Quarto template for the *Journal of Fish and Wildlife Management*

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To do:

* ☐ RAE Finish repo metadata, including readme, license, etc.
* ☐ AAA and MNF proof read and give your blessing to be co-authors
* ☐ MNF add in section on quart-utils
* ☐ MNF create figure 1

# Abstract

Scientists and resource managers increasingly use Markdown-based tools to create reports and manuscripts. We present a Quarto template for this journal in our article. We also provide a high-level overview for Quarto and other Markdown-based workflows as part of the document. Lastly, we provide examples of some features of the Quarto language that may be helpful for authors in this journal.

**Keywords:** Findability, Accessibility, Interoperability, and Reuse (FAIR); markdown; reproducible science; journal template; Quarto

# Introduction

Modern computing tools can allow scientists and practitioners to be more efficient, transparent, and reproducible (Erickson et al. 2021; Braga et al. 2023). For example, ecologists are moving away from point-and-click statistical methods to using scripting languages with code (Borregaard and Hart 2016). These changes not only make scientists more productive, but confer additional benefits. First, using scripting allows the ready reuse of methods by their creator. For example, scientists commonly conduct the same or similar analyses on a regular basis (such as U.S. Fish and Wildlife Service 2023a). Thus, scripting allows methods to be easily adapted and often quickly rerun with minimal formatting. Second, sharing the scripts allows others to reuse methods and also recreate results when data are shared as well. Third, scripting documents exactly what options were, or were not, selected for an analysis and data cleaning.

The broader scientific community increasingly has begun to see the importance of reproducible results because the perception of a “reproducibility crisis” exists by the majority of scientists surveyed across scientific fields (Baker 2016; Fanelli 2018). This lack reproducibility also occurs in natural resource fields. For example, ArchMiller et al. (2020) found only 17% of studies randomly selected from the *Journal of Wildlife Management* and the *Wildlife Society Bulletin* could have their analyses reproduced. Thus, scientists increasingly seek to produce reproducible results, especially for computationally intensive projects (Borregaard and Hart 2016).

Others have provided suggestions and methods for creating reproducible results in natural resource and related fields (Borregaard and Hart 2016; such as Braga et al. 2023). Additionally, Findability, Accessibility, Interoperability, and Reuse (commonly known as the acronym “FAIR”) principles exist to help scientists share and produce reproducible science (Reiser et al. 2018). Likewise, professional societies and government agencies have produced guidelines similar to FAIR for reproducible science. Table 1 of Erickson et al. (2021) lists example organizations including professional societies and governmental agencies.

Many scientists use scripting languages like Python or R for their statistical methods and analyses. For example, Erickson and Rattner (2020) found that a plurality of authors in an the journal *Environmental Toxicology and Chemistry* use the R computing language. However, we have observed that fewer scientists use similar tools for writing manuscripts even though scripting environments are now enriched with code-based manuscript services, such as Quarto, knitr, and Bookdown, which are primarily Markdown-based (Baumer and Udwin 2015) (Figure 1). Advantages cited for Markdown-based programs over direct typesetting products like LaTeX, Word, or Pages include simplicity, readability, transparency, and embedded computation (Baumer and Udwin 2015). Specifically, code-based manuscript writing can include the option to easily incorporate formatting from templates, ease of changing templates and reference formatting, automatic populating of references based upon Digital Object Identifiers (DOIs), and the ability to easily handle complex formulas (i.e., with embedded LaTeX). Furthermore, these writing tools can be especially powerful when embedded with code and/or data, which allows authors to create reproducible manuscripts that directly populate in-text tables and figures.

On a more personal note, we have observed interest in Markdown-based writing documents from our colleagues and collaborators who are natural resource managers or scientists supporting these managers, both in North America and globally. For example, a U.S. Geological Survey Markdown Community of Practice exists and all of the authors have presented tutorials to this group. Additionally, this group includes members from the U.S. Fish and Wildlife and other agencies in the U.S. Department of the Interior. We have also observed conversations about using Markdown-based writing tools in online conversations such as the U.S. Fish and Wildlife Service’s “Great Lakes R Working Group”.

For readers who unfamiliar with Markdown-based writings tools, we provide a brief history here. Stanford University computer scientist Donald Knuth had trouble typesetting his mathematical equations in the late-1970s and early-1980s and this led him to create the TeX language (Knuth 1984). Building upon TeX, Leslie Lamport create LaTeX as a set of macros to make TeX easier to use (Lamport 1985). Statisticians who used LaTeX sought to easily embed statistical code, results, and figures with LaTeX documents. Thus, to meet this need the program Sweave was created to “weave” S with LaTeX was created (at the time, many statisticians used the S-language, which is the language upon which R is base) (Leisch 2002). While brilliant in theory, we have observed that Tex, LaTeX, and Sweave all can be complicated to use and Sweave can be especially cumbersome to use because it requires the source file to be compiled multiple times for a single output. Tex, LaTeX, and Sweave may also difficult for natural resource scientists to learn, as they require new software and/or languages outside of the more common R or Python environments.

Others noted these difficulties as well and thus Yihui Xie and others created a Markdown-based program knitr for use with R, RMarkdown (Xie et al. 2018), that overcomes many of these limitations. Another offshoot is the ROxygen2 language, which allows users in the R environment to directly convert R scripts (rather than .Rmd) into RMarkdown, which is then “knit” to output formats such as html or Word. The broader R community received RMarkdown well (such as reviews by Baumer and Udwin 2015), but this language also has some limitations. Most notably, the language requires R and has some minor quirks. Both the popularity and limitations of RMarkdown led Yihui Xie and others to create a more general program that works natively with many languages rather than only R, Quarto (Allaire et al. 2022).

The remaining purpose of our paper is to present our Quarto template for this journal (Erickson et al. 2023). We will now demonstrate some useful features including how to include figures, tables, and the quarto-utils package for automatic bibliography generation. We also discuss how these tools may be applied to other situations. Although our examples tend focus on R, Quarto works with many languages including LaTeX (e.g., for embedding typeset equations), Python, and Julia (Figure 1).

# Methods

## Quarto workflow

Most readers of this article likely have used “what you see is what you get” (WYSWIG) point-and-click word processing programs such as Microsoft Word. Creating a Quarto document differs from creating a Word document because the author writes in Markdown syntax the words and code chunks that then must be rendered or complied to create the output file. Output files include formats such as Portable Document Format (pdf file endings; following ISO-32000), Microsoft Word Open XML Document (docx file ending; following ISO-29500), HyperText Markup Language (html file ending; following ISO-8859-1), or Microsoft PowerPoint. As part of the compilation step, intermediate files such as Markdown files (md) and LaTeX files (tex) may be created and either saved or deleted depending upon user settings. This tutorial focuses on Word document outputs because the *Journal of Fish and Wildlife Management* uses a Word-based workflow.

When writing a Quarto document, the first step is to create a quarto file that ends with .qmd extensions. Common editors that work with Quarto files include RStudio v2023.06 or newer (Posit team 2023) and VS Code (Microsoft 2023). RStudio also offers the benefits of including templates for journals articles, presentations, and other types of documents. Alternatively, you may use an existing Quarto file and edit that file. Erickson et al. (2023) hosts the Quarto file used to generate this article.

Within the Quarto file, the header contains metadata in a YAML-style format. The Quarto file for this article contains the following meta-data:

* The title for the manuscript.
* The author list.
* The date the file was last rendered.
* The output format options including the output type of docx, an option to set the figure captions location (fig-cap-location) to the bottom, an option to keep the LaTeX output files (keep-tex: true), and the Word file used as the style template for the file (reference-doc: jfwm\_template\_template.docx).
* The csl file used for style, for the *Journal of Fish and Wildlife Management*, this is the Council of Science Editors, author-date format (council-of-science-editors-author-date.csl)
* The name and location of the reference file (bibliography: references.bib)
* Code to include LaTeX-based headers (header-includes:) for double-spacing (\usepackage{setspace}\doublespacing) and line numbers (\usepackage{lineno} \linenumbers)
* Editor options (editor\_options) telling the Markdown editor (markdown) to use a soft line wrap after each sentence (wrap: sentence).

After the header, the user writes their manuscript using Markdown code with optional LaTeX code for equations. Code can be embedded within “chunks” that are defined by their language (e.g., r or python). These can either be displayed or hidden in the final document. References are added to the BibTeX file, either manually or using a script described later by pulling DOIs. Figures and tables can be added as needed, whether built locally with code chunks or called in from other sources. While writing, the author compiles the file to create a Word document (which also serves as a check for code mistakes that might prevent the Quarto document from compiling). The end result is a Word file that may be submitted to *Journal of Fish and Wildlife Management* with minimal manual formatting required.

## Background knowledge, tips, and other Quarto observations

Writing Quarto documents requires a basic knowledge of Markdown. The Quarto documentation (available at https://quarto.org/, accessed September 2023) contains tutorials to help people get started. Additionally, the Quarto document (Erickson et al. 2023) used to generate this document contains many examples for those who like to dive in and learn by example. Writing equations requires understanding some of the basics of LaTeX, but much less than writing entire documents in LaTeX.

As a general observation, when Quarto documents are rendered to Word documents, the Pandoc software (Dominici 2014) that renders the document is limited in outputs compared to HTML or PDF outputs due to technical reasons beyond the scope of this paper. Hence, some solutions readers may find using search engines will not work for this Word-based template. For example, cross-references for figures and tables do not work with this template. Additionally, readers familiar with Quarto may find some quirky examples in this file to help meet the *Journal of Fish and Wildlife Management* formatting style. For example, the authors’ name are all listed on one line rather than using multiple entries as one might expect in the metadata section.

Integrating code into Quarto documents also helps to create reproducible results. Code may be included directly within the file, or, R script files called into the Quarto file and “knit” into the final outputs using the read\_chunk() function from knitr package (Xie 2014). For example, a simple regression might be run or data plotted and then the outputs included the file. This ensures that manuscript always has the most recent results and statistics if the input files are changed. Additionally, code can be included inline with R (and is currently underdevelopment with Python, see https://github.com/quarto-dev/quarto-cli/pull/6190 accessed September 2023).

For example, when describing a study or writing a monitoring report, write “We observed many birds (*n* = 4,341) at the refuge with a mean of 184.7 birds per day.” With this example, inline code would allow these numbers to updated dynamically. Hence, if the authors updated their input numbers, the numbers in text would change. This change may occur because the authors update their data while writing a manuscript for a journal such as this, or, because the authors update their report on a regularly basis such as an annual monitoring program.

As another tip and quirk of using Quarto with word documents, consider using the flextable package in R (Gohel and Skintzos 2023) for creating tables rather than the other popular kable() function from the knitr package (Xie 2014) and kableExtra package (Zhu 2021) because the flextable package more readily allows tables to be formatted in Word-based outputs. For example, we demonstrate how the flextable package may be used to create tables with multiple columns and rows with Table 2. This table has multi-column headers and automatically drops duplicate row names. Both of these aesthetic features are commonly used by scientists when describing data and can be automatically created using using the flextable package in R.

Finally, to edit the style, change the jfwm\_template.docx file using Word rather than directly editing the output rendered from Quarto code. This may require you to become familiar with Word templates. For example, the *Journal of Fish and Wildlife Management* has the first paragraph of every section without indentation, but the second and subsequent paragraphs with a tab indent. Changing this required diving into the paragraph template settings in the template Word document. Further modifications can be done to change the template by updating the Style definitions (e.g., “Header 1” or “Body Text”) in the template document. These changes would then be shown on the output Quarto-based Word document after saving the template and rendering the .qmd.

## quarto-utils

Mike, please provide a one-three paragraph overview of the Quarto Utils package here.

# Results

We have demonstrated how to use Quarto to prepare manuscript for the *Journal of Fish and Wildlife Management*. This includes Figures (such as Figure 1) and tables (such as Table 1 and Table 2). We have also described the co-authors’ serendipitous connections to the Upper Midwest (Table 2).

# Discussion

Script-based writing programs such as Quarto offer advantages compared to traditional word processing program by allowing writers to focus on writing rather than formatting (Baumer and Udwin 2015). For example, scientist can easily change formatting if they need to change completion reports to journal articles or change formatting across journal articles because only style files need to be changed rather than reformatting the entire document. Additionally, reports that are completed and rerun on a regular basis can be formatted to automatically include numbers in the text to avoid tedious and error prone copying and pasting of values. When integrated with statistical programs such as Python or R and also publicly released, these programs also more readily support FAIR principles because the details (and code) necessary to recreate results are embedded within the Quarto document. The FAIR principles are increasingly becoming used by science agencies for conducting and documenting both research and monitoring programs. For example, the U.S. Geological Survey includes FAIR principles as part of their road map for science (Lightsom et al. 2022) and U.S. Fish and Wildlife Service planning also includes FAIR principles (U.S. Fish and Wildlife Service 2023b).

Thus, we created an example of how to prepare manuscripts in a Quarto document for the *Journal of Fish and Wildlife Management*. Besides directly helping potential authors in this journal, we also hope our publication will raise awareness for fish and wildlife managers about this tool. For example, many weekly, monthly, quarterly, annually, or similar interval reports would benefit from not only using a computer script to run the statistical analysis or other number crunching, but also in the document preparation itself. The example provided in Erickson et al. (2023) could also serve as a starting place for these documents as well.

# Conflict of Interest

The authors report no conflicts of interest.

# Acknowledgments

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# Data availability

The template code for the Quarto document used to create this article may be found at Erickson et al. (2023).

# Figures

|  |
| --- |
| Example of quarto workflow. |

# Tables

Table 1: Steps to use the Quarto template associated with this manuscript with the *Journal of Fish and Wildlife Management*.

| order | step |
| --- | --- |
| 1 | Obtain template from DOI |
| 2 | Write your text using Markdown |
| 3 (optional) | Run Python script to populate bibliography file |
| 4 | Break Quarto-Word link and do final formatting manually |
| 5 | Submit to \_Journal of Fish and Wildlife Management\_ |

Table 2: Author trivia to demonstrate a table. The table awkwardly includes wide and long form data to demonstrate how to use the flextable package.

|  | Minnesota Connection | | Wisconsin Academic Connection |
| --- | --- | --- | --- |
| Author | Intership | Undergraduate | University of Wisconsin (UW) System |
| RAE | University of Minnesota | -- | Undergraduate, UW-Stevens Point |
| -- | -- | Internship, UW-Madison |
| -- | -- | Graduate faculty, UW-La Crosse |
| AAA | University of Minnesota | Gustavus Adolphus | Graduate Certificate, UW-Madison |
| MNF | -- | Macalester | Graduate faculty, UW-Madison |

# Supplemental Material

**Supplement S1** U.S. Fish and Wildlife Service. 2023a. Waterfowl population status, 2023. U.S. Department of the Interior, Washington, D.C. USA.  
**Supplement S2** U.S. Fish and Wildlife Service. 2023b. Budget justifications and performance information fiscal year 2024. U.S. Department of the Interior, Washington, D.C. USA.

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