**Atlantic Surveys Species Lists Workshop 2022**

Since September 2020, the Gulf Region has been using *Another data entry system* (*Andes*) to capture information collected during the annual September multispecies bottom trawl survey in the southern Gulf of St. Lawrence. The data entry system has been adopted by Quebec and Maritimes Regions and is currently being considered by Newfoundland and Labrador Region.

Prior to the 2022 summer surveys, the species code and name list used to record captures by ANDES was modified to accommodate the needs of the different regions. While the list was appropriate for most captures, several issues surfaced after the surveys. These issues revealed themselves once the data in ANDES was processed for inclusion in each region’s data storing infrastructure (Oracle relational database management system). The challenge to date is that each Region works independently to prepare their survey’s name and code lists, with edits applied differently depending on awareness or history. Thus, the need to meet and consolidate our lists together, thereby ensuring conflicts for regional data needs are not impacted.

The objectives of this ANDES workshop are to:

* **Validate** aNorth Atlantic marine species name total checklist for ANDES
* **Enable** **regional** survey-specific lists in ANDES
* **Improving the effective display** of names and codes in ANDES

Holding this workshop is critical to ensuring that the upcoming winter survey conducted jointly by the Gulf and Quebec regions in the Gulf of St. Lawrence and the Georges Bank survey conducted by the Maritimes Region do not repeat into the species data issues that surfaced in 2022. As such, it is proposed to hold this workshop soon, ideally in December 2022 at the Gulf Fisheries Centre.

Note: the purpose is to improve the use of ANDES, and not for general discussion on species names or data management.

All Regions would be invited, though given the specific focus of the workshop, it might be expected that Newfoundland and Labrador, Pacific, Ontario & Prairie regions would only participate remotely by Teams.

Proposed attendance:

Gulf Region

* François-Étienne Sylvain, biologist in charge of ecosystem surveys
* David Fishman, data manager
* Pablo Vergara, data manager
* Daniel Ricard, stock assessment biologist

Quebec Region

* Brian Boivin, responsible for ANDES on winter and summer survey
* Hugo Bourdages, responsible for winter and summer survey
* Claude Nozères, DFO Species Names co-chair
* David Sean, developer for a coastal survey ANDES
* Caroline Vanier, data specialist for species names

Maritimes Region

* Ryan Martin, biologist in charge of ecosystem surveys
* Mike McMahon, data specialist
* Javier Murillo-Perez, species names specialist

Newfoundland and Labrador Region

* Andrew Cuff
* Fran Mowbray
* Carolyn Miri

Optional:

Aquatic Arctic Research Division, Ontario & Prairie Region

* Margaret Treble (Eastern Arctic surveys)
* Ashley Ehrman (Western Arctic surveys)

Pacific Region

* Maria Cornthwaite, groundfish surveys
* Shelee Hamilton, DFO species names co-chair

**Proposed Agenda**

Day 1 – Name and code lists

* Species names – understanding sources and authorities (1 hr)
  + How to use and interpret results from WoRMS
* Non-taxonomic terms – consolidating use across regions (1 hr)
  + Leveraging existing standards to display terms
    - *DarwinCore* for comments, types, notes
* Presenting the merged list for Atlantic, with subsets by region (2 hr)
  + Work begun before workshop—to be completed and approved
* Maintaining the Atlantic list – synonyms and updates (1 hr)
  + Automation and manual reviews

Day 2 – Programming and Display in ANDES

Regional specific name lists

* Displaying preferred species (normally occurring in area)
* How to consult or add when needed from total Atlantic list
* How to manage or create new codes for species or groups

Display of related information to a species, for example:

* Synonyms (older names found in books)
* Common regional names
* Classification hierarchy
* Flags or alerts for special (rare or difficult) species
* Flags or alert if species occurring in unexpected habitat (depth)
* Map of other recorded occurrences
* Wildcard searching (propose results using any part of name)

**Products:**

* Publish checklists
  + GitHub (e.g., <https://github.com/claudenozeres/Taxon-IML> )
    - Atlantic (main)
    - Regions (branches)
  + ChecklistBank (<https://www.checklistbank.org/> )
  + DFO National databases
* Publish report or article (e.g., Checklist as a Data Paper: <https://bdj.pensoft.net/>)
* Give a summary presentation for each region
* Provide a Best Practices summary for survey users of ANDES

**Follow-up:**

Propose half-day meetings in spring (post-winter survey) and fall (post-summer surveys) to 1) update name lists on Git and 2) review their functioning in ANDES.