

Design goals, technical implementation and practical use of Another data entry system (Andes)

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Science Branch
Gulf Region
Fisheries and Oceans Canada
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Canadian Technical Report of Fisheries and Aquatic Sciences

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ABSTRACT

Ricard, D., Fishman, D., Beazley, L., Pauley, K., Bernier, D., Boivin, B., Emberley, J., Martin, R., McDermid, J. and Rolland, N. 2022. Design goals, technical implementation and practical use of Another data entry system (Andes). Can. Tech. Rep. Fish. Aquat. Sci. nnn: vii + 18 p.

A data entry system to facilitate the capture of information collected during scientific activities conducted by DFO Gulf Region was developed. Another data entry system (Andes) was implemented as a browser-based environment that facilitates its deployment in a variety of data capture scenarios. The design goals and implementation details of Andes are described, and a number of usage cases are presented. To promote endorsement of Andes by other scientific groups and to ensure the pereniality of the project, the application relies on Open Source software and uses a shared code development platform.

RÉSUMÉ

Ricard, D., Fishman, D., Beazley, L., Pauley, K., Bernier, D., Boivin, B., Emberley, J., Martin, R., McDermid, J. and Rolland, N. 2022. Design goals, technical implementation and practical use of Another data entry system (Andes). Can. Tech. Rep. Fish. Aquat. Sci. nnn: vii + 18 p.

Un système d'entrée de données pour faciliter la saisie des informations recueillies lors des activités scientifiques menées par la Région du Golfe du MPO a été développé. Another data entry system (Andes) a été mis en œuvre en tant qu'environnement basé sur un navigateur qui facilite son déploiement dans une variété de scénarios de saisie de données. Les objectifs de conception et les détails de mise en œuvre d'Andes sont décrits, et un certain nombre de cas d'utilisation sont présentés. Pour promouvoir l'utilisation d'Andes par d'autres groupes scientifiques et assurer la pérennité du projet, l'application s'appuie sur des logiciels Open Source et utilise une plate-forme de développement de code partagé.

1 Introduction

Scientific activities conducted by Fisheries and Oceans Gulf Region include ecosystem surveys and port sampling activities. These monitoring programs require the collection of a variety of information about marine ecosystems and about commercial fishery activities. To support the data collection during ecosystem surveys, a paper-based system was initially used on board research vessels. With the advent of computing capabilities, the paper data sheets were digitized and the information was stored for subsequent analyses. In the 1980s, a data entry system was created by DFO to allow for the direct entry of data in digital format. The Groundfish Survey Entry (GSE) system was used during research cruises from the mid 1980s until the deployment of its successor, the Ecosystem Survey Entry (ESE) system in the early 2000s. Both systems were Microsoft Access applications.

While the (ESE) is a highly functional system, it also poses some limitations:

- Despite being used over a local area network (LAN), the system is not designed to work in a networked configuration.
- The interface of the system currently does not support for multiple locales, meaning that it is a unilingual tool.
- Visual Basic for Applications (VBA), the main development framework used to build the application, is a deprecated programming language and is no longer supported by Microsoft (REF NEEDED). To adapt the software using modern libraries and Application Programming Interfaces (API) in (VBA) will become increasingly difficult over time.
- The use of a version control system (VCS) is incompatible with MS Access. The absence of a VCS presents serious challenges for managing, disseminating and troubleshooting versions of an application across multiple platforms and is a major impediment for a collaborative approach to development.

Furthermore, the lack of a true server-side application (e.g., web application) meant agile development was effectively impossible; especially in the context of a mission that was underway. While the status quo was meeting the immediate data capture needs of scientists, a proactive stance towards addressing the above spurred the development of **Another data entry system** (Andes). This project began during the summer of 2018, the first field deployment on Andes took place in the fall of 2019 during the southern Gulf of St. Lawrence September survey, where it was piloted in parallel to the (ESE) on board *CCGS Teleost*.

The Québec region follows a similar timeline. Many survey teams use a deprecated Visual Basic Application that connects to a mission-specific Microsoft Access database. Their technicians often have to resort to pen and paper to perform activities unsupported by the application. In some cases, the complete surveys are performed in this manner. The use of various entry methods such as Microsoft Excel, paper, and a legacy application have been reported by these teams. These data later have to be manually consolidated which is time consuming and error prone. Interest in modernizing the tooling and workflow has been expressed. This imminent need, together with the successful proof-of-concept demonstration of Andes in the Gulf region, presents an opportunity for inter-regional collaboration.

The Shrimp Ecosystem Survey application resulted from the early adoption of Andes in the Québec region. The niche workflow requirements of shrimp survey operations justified the creation of the its own Andes application. After two test years, the pilot project recently made its successful debut as the main input tool of a survey mission. Onboarding efforts for coastal surveys (scallop, sea cucumber, whelk) has already begun. This has lead to close interregional collaboration and presents new challenges: meeting niche regional requirements in Andes.

A growing user-base that wish to add functional requirements can lead to a bad system design. This is especially true when affecting software components having different maturity levels. Development patterns such as contractual work specifically focused on adding a niche feature can easily lead to the accumulation of technical debt.

Andes does not currently have a well-defined governing body. This makes it, as well as any project without governance, vulnerable. To alleviate this situation, we ask that this technical document as well as the developer's guide be considered when outsourcing development efforts. This will ensure that the core vision is maintained and that software sustainability principles are upheld.

Andes reached a critical point in its lifecycle. It has been used as the main data entry strategy in numerous missions over the span of a few years. Although new features can always be added, its core functional requirements can now be locked-in. The boundaries can are now well-defined and will be described in this report.

This report documents the design principles that guided the development of Andes, provides technical details about its implementation and details the usage cases encountered thus far. It provide guidelines for assessing the suitability of Andes for novel applications (e.g., other field activities and sampling programs) and discuss the ways in which this system could gain further adoption within DFO.

2 Methods

The ESE was the starting point in the development of Andes. The data entry software had to first replicate the capabilities of the ESE. Early version of Andes achieved those goals and the system was further developed over its usage by scientists in the Gulf Region.

2.1

Andes is meant to log activity on a Mission basis, i.e., it is configured and deployed for a particular mission. The requirements for that mission are configured by an Andes lead prior to deployment. The Mission ## Usage cases

2.1.1 Deployment

2.1.2 Andes preparation

A user, such as an Andes lead must set the stage before Andes is deployed for a Mission. Typically this will require defining i) a Configuration Preset for Andes (configuration for a particular deployment); ii) the Mission parameters (name, vessel, institute, date, personnel, sampling protocol, etc); and/or iii) a Sampling Protocol to use when there is no mission (i.e., for \gls{Port Sampling}).

Configuration preset Mission Set management

2.1.3 Ecosystem survey data entry

The Andes system is designed to be deployed as the main data entry platform for survey operations. The Ecosystem Survey application is the main entryptpoint that technicians will use to input survey data.

This application is meant for usage in a wet laboratory (Figure 3). It allows the capture of all the information required by the sampling protocols of the survey.

This is a command

Catch table, Basket Specimen Observation Flag Complete Specimen Fishing event

2.1.4 Oceanographic metadata collection

Biological surveys often collect complementary oceanographic data. Coordinating these data with the associated biological data is a burdensome logistical challenge. Historically, the

different types of data were captured and recorded using separate systems that operated in complete isolation from one another. The original intent of the Oceanographic module of Andes was to streamline the capture of oceanographic data and to simplify its association with the corresponding biological data. The Oceanographic module has since been evolving into a stand-alone component of the application that is capable of being deployed independently of the Ecosystem Survey module.

2.1.5 Commercial sort sampling

Another use of the software is to support data collection during sampling of commercial port sampling activities. (Benoît and Daigle 2007)

2.2 Technical implementation of design principles

The following section outlines the design principles that played a role in decision-making and provide a description of how they were implemented in the project.

2.2.1 Flexibility, scalability and reliability

Within the context of DFO Science, there is a high number of use-cases under which this application will be deployed. For example, the number of users might range from a single user to several dozen. Similarly, the application might sometimes be used in a networked setting while other times used in the field on a stand-alone tablet. Accordingly, the application has to accommodate a wide range of practical scenarios.

The [Django Web Framework](#) was selected for the backend of this application due to its modularize nature; virtually all aspects of the framework can be decoupled. Furthermore, the Django framework is written in pure Python; an open-sourced, generalized object-orientated programming language that is popular for use in data-heavy applications. While web applications are most often used over a network, the django library comes with a development web-server that permits users to serve and use the application locally. In this scenario, a single computer acts simultaneously as server and client. While there are important limitations to the use of the django development web-server in a full-scale production environment, this configuration is adequate for the stand-alone use-cases referred to above.

2.2.2 Version Control / Source Control

The utilization of a version control system (VCS) is an indispensable component of a modern day development workflow. Version management is especially important in the context of having concurrent instances of the application in production at a given time. Knowing the version of a production instance is necessary to resolve any issues that might arise. Similarly, databases and backup files are intimately linked to an application's version number. In order to successfully

re-instantiate a backup file, the precise version under which it was produced must be known. The VCS will also provide an indispensable framework for the coordination, examination and integration of contributions from collaborators.

It was decided to use [Git](#) as the VCS for this project due to the fact that it is both widespread in use and open-sourced. The remote repository for this project is currently hosted on the [Gulf Science organizational GitHub account](#). The project is additionally making use of GitHub infrastructure including, pull requests, issue management (e.g., bugs, feature requests and general enhancement requests) and security alerts.

2.2.3 Unit testing

The application also needs to be reliable especially considering its use in the field setting. The implementation of unit tests is a practical way to ensure the maintenance of functionality over time. On one extreme, the addition of any code can be preceded by the creation of unit tests (i.e., test-driven development). This approach will maximize the stability of an application but can hinder the momentum of a project, especially in its early stages. On the other extreme, application development in the complete absence of unit testing occurs at a relatively fast pace but will result in a project that is vulnerable to breaking in unexpected ways and one that is difficult to maintain and pass on to other developers.

Using the built-in Python / Django testing framework, this project will seek to employ a middle ground between the above two approached. While the goal is not to implement test-driven development, the use of unit tests are highly encourages, especially to back up the core functionality of the application.

2.2.4 User-defined protocols

The flexibility of project leads to design, modify and report on their sampling protocol without depending on developers is very important.

2.2.5 User Interface

By ensuring the application has a modern and intuitive interface, the barriers related to onboarding new users are significantly reduced. Furthermore, an intuitive interface will reduce the need for extensive help documentation. Wherever extra annotation is required, documentation will be inserted directly in the application in the form of tool tips and help bubbles. By appealing to the end users' intuitions and by providing in-situ help documentation, we reduce the likelihood fields and features being used incorrectly.

The above was achieved by building the frontend of the application in HTML 5, javascript and CSS. Most users will be familiar with the flow and functionality of a web browser and will be comfortable navigating and entering data into a website. Facilitated by the Django model and form classes, all controls (i.e., fields) on the website will contain verbose descriptions and help

text. The [Bootstrap v5.0](#) css and javascript libraries were utilized in order to give the application a sleek, modern look and to ensure compatibility with different types of devices (e.g., personal computers vs. tablets vs. mobile devices). The Bootstrap library also provides palatable styles for displaying help text in the form of popovers and tooltips.

2.2.6 Reactivity

In the context of being on a research vessel survey, data entry happens at a very fast rate; often with multiple transactions per second. Accordingly, it is imperative that the application does not create a bottleneck for data entry and is able to keep pace with experienced technicians. The usage of a reactive javascript library in conjunction with an API would allow data entry to occur without webpages having to constantly refresh.

The [Django REST framework](#) was used to construct the WebAPI component of the application. The project took a hybrid approach, combining the use of standard Django views and [Vue.js](#) frontend applications embedded in the templates. The latter were built to avoid the need for constantly reloading webpages and to keep optimize the flow of traffic across the network. Reactive javascript frontend applications also provide a better experience from the point of view of an end-user.

2.2.7 Multilingualism

Allowing users to utilize the application in the language of their choice is of considerable importance to this project. Previous tools that have been used were uni-lingual and this by itself would have limited the scope of their use in a national context. The Django framework has excellent support for internationalization and localization, including the translation of text and the formatting of dates, times and numbers. It achieves this using a system of “hooks” used by developers to indicate which parts of the code should be localized. See [Django - Internationalization and localization](#) for more details on this process. In our application, an end-user can toggle between English and French by simply clicking on a button. In this way, each client can view the application in the language of their choice.

2.2.8 Backup Regime and infrastructure

- Backup are automatically created when sets are closed
- All backup files reference the version of the application which produced them. Even old backups can be loaded by locally re-instantiating the version of the application under which it was produced

3 Results

3.1 User definitions and permissions

Andes provides access to its different components differently based on the credentials of users. While the chief scientist can change sampling requirements for the mission, other users won't.

3.2 Ecosystem survey app

This component of Andes replicates the capabilities of the ESE for capturing detailed information on length, weight, ageing material, maturity, etc. about fish and invertebrate specimens.

3.2.1 App used in the laboratory

The app running on computers in the wet laboratory of the vessel is used for all entry of data related to measurements and observations of marine organisms.

3.2.2 App used in the bridge

The console to be used by navigation officers is meant to run on a tablet in the bridge of the vessel conducting the survey.

This console contains two separate sections: 1) the Set Card section and 2) the Fishing section.

Additionally, a number of events that take place during fishing can be captured in the console.

Information coming from Scanmar sensors are captured and stored by ANDES.

3.2.3 Forecasting tool

Part of the task-specific suite of utilities is a forecasting tool that provides real-time prognostics of survey completion targets based on assumed transit speeds and time spent fishing and processing the trawl catches.

3.2.4 Progress map

Another task-specific utility is the completion map which shows what strata have been completed based on target and minimum number of sets per stratum.

3.2.5 Reporting capabilities

Two types of reports are available for Andes: 1) reports meant to be used during field activities and 2) reports meant to be used after field activities are completed.

3.3 Shrimp ecosystem survey app

Quebec: Denis and Brian could contribute here?

3.4 Oceanography app

The oceanography data collection is handled by a separate app that is used in the deployment of the rosette and the processing of water samples obtained at different depths.

3.5 Cruise dashboard

This utility is meant to obtain a summary of the cruise, it includes the current position and speed of the vessel, the list of the most recent catches in the wet laboratory, as well as running totals of specimens captured.

3.6 Port sampling app

Andes was adapted to support port sampling activities where technicians obtain length frequency samples from commercial fishing activities. To facilitate deployment, the port sampling app of Andes is deployed on field tablets with a custom interface that is suitable for use on boats, outdoor and in inclement weather conditions (Figure 4).

3.7 Tasks for administrative user

Prior to a survey, a number of configurations must be done for Andes to function as intended. At a minimum, the following information must be ingested by Andes in order for a mission to take place:

1. Strata polygons
2. List of stations
3. Species list
4. Sampling requirements

3.8 Backup regime and infrastructure

3.8.1 Unit Tests

A number of unit tests have been created for the application.

3.9 Data models

Simplified Entity Relationship Diagrams (ERD) of the following components:

3.9.1 Sampling Protocols

3.9.2 Ecosystem Survey

3.9.3 Port Sampling

3.9.4 Oceanography

3.9.5 Integration with navigation system and trawl sensors

Full ERD on Figure 1

3.9.6 Collaborative development

- translations were done in house
- they must be up-kept along with development
- at the time of writing this document, the project has a total of 6 contributor to the code.

3.10 Deployment Checklist

Here is a deployment checklist for deploying an instance of the Andes application in a production environment:

- ☐ It is always a good practice to set the `DEBUG` setting to `False`. Using `DEBUG` in production can result in memory leakage. The debug setting is set via the project's `.env` file, located in the andes root directory (e.g. `/opt/andes_root/andes/.env`)
- ☐ Set Andes Leads and Chief Scientists to Admin users.
- ☐ Make sure GPS is working on site
- ☐ Make sure printer is working on site
- ☐ Make sure the backup works
- ☐ Make sure custom maps are working (if applicable)
- ☐ Check everything again after a reboot of the server
- ☐ Make sure you can run shell scripts from the front end (optional)
- ☐ Alderbarren setup
- ☐ Reset the Specimen table autoincrement (see [basic_setup](#))
- ☐ If using cradlepoint, has web filtering been turned on?
- ☐ Check to make sure that the time/date on any clients (especially Bridge clients) are in sync with server time

4 Discussion

The current capabilities of Andes have evolved over the last three years where the system has been used to support field activities in the Gulf Region. The software has also been used by the Maritimes and Quebec regions of DFO.

Versioning details and why the backup process is so awesome.

Things will change.

4.1 Creation and maintenance of unit tests

4.2 Integration of Andes with existing data repositories

Discuss the steps required to go from data collected in Andes to transferring them to existing databases.

4.3 Future Directions

- AZMP / Oceanographic Surveys
- use for ecosystem surveys by multiple DFO regions
- use of barcodes and/or QR codes for identifying and tracking down samples (e.g. otoliths, tissue samples, ...)

5 Acknowledgments

6 Figures

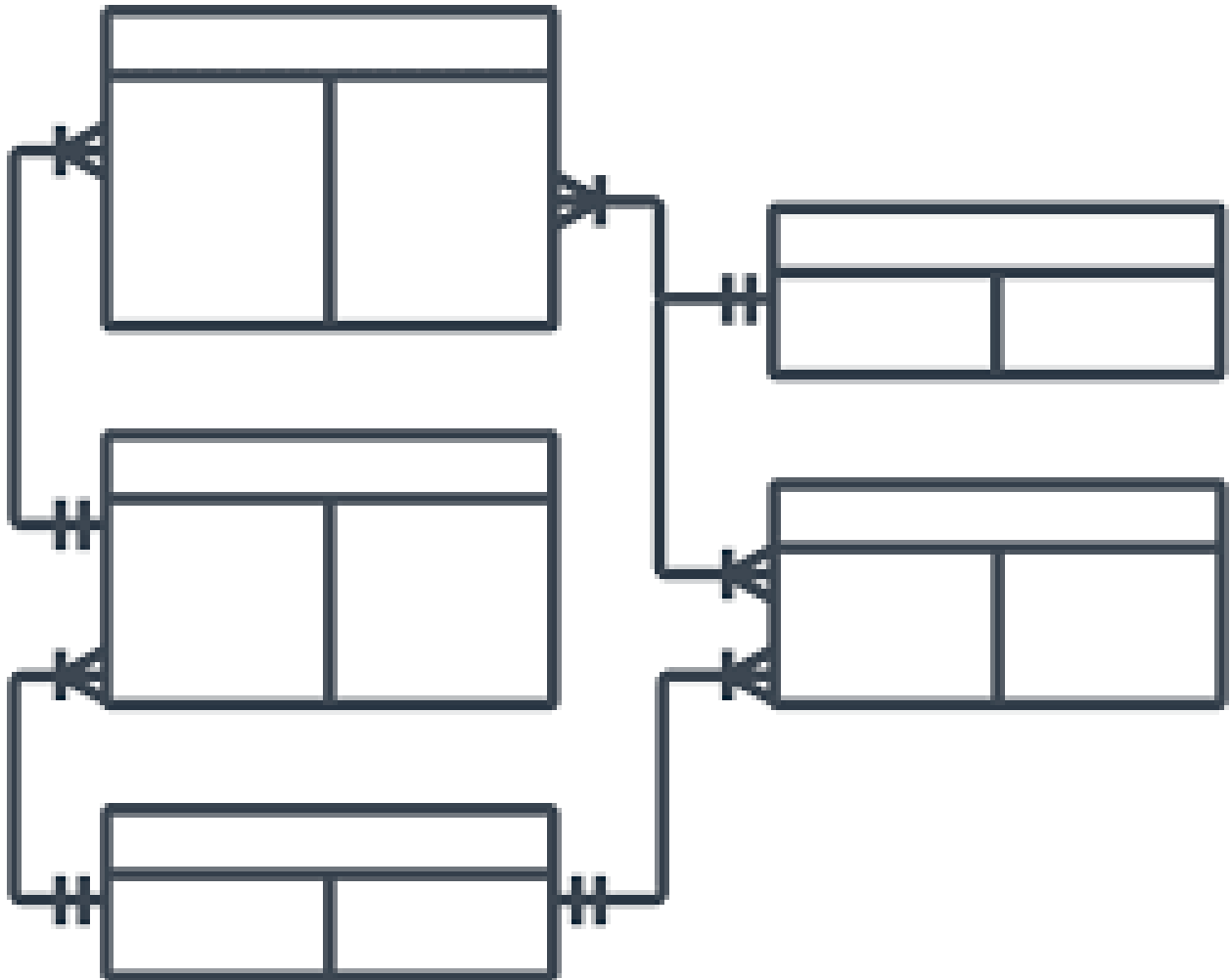


Figure 1. Entity relationship diagram of the data model used by ANDES.

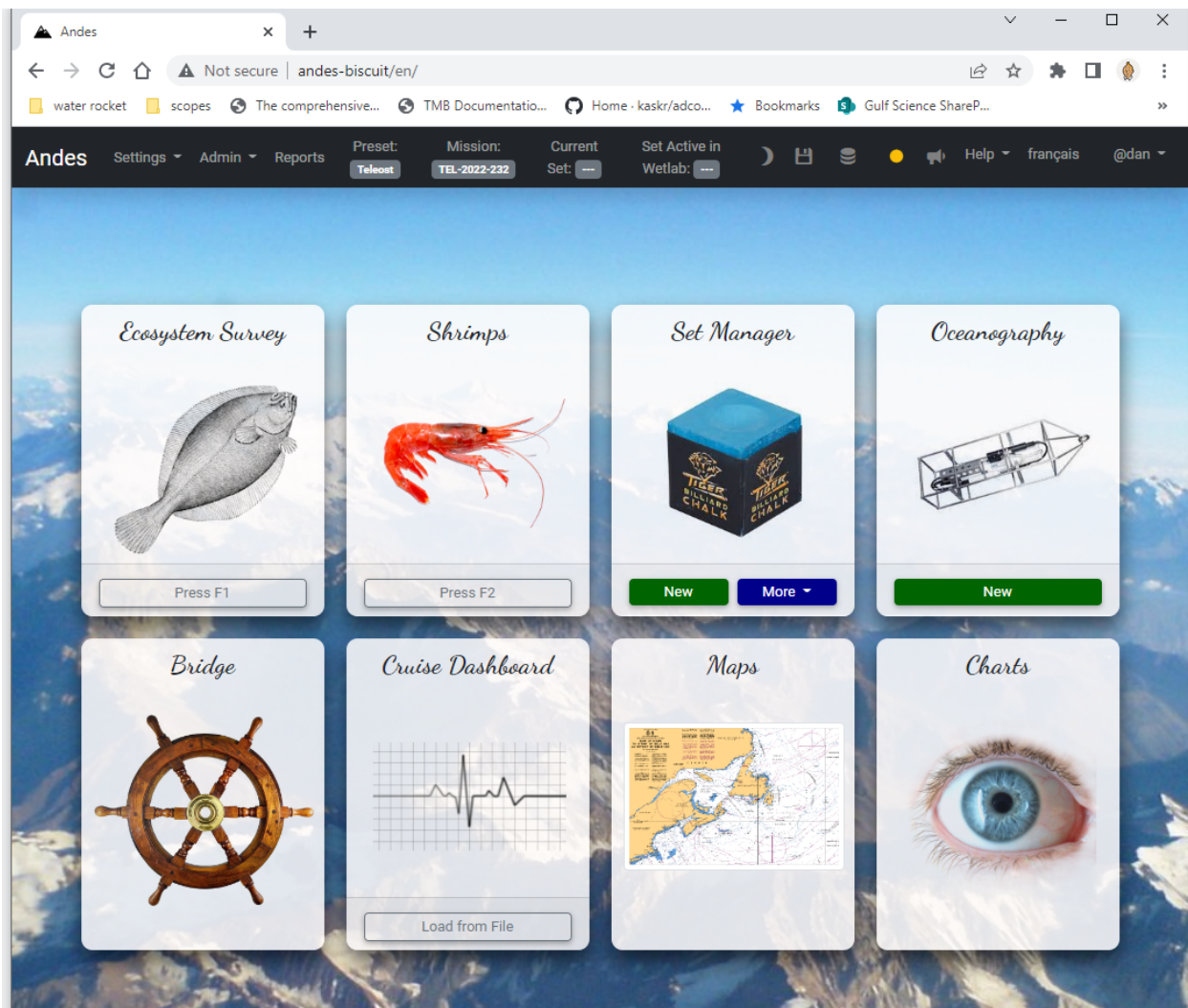


Figure 2. User interface of Another data entry system (Andes) showing the eight principal components of the application.

Andes - Data Entry

Not secure | andes-biscuit/en/ecosystem-survey/baskets/652/data-entry/

water rocket scopes The comprehensive... TMB Documentatio... Home · kaskr/adco... Bookmarks Gulf Science ShareP...

Active / Capelin / Observations

Previous F4 Stats F4 Comment F8 Print F12 Delete F3 New PgDn List F1 Refresh F5 Back Esc

Capelin – *Mallotus villosus* (64)

Set 1 || Station 219 || Stratum 419

Specimen #113 (Size Class 2) → Andes ID 498

Ctrl-Delete → delete an observation

Complete!!

Length cm – round up to the nearest whole – Fork length

Collections:

Standard

Fields: Length, Weight

Quota: 1 per cm, per set.

Is applicable for specimen? No

Figure 3. User interface of the Ecosystem Survey component of Andes when in use for processing samples in the wet laboratory. The screen capture presented here shows sampling of capelin lengths on an active set being processed in the lab.

Andes
Settings
Admin
Preset: GFC
Active Protocol: Herring NB
Help
français
@dave

Select a size (cm)

Delete Mode
View Summary
Manual Mode

5	5.5	6	6.5	7	7.5	8	8.5	9	9.5 1
10	10.5 1	11	11.5	12	12.5 1	13	13.5	14	14.5
15	15.5	16 1	16.5 1	17 2	17.5 1	18 1	18.5 1	19 1	19.5 1
20 1	20.5 2	21 5	21.5 5	22 6	22.5 3	23 4	23.5 4	24 4	24.5 3
25 3	25.5 3	26 2	26.5 3	27 2	27.5 2	28 1	28.5 1	29 1	29.5 1
30 1	30.5 1	31 1	31.5	32	32.5	33	33.5	34	34.5
35	35.5	36	36.5	37	37.5	38	38.5 2	39	39.5
40	40.5	41	41.5	42	42.5	43	43.5	44	44.5
45	45.5	46	46.5	47	47.5	48	48.5	49	49.5
50									

MEASURED: 73 / KEPT: 52

Back to Sample

Figure 4. User interface of the Port sampling component of Andes when in use for processing samples in the field.

APPENDIX A Glossary

Andes lead A person with a functional understanding of the inner workings of Andes. This person has the knowledge and user-rights that permit them to configure a Mission, define a Protocol, Sampling Requirements, etc..

Bridge The Bridge app is meant to be used by a winch operator (normaly a crewmember). The operator inputs winch operations (eg.,net/warp deployed/recovered) or actions (eg., net on/off bottom) directly to Andes via the Bridge app. .

Catch A table of the Ecosystem Surveys app. A Catch table contains a link to Set and Species entries, as well as an optional: speciment count, unweighted baskets, relative abundance category and an invertabrate catch ratio. Catches can be subdivided into sub-catches having a parent-children relationship. .

Catch Card Not sure yet, I think it's related to species and how they are measured/detailed .

Closed Set An Open Set Can be closed if the data it contains (eg, from Catch Card) does not trigger a Set Flag. .

Configuration Preset Configuration for a particular deployment scenario. Configuration presets include details on the backup locations, and peripherals like GPS, sonars, label printers, etc. .

Cruise Same as Mission.

Current Set The Set that is currently occuring in time. It has begun and is not finished. There can only be one Current Set at a time. .

Ecosystem Survey The Ecosystem Survey app is used to as the main data input interface. .

ESE Ecosystem Survey Entry.

Fishing Event An event related to fishing activty of Set. Metadata such as GPS coordinates and time to are associated with the following event types: *net deployed*, *doors deployed*, *warp deployed*, *net on bottom*, *haul back*, *net off bottom*, *door recovered*, *net recovered*, and *aborted*. A Set may contain a list of such event types. The Fishing Events are added to the Set by a crewmember using the Bridge application. .

GSE Groundfish Survey Entry.

LAN Local Area Network.

Mission Same as Cruise .

Open Set A Set that has not been closed. All new Sets will start in an open state and will remain so untill closed. Sets that are activated will automatically be opened. The Current Set is always open. .

Port Sampling TODO.

Protocol TODO.

Sampling Requirements TODO.

Sampling Protocol TODO.

Set A Set contains all fishing activity and sampling results for a particular Station. .

Set Flag A flag used to indicate that the data contained within the set has failed to pass a specific validation tests. Closing an Open Set with active flags can be done by overriding the validation mechanism.

Species TODO.

Station A target coordinate where .

VBA Visual Basic for Applications.

7 References

Benoît, H.P., and Daigle, D. 2007. Procedures for commercial catch sampling of finfish and shrimp in the southern Gulf of St. Lawrence. Can. Manuscr. Rep. Fish. Aquat. Sci. 2833: iv + 63 p.