2 development: bugs, features, directions, performance, testing etc.		Casal2 workshop Casal2 Development	3
Casal2 Documentation	0		
For discussing Casal2 documentation: current e.g. user manual, contributor guidelines, and required.		object in a class is being used? for a given model run	0
Casal2 Announce	1	■ Casal2 Development	
Casal2 Announcements and News from the development team. Others can read and reply to posts, but not create new topics.		Practice creating my new topic	3 Apr 21
Uncategorized	2	1000	7,17121
Topics that don't need a category, or don't fit into any other existing category.		@report.type=m_p_d gives an error Casal2 Support	1 Feb 22
Site Feedback Discussion about this site, its organization, how it works, and how we can improve it.	0	Default residual options for report.type=observation Casal2 Development	1 Feb 22

Discourse site: https://casal2.discourse.group/

all categories ▶ Categories Latest			+	New Topic
Topic		Replies	Views	Activity
▼ Welcome to the Casal2 Discourse forumread me Welcome to the official forum for all news, support and discussion of Casal2. Information about Casal2 can be found here. By using this forum you agree to abide by the Casal2 Code of Conduct. Information from Discourse read more	Ones.	0	68	Nov '20
Casal2 workshop in October 2021 ■ Casal2 Announce	T	0	9	22h
Casal2 workshop ■ Casal2 Development	H	3	43	6d
Identify how an addressable primitive object in a class is being used? for a given model run Casal2 Development	C	0	21	7d
Practice creating my new topic ■ Test	(1) (2)	3	31	Apr 21
@report.type=m_p_d gives an error Casal2 Support	(1)	1	35	Feb 22
Default residual options for report.type=observation ■ Casal2 Development	₩ 🕕	1	37	Feb 22

If you forget the URLs: Type "NIWA Casal2" into Google and click on the first entry

Population modelling software



Click on this link to go to the io page



Casal2 is an advanced software package developed by NIWA for modelling the population dynamics of marine species.

Casal2 is NIWA's new integrated assessment tool for modelling population dynamics of marine species, including fishery stock assessments. Casal2 expands functionality and maintainability over its predecessor, CASAL. Casal2 can be used for quantitative assessments of marine populations, including fish, invertebrates, marine mammals and seabirds.

The NIWA Casal2 Development Team welcomes your contributions and feedback. Information about the use and development of Casal2 is available at https://casal2.github.io/ 2.

Click on this link to go to the Discourse page

CASAL

CASAL is maintained by the development team. CASAL software, documentation, example files, and R utility files are available on request. For more information, you can download the manual from: CASAL user manual (PDF 3.9 MB)

Contact us

For all enquiries and to find the latest news and conversations on Casal2, please visit our discourse site: https://casal2.discourse.group/latest @

To contribute:

https://casal2.github.io/

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Casal2 Contributor Guidelines

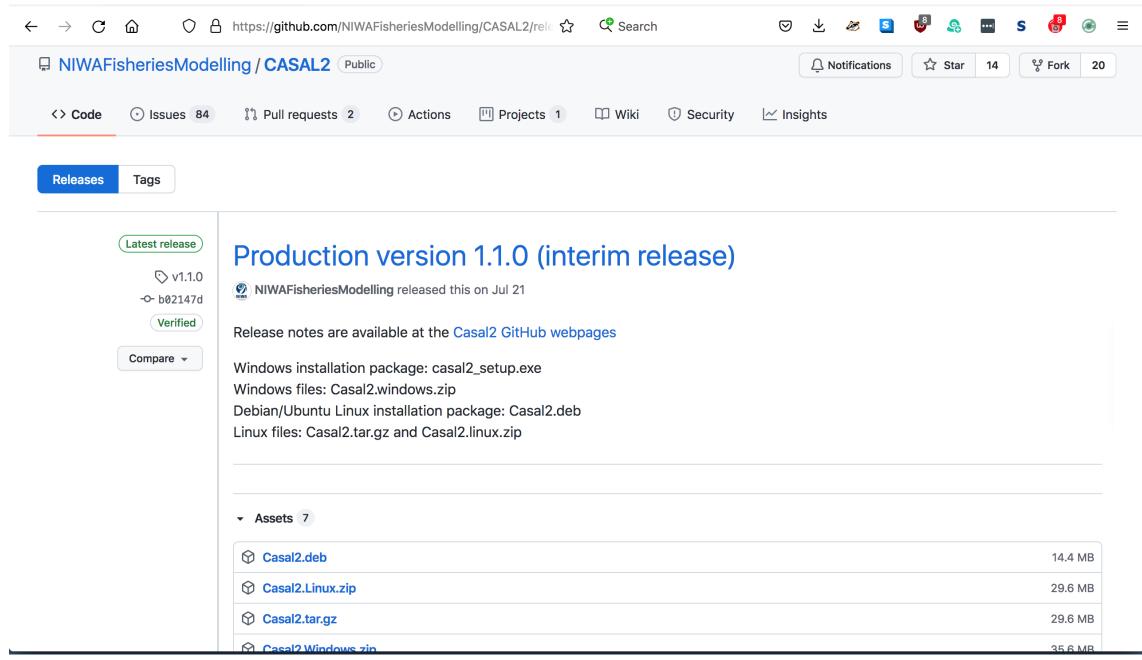
Start a discussion topic on the Casal2 Discourse site, write the documents, create GitHub issue(s), then work in git branches

All work in the NIWA Casal2 GitHub repository will be coordinated by the Casal2 Development Team and tracked using GitHub issues. Supporting documents can be attached to these issues. The changes will be managed in branches and integrated in pull requests.

Order of activities

- 1. Work with the Casal2 Development Team to create a GitHub issue with detailed task information and narrow scope
- Have the Casal2 Development Team create a branch to work on the issue in the format <topic area>_YYYYMM, e.g.,
 retention unit tests 201911
- 3. Review the issue and add the documents and additional information about the work to be performed
- 4. Comment regularly in the issue as work progresses about what decisions were made and why, problems or questions that arise and proposed solutions, requests for clarification, etc.
- 5. Create a pull request after completing the changes and passing the unit and system tests locally
- 6. Work with the Casal2 Development Team to review the changes
- 7. The Casal2 Development Team will merge the changes after the code review

Casal2 releases: https://github.com/NIWAFisheriesModelling/CASAL2/releases



Casal2 release notes: https://casal2.github.io/release_notes



Casal2

NIWA Casal2 User and Developer Support

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Casal2 Release Notes

Version 1.1.0, released 2021-07-21

This release is from the proportions_at_weight_202101 branch. This is an interim release, as the new observation class was used in the 2021 bluenose (BNS) stock assessment which used Casal2 and followed from this document.

This release contains a new observation class, ProcessRemovalsByWeight. The technical specification for this new observation class is in the Documentation/Enhancements subdirectory. The unit test and the R code that produced the values in the unit test are also in the repository.

Casal2 now outputs the covariance matrix from CppAD minimisation.

This release also updates the MPD reports for the Casal2 Test Cases. The Test Cases are 6 sets of age-based stock assessment models (labeled BCO, HAK, HOK, LIN, ORH, and SBW) that were constructed to include a commonly used subset of the existing functionality.

The Windows installation package for CASAL and the executables for Windows and Linux are in the TestCases/CASAL subdirectory.

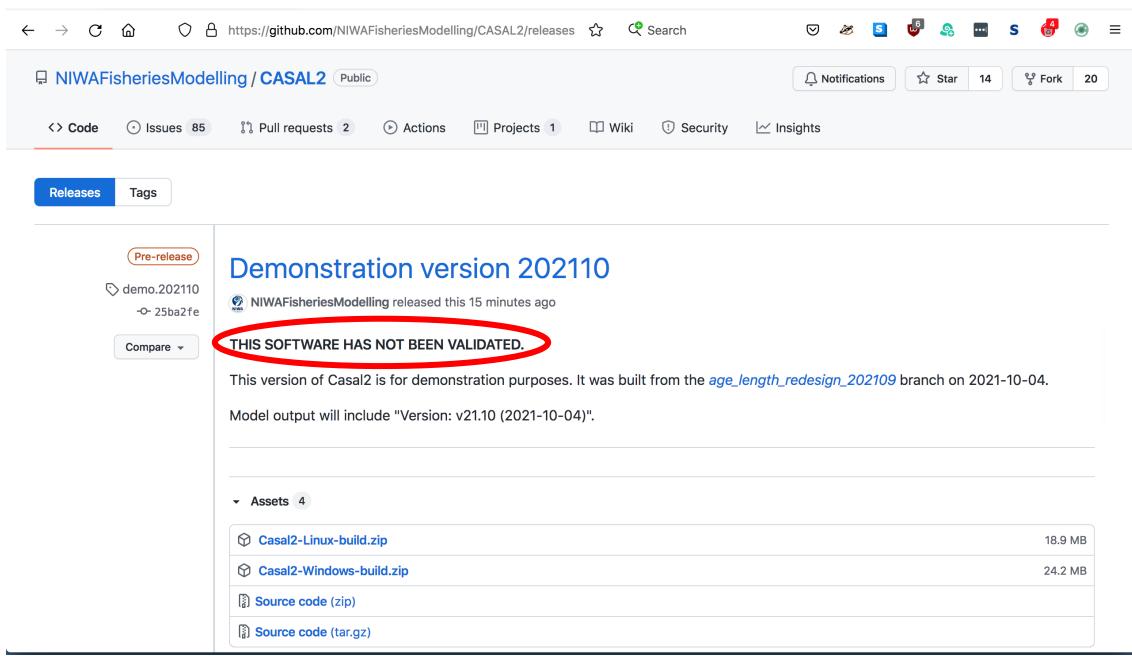
Known issues

The executables in this release have known efficiency issues.

The documentation in this release is not complete.

The simulation functionality has not been reviewed or tested.

Casal2 releases: https://github.com/NIWAFisheriesModelling/CASAL2/releases



Future features



Future features:

Ideas raised during open discussion:

- True length-based model (CASAL did this)
- Preference functions (or equivalent functionality implemented in Casal2)
- MICE application
- Close Kin Mark Recapture (CKMR)
- Tagging