

Tourmaline: A containerized workflow for rapid and iterable amplicon sequence analysis using QIIME 2 and Snakemake

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Abstract

Background: Amplicon sequencing (metabarcoding) is a common method to survey diversity of environmental communities whereby a single genetic locus is amplified and sequenced from the DNA of whole or partial organisms, organismal traces (e.g., skin, mucus, feces), or microbes in an environmental sample. Several software packages exist for analyzing amplicon data, among which QIIME 2 has emerged as a popular option because of its broad functionality, plugin architecture, provenance tracking, and interactive visualizations. However, each new analysis requires the user to keep track of input and output file names, parameters, and commands; this lack of automation and standardization is inefficient and creates barriers to meta-analysis and sharing of results.

Findings: We developed Tourmaline, a Python-based workflow that implements QIIME 2 and is built using the Snakemake workflow management system. Starting from a configuration file that defines parameters and input files—a reference database, a sample metadata file, and a manifest or archive of FASTQ sequences—it uses QIIME 2 to run either the DADA2 or Deblur denoising algorithm; assigns taxonomy to the resulting representative sequences; performs analyses of taxonomic, alpha, and beta diversity; and generates an HTML report summarizing and linking to the output files. Features include support for multiple cores, automatic determination of trimming parameters using quality scores, representative sequence filtering (taxonomy, length, abundance, prevalence, or ID), support for multiple taxonomic classification and sequence alignment methods, outlier detection, and automated initialization of a new analysis using previous settings. The workflow runs natively on Linux and macOS or via a Docker container. We ran Tourmaline on a 16S ribosomal RNA amplicon data set from Lake Erie surface water, showing its utility for parameter optimization and the ability to easily view interactive visualizations through the HTML report, QIIME 2 viewer, and R- and Python-based Jupyter notebooks.

Conclusion: Automated workflows like Tourmaline enable rapid analysis of environmental amplicon data, decreasing the time from data generation to actionable results. Tourmaline is available for download at github.com/aomlomics/tourmaline.

Keywords: amplicon sequencing, metabarcoding, environmental DNA, eDNA, microbiome, meta-analysis

Background

Earth's environments are teeming with environmental DNA (eDNA): free and cellular genetic material from whole microorganisms [1, 2] or remnants of larger macroorganisms [3, 4]. This eDNA can be collected, extracted, and sequenced to reveal the identities and functions of the organisms that produced it. Amplicon sequencing (metabarcoding), whereby a short genomic region is amplified and sequenced using polymerase chain reaction (PCR) from an environmental or experimental community's eDNA, is a popular method for measuring taxonomic diversity of microbiomes and environmental samples [3, 5, 6]. PCR primers have been used to generate amplicons of the bacterial 16S ribosomal RNA (rRNA) gene in studies of human and animal-associated microbiota [7–9], as well as environmental microbiota [2, 10]. Other regions that are commonly targeted include the fungal internal transcribed spacer (ITS) regions between rRNA genes [11], the 18S

rRNA gene of eukaryotes [12], the mitochondrial cytochrome oxidase I (COI) gene of invertebrate and vertebrate eDNA [13], and the mitochondrial 12S rRNA gene of fish [14]. Information gained from amplicon metabarcoding has far-reaching implications for human health (e.g., microbiome research), ecosystem function and conservation, and resource management [15, 16].

Computational workflows (pipelines) that run on local or networked computing resources or in the cloud have emerged as useful approaches to execute extended bioinformatics analyses [17]. Workflows wrap multiple tools and commands into a much smaller number of commands, with parameters often specified in a configuration file. Ideally, workflows allow for less time and effort spent on each separate analysis (i.e., scalability) and more reproducibility between analyses. Because workflows allow multiple data sets to be analyzed in parallel with standardized parameters, they provide opportunities for improved meta-analysis of micro-

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biome or eDNA data sets [18–20]. Some of the amplicon workflows that have been developed are Anacapa [21, 22], Banzai [23], PEMA [24, 25], nf-core/ampliseq [26, 27], Cascabel [28, 29], dada2 [30, 31], CoMA [32], ASAP 2 [33, 34], and tagseq [35]. Note here that we do not consider amplicon analysis packages like QIIME 2 [36, 37], MOTHUR [38], or OBITools [39] to be workflows, although they are very useful. Indeed, we believe that the most efficient workflows would take advantage of these existing packages and their built-in features. The abovementioned workflows have many excellent features, as compared previously [25], but none of them possesses all of the features that might be desired in a single workflow.

The ideal amplicon sequence analysis workflow, in our view, would build upon a modern amplicon analysis package, with advanced data formats, interactive visualization capabilities, and extensibility. QIIME 2, with its built-in provenance tracking, archive format, interactive visualizations, multiple interfaces including a Python API, and extensible plugin architecture, has become a popular package and is our package of choice. QIIME 2 supports DADA2 [40] and Deblur [41] plugins for denoising amplicon sequence data. The ideal amplicon workflow would also be built on a modern workflow management system to promote scalability and reproducibility. Snakemake [42] is a popular workflow management system in the bioinformatics community that manages input and output files in a defined directory structure, with commands defined in a Snakefile as “rules” and parameters and initial input files set by the user in a configuration file. Snakemake ensures that only the commands required for requested output files not yet generated are run, saving time and computation when rerunning part of a workflow. The ideal workflow would take advantage of the defined directory structure through downstream analysis capabilities like Jupyter notebooks for analysis and meta-analysis and support for parameter optimization. Outputs would be summarized with summary plots and tables, and all outputs would be presented in a single report (e.g., HTML) that could be shared with collaborators. Use of the workflow would be simplified by providing a containerized installation to enable deployment on multiple platforms while avoiding dependency issues. Finally, the workflow would provide clear step-by-step instructions with a tutorial using a small test data set.

Here, we present Tourmaline [43], an amplicon analysis pipeline that uses Snakemake to run QIIME 2 commands for core analysis and interactive visualization—plus workflow-specific commands that generate an HTML report of output and summary tables and figures of data and metadata—with rapid analysis aided by workflow iterability and scalability, support for multiple cores, a Docker container, and a detailed tutorial. After cloning the initial Tourmaline directory from GitHub and setting up the input files and parameters, only a few simple shell commands are required to execute the Tourmaline workflow. Outputs are stored in a defined directory structure that is the same for every Tourmaline run, facilitating data exploration, parameter optimization, downstream analysis, and meta-analysis across studies. Because of this defined directory structure, different runs that utilize different parameters (e.g., DADA2 truncation lengths) can be easily compared, facilitated by a helper script that makes a new copy of the Tourmaline directory from an existing one. Every Tourmaline run produces an HTML report containing a summary of metadata and outputs, with links to web-viewable QIIME 2 visualization files; the report facilitates evaluation of metadata (e.g., compliance with standards) and output (e.g., statistics about representative sequences and feature tables). A zipped run directory can be shared with collaborators, and relative links in the report are preserved, facilitating data exploration by experts and nonex-

perts alike. QIIME 2 artifact files can be fed directly into provided Python- and R-based Jupyter notebooks. In addition to running natively on Mac and Linux platforms, Tourmaline can be run in any computing environment using Docker containers. In this article, we describe the Tourmaline workflow and apply it to a downsampled 16S rRNA gene data set from surface waters of Western Lake Erie. The tutorial includes guidance on evaluating output to refine parameters for the workflow and showcases the HTML report, interactive visualizations, and Jupyter notebooks for biological insight into amplicon data sets.

Findings

Workflow

Overview

Tourmaline is a Snakemake-based bioinformatics workflow that operates in a defined directory structure (Fig. 1). Installation involves installing QIIME 2 and other dependencies or installing the Docker container. The starting directory structure is then cloned directly from GitHub and is built out through Snakemake commands, defined as “rules” in *Snakefile*. Tourmaline provides 7 high-level “pseudo-rules” for each of DADA2 paired-end, DADA2 single-end, and Deblur (single-end), running denoising and taxonomic and diversity analyses via QIIME 2 and other programs, encompassing commonly used analyses in eDNA/microbiome research. For each type of processing, there are 4 steps: (i) the *denoise* rule imports FASTQ data and runs denoising, generating a feature table and representative sequences; (ii) the *taxonomy* rule assigns taxonomy to representative sequences; (iii) the *diversity* rule does representative sequence curation, core diversity analyses, and alpha and beta group significance; and (iv) the *report* rule generates an HTML report of the metadata, inputs, outputs, and parameters. Steps 2–4 have 2 modes each, *unfiltered* and *filtered*, thus making 7 pseudo-rules total. The difference between the *unfiltered* and *filtered* commands is that in the *taxonomy_filtered* command, undesired taxonomic groups or individual sequences from the representative sequences and feature table are filtered (removed). The *diversity* and *report* rules are identical for *unfiltered* and *filtered* commands, except the outputs go into separate subdirectories. In addition to the 21 pseudo-rules (3 denoising methods with 7 pseudo-rules each), there are 47 regular rules defined in *Snakefile* that perform the actual QIIME 2, Python, and shell commands of the workflow (Supplementary Fig. S1).

Test data set

Tourmaline comes with a test data set of 16S rRNA gene (bacteria/archaea) amplicon data from surface waters of Western Lake Erie in summer 2018 (see Methods). The sequence data were subsampled to 1,000 sequences per sample to allow the entire workflow to run in ~10 minutes. This test data set is used throughout the article to demonstrate the capabilities of Tourmaline.

Documentation

Full instructions for using the Tourmaline workflow, including installation, cloning, and editing the config file, are described in the Tourmaline Wiki at [44]. Some experience with the command line, QIIME 2, and Snakemake is helpful to use Tourmaline; basic tutorials for each of these are provided at [45].

Installation

The workflow requires QIIME 2 (version 2021.2) plus several dependencies, which can be installed natively in a Conda environ-

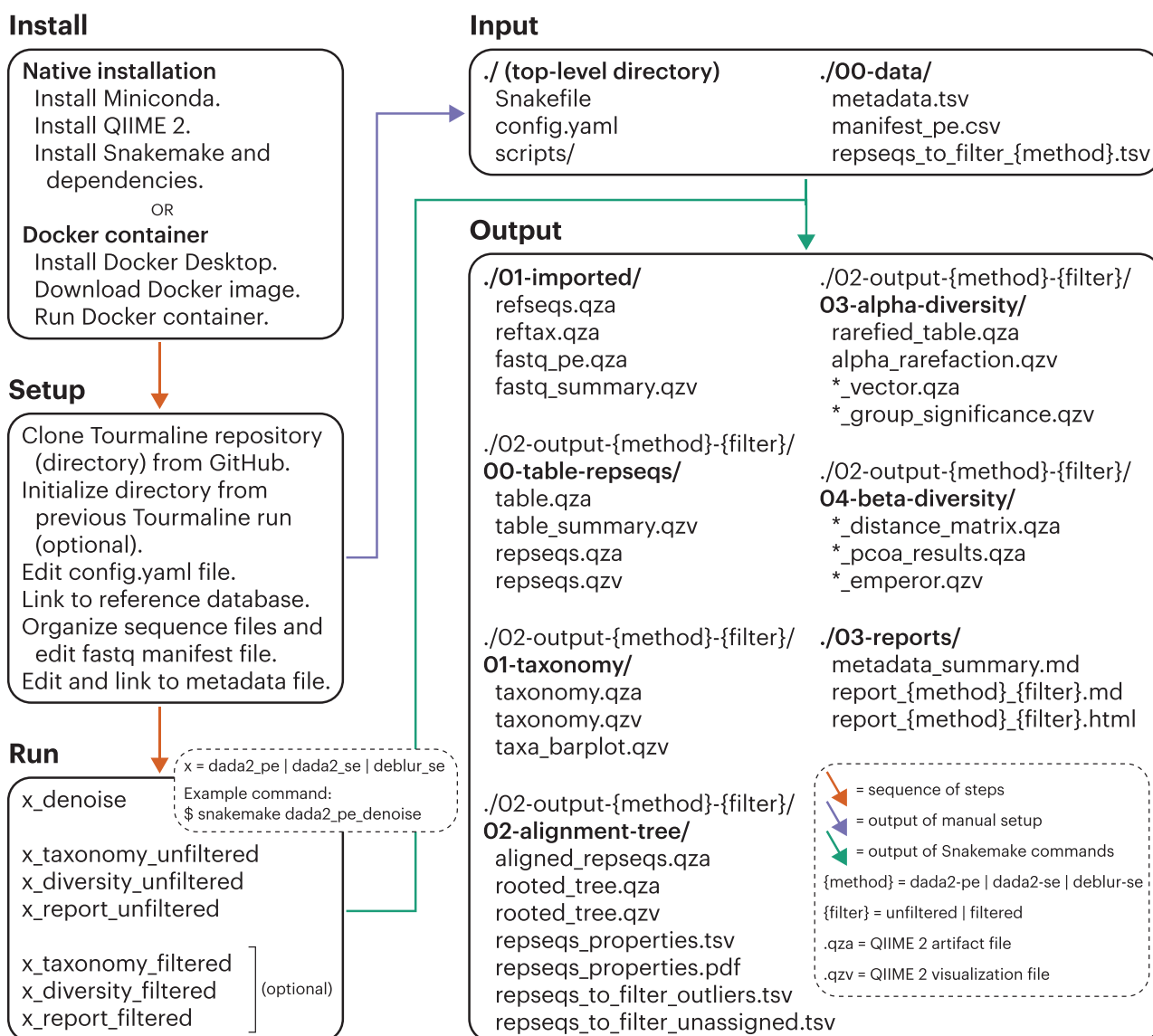


Figure 1: The Tourmaline workflow. Install natively (macOS, Linux) or using a Docker container. Set up by cloning the Tourmaline repository (directory) from GitHub, initializing the directory from a previous run (optional), editing the configuration file (*config.yaml*, Supplementary Table S1), creating symbolic links to the reference database files, organizing the sequence files and/or editing the FASTQ manifest file, and editing and creating a symbolic link to the metadata file. Run by calling the Snakemake commands for *denoise*, *taxonomy*, *diversity*, and *report*—or running just the *report* command to generate all output if the parameters do not need to be changed between individual commands. It is recommended but not required to run the *unfiltered* commands before the *filtered* commands. The primary input and output files are listed. Detailed instructions for each step are provided in the Tourmaline Wiki [44].

ment (instructions at [43]) or via a Docker container using the Docker image from DockerHub [46]. Tourmaline is installed by cloning the GitHub repository to the current directory with *git clone https://github.com/aomlomics/tourmaline*. This step is repeated any time a new iteration of Tourmaline is needed, and new copies can be initialized using a helper script (described below).

Snakefile

As a Snakemake workflow, Tourmaline has as its core files (i) a *Snakefile* that provides all the commands (rules) that comprise the workflow and (ii) a *config.yaml* file that provides the input files and parameters for the workflow. *Snakefile* contains all of the commands used by Tourmaline, which invoke QIIME 2 commands, have helper scripts (see below), or generate output directly. The

main analysis features and options supported by Tourmaline, as specified in *Snakefile*, are as follows:

- FASTQ sequence import using a manifest file, or use a preimported FASTQ.qza file
- Denoising with DADA2 [40] (paired-end and single-end) and Deblur [41] (single-end)
- Feature classification (taxonomic assignment) with options of naive Bayes [47], consensus BLAST [48], and consensus VSEARCH [49]
- Feature filtering by taxonomy, sequence length, feature ID, and abundance/prevalence
- *De novo* multiple sequence alignment with MUSCLE [50], Clustal Omega [51], or MAFFT [52] (with masking) and tree building with FastTree [53]
- Outlier detection with odseq [54]

- Interactive taxonomy barplot
- Tree visualization using Empress [55]
- Alpha diversity, alpha rarefaction, and alpha group significance with four metrics: number of observed features, Faith's phylogenetic diversity, Shannon diversity, and Pielou's evenness
- Beta diversity distances, principal coordinates, Emperor [56] plots, and beta group significance (1 metadata column) with 4 metrics: unweighted and weighted UniFrac [57], Jaccard distance, and Bray–Curtis distance
- Robust Aitchison PCA (principal component analysis) and biplot ordination using DEICODE [58]

Config file

The configuration file *config.yaml* includes paths to input files and parameters for QIIME 2 commands and other steps. Default settings have been chosen to balance run performance and accuracy and to work with the test data. For user data, all parameters should be checked and possibly adjusted for appropriateness with the data set; see Supplementary Table S1, Fig. 1, and the Wiki section *Setup* for guidance.

Input files

Tourmaline requires 3 categories of input files: (i) Reference database: a FASTA file of reference sequences (*refseqs.fna*) and a tab-delimited file of taxonomy (*refseqs.tax*) for those sequences, or their imported QIIME 2 artifact equivalents (*refseqs.qza*, *refseqs.qza*); (ii) Amplicon data: demultiplexed FASTQ sequence files and FASTQ manifest file(s) (*manifest_pe.csv*, *manifest_se.csv*) mapping sample names to the location of the sequence files, or their imported QIIME 2 equivalents (*fastq_pe.qza*, *fastq_se.qza*); and (iii) Metadata: a tab-delimited sample metadata file (*metadata.tsv*) with sample names in the first column matching those in the FASTQ manifest file. We recommend formatting metadata following the MIMARKS standard [59], and we have done so in the metadata file included with the test data set using the MIMARKS “water” environmental package. See the Wiki section *Setup* for guidance on input file paths and use of symbolic links to avoid storing multiple copies of large input files.

Run the workflow

The workflow is run using Snakemake commands. For example, if using DADA2 paired-end method without any filtering (see below), the commands would be (i) *snakemake dada2_pe_denoise*, (ii) *snakemake dada2_pe_taxonomy_unfiltered*, (iii) *snakemake dada2_pe_diversity_unfiltered*, and (iv) *snakemake dada2_pe_report_unfiltered*. Alternatively, the entire workflow can be run at once with the last command, *snakemake dada2_pe_report_unfiltered*.

Outputs

The outputs of each step of Tourmaline are described following a test run with the Lake Erie test data that come with the GitHub repository. For each command, the main parameters used and list of output files generated in those commands are provided (Fig. 2). Accompanying the list of output files is guidance for evaluating them to choose parameters for subsequent steps (Fig. 2), with screenshots of the Tourmaline-specific output files (Fig. 3) and both QIIME 2 and Tourmaline-specific output files (Supplementary Fig. S3). A video version of the tutorial is also available on YouTube [60].

Denoise

The first command is *snakemake dada2_pe_denoise* (Fig. 2), which imports the FASTQ files and reference database (if not already present in directory *01-imported*), summarizes the FASTQ data, runs denoising using DADA2, and summarizes the output. In addition to QIIME 2 visualizations of the feature table, representative sequences, and phylogenetic tree, Tourmaline generates a table and scatterplot (*repseqs_properties.tsv*, *repseqs_properties_describe.md*, and *repseqs_properties.pdf*; Fig. 3A–D) of representative sequence properties, including sequence length, number of gaps in the multiple sequence alignment, outlier status, taxonomy, and total number of observations in the observation table. Quality control can be performed using *fastq_summary.qzv* (Supplementary Fig. S3A) for quality scores and *reqseqs.qzv* (Supplementary Fig. S3C) or *repseqs_lengths.tsv* for representative sequence lengths. The helper script *fastqc_per_base_sequence_quality_dropoff.py* can be run on the output of FastQC and MultiQC to estimate and set DADA2 or Deblur truncation lengths (see below) and then rerun the *denoise* step. Based on the representative sequence lengths, filtering by sequence length can also be set, to be used later in the *filtered* commands. Choice of appropriate sampling (rarefaction) depths for the parameters “alpha_max_depth” and “core_sampling_depth,” to be used in the *diversity* step, can be done by examining *table_summary_features.txt* (Fig. 3E), *table_summary_samples.txt* (Fig. 3F), and *table_summary.qzv* (Supplementary Fig. S3B).

Taxonomy

The second command is *snakemake dada2_pe_taxonomy_unfiltered* (Fig. 2), which assigns taxonomy to the representative sequences using a naive Bayes classifier or consensus BLAST or VSEARCH method and generates an interactive taxonomy table and an interactive barplot of sample taxonomic composition. Choice of taxonomic groups to be filtered by keyword, to be used later with *filtered* commands, can be done by examining *taxonomy.qzv* (Supplementary Fig. S3D) and *taxa_barplot.qzv* (Supplementary Fig. S3E).

Diversity

The third command is *snakemake dada2_pe_diversity_unfiltered* (Fig. 2), which aligns representative sequences using 1 of 3 methods, computes outliers using *odseq* [54], and builds a phylogenetic tree. This step generates lists of representative sequences that have unassigned taxonomy and were computed to be outliers, summarizes and plots the representative sequence properties, performs alpha rarefaction, and runs alpha diversity and beta diversity analyses and group significance tests using a suite of metrics. Filtering parameters can be checked by examining *rooted_tree.qzv* (Supplementary Fig. S3F) and *repseqs_properties.pdf* (Supplementary Fig. S3G), if desired. Whether sampling depth was sufficient can be evaluated with *alpha_rarefaction.qzv* (Supplementary Fig. S3I). Alpha and beta diversity patterns and statistically significant differences between groups can be evaluated with *observed_features_group_significance.qzv* (Supplementary Fig. S3J); other alpha diversity metrics are also provided), *unweighted_unifrac_emperor.qzv* (Supplementary Fig. S3H; other beta diversity metrics are also provided), and *beta_group_significance.qzv* (Supplementary Fig. S3K).

Report

The fourth and final command is *snakemake dada2_pe_report_unfiltered* (Fig. 2), which creates a comprehensive HTML report of parameters, metadata, inputs, outputs, and visu-

Parameters in config.yaml

Output to evaluate

snakemake dada2_pe_denoise

```
# use manifest file to import fastq.gz sequence files
manifest_pe: 00-data/manifest_pe.csv

# use pre-imported reference database
refseqs_qza: 01-imported/refseqs.qza
reftax_qza: 01-imported/reftax.qza

# choose dada2 parameters based on fastq error profiles
dada2pe_trunc_len_f: 240
dada2pe_trunc_len_r: 190
```

fastq_summary.qzv

- median Q-score <30 occurs at fwd. position 267 and rev. position 233 -> trimming at 240 and 190 is acceptable for this amplicon (<300 bp)
- 16 samples (fwd. & rev.) all have 1000 reads per sample (test dataset)

repseqs.qzv & repseqs_lengths.tsv

- of 301 repseqs, most are 253 bp and max is 255 bp except two that are much longer (416 bp, 417 bp) -> filter by length max 260 bp

table_summary.qzv

- of 16 samples, lowest count per sample is 511 -> set core sampling depth (rarefaction) to 500 (check again after filtering)

snakemake dada2_pe_taxonomy_unfiltered

```
# choose taxonomic classification method (*)
classify_method: consensus-vsearch
```

taxonomy.qzv

- 10 repseqs are "Unassigned" and 2 repseqs are "d_Eukaryota" -> filter by keywords "unassigned,eukaryota"

taxa_barplot.qzv

- the contribution of Unassigned and Eukaryota groups is <10%; still want to filter them

snakemake dada2_pe_diversity_unfiltered

```
# choose MSA parameters (*)
alignment_method: muscle
alignment_muscle_maxiters: 2
alignment_muscle_diags: -diags

# choose outlier detection parameters (*)
odseq_distance_metric: linear
odseq_bootstrap_replicates: 100
odseq_threshold: 0.025

# choose sampling (rarefaction) depth
core_sampling_depth: 500
alpha_max_depth: 500

# choose beta group significance parameters (*)
beta_group_column: region
beta_group_method: permanova
beta_group_pairwise: --p-pairwise
```

rooted_tree.qzv

- feature metadata coloring confirms we should filter Unassigned and Eukaryota

repseqs_properties.pdf

- confirms we should filter Unassigned and Eukaryota and sequences longer than 260 bp; don't need to filter all outliers

alpha_rarefaction.qzv

- observed features plateaus at ~450–500 sequences per sample

observed_features_group_significance.qzv

- difference between regions (Open Water vs. Western Boundary) is not significant by Kruskal–Wallis, but filter size is significant

unweighted_unifrac_emperor.qzv

- separation by region (axis 2) and filter size (axes 1 & 2)

beta_group_significance.qzv

- distance based on region is significant

snakemake dada2_pe_report_unfiltered

```
# choose theme for html report
report_theme: github
```

report_dada2-pe_unfiltered.html

- a summary of the results and metadata and links to output files are presented in this HTML report

snakemake dada2_pe_report_filtered

```
# choose terms to filter from taxonomy (**)
exclude_terms: unassigned,eukaryota

# choose repseq length limits
repseq_min_length: 0
repseq_max_length: 260
```

table_summary.qzv

- of 16 samples, lowest count per sample is 507 -> it was ok to leave sampling (rarefaction) depth at 500

rooted_tree.qzv

- feature metadata coloring confirms Unassigned and Eukaryota were removed, and tree topology is more homogeneous

repseqs_properties.pdf

- confirms long sequences and Unassigned and Eukaryota were removed, resulting in fewer gaps in the multiple sequence alignment

report_dada2-pe_filtered.html

- a summary of the results and metadata and links to output files are presented in this HTML report

(*) these steps can be defined before starting the workflow, as they do not depend on the output of previous steps

(**) all steps are being run at once by using the report command

Figure 2: Step-by-step tutorial on Tourmaline using the provided test data, which are subsampled from the 16S rRNA amplicon data of a 2018 survey of Western Lake Erie. Key parameters in *config.yaml* and primary output for each command (pseudo-rule) are listed. Indicated output should be evaluated to determine the appropriate parameters for the next command. Evaluation of the primary outputs and rationale for parameter choice is shown for the test Lake Erie 16S rRNA data that come with the Tourmaline repository. See Supplementary Fig. S3 for screenshots of the primary output files.

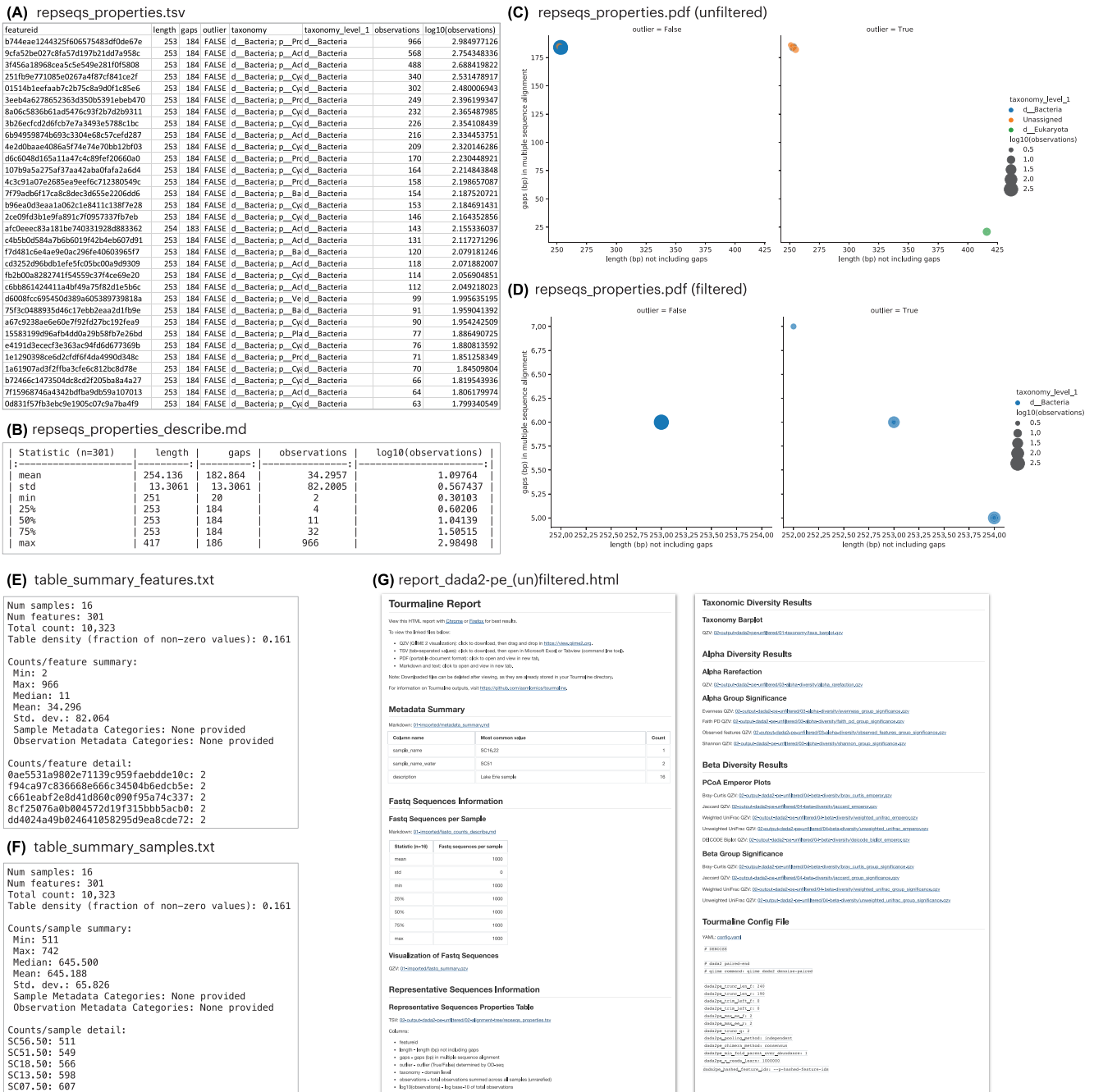


Figure 3: Example of the main outputs of the Tourmaline workflow beyond the QIIME 2 outputs. Contents in panels A, E, F, and G are truncated. Screenshots of additional output files are provided in Supplementary Fig. S3. See Fig. 2 for commands, parameters, and guidance.

alizations in a single file. The file *report_dada2-pe_unfiltered.html* (Fig. 3G) can be viewed in a web browser, and the linked output files can be viewed in a browser or downloaded and opened with [61] (.qzv files) or Microsoft Excel (.tsv files). Whether metadata are compliant with metadata standards such as MIMARKS can be easily detected by viewing the metadata summary in the report, which lists each metadata column and its most common value.

Filtering

After reviewing the *unfiltered* results—the taxonomy summary and taxa barplot, the representative sequence summary plot and table, and the list of unassigned and potential outlier representative sequences—the user may wish to filter (remove) certain repre-

sentative sequences by taxonomic group or other properties. This is done by setting the filtering parameters in *config.yaml* and providing a list of any individual representative sequences to filter, then running the *filtered* commands of the workflow: *snakemake dada2-pe_taxonomy_filtered*, *snakemake dada2-pe_diversity_filtered*, and *snakemake dada2-pe_report_filtered* (Fig. 2). Among the *filtered* output, the user can check *table_summary.qzv* (Supplementary Fig. S3L) to ensure that the sampling depth after filtering did not exclude samples and examine *rooted_tree.qzv* (Supplementary Fig. S3N) and *repseqs_properties.pdf* (Supplementary Fig. S3O) to check that the desired representative sequences were filtered. All of the outputs can be viewed by opening *report_dada2-pe_filtered.html* (Supplementary Fig. S3M) in a web browser.

Downstream analysis and meta-analysis

For users who wish to analyze their output further using Jupyter notebooks, we provide Python and R notebooks preloaded with popular data analysis and visualization tools for those platforms. These notebooks come ready to run with Tourmaline output, using relative paths to take advantage of Tourmaline's defined output file structure. The notebooks are shown with the tutorial data set that comes with Tourmaline. We also provide a Python notebook for meta-analysis, containing commands to merge outputs from multiple Tourmaline runs and then perform diversity analyses on the merged files.

Python Jupyter notebook

The Python Jupyter notebook (Supplementary Fig. S2A) uses the QIIME 2 Visualization and Artifact object classes, loading Visualization and Artifact objects from the .qzv and .qza Tourmaline output files. Before running the notebook, the denoising method, filtering mode, and alpha and beta diversity metrics to be used can be specified by changing variable assignments at the beginning of the notebook. The notebook renders Visualization objects for the feature table summary, representative sequences summary, phylogenetic tree, taxonomy, taxa barplot, alpha diversity group significance, and beta diversity principal coordinates analysis (PCoA) Emperor plot. Artifact objects can be viewed as a Pandas [62] DataFrame or Series. The notebook generates Pandas DataFrames for the feature table, taxonomy, reference sequence properties, and metadata, as well as a Pandas Series for alpha diversity. Static plots are generated from some of these tables using Seaborn [63].

R Jupyter notebook

The R Jupyter notebook (Supplementary Fig. S2B) imports Tourmaline artifact (.qza) files using qiime2R [64] and uses common R packages for analyzing and visualizing amplicon sequencing data, including phyloseq [65], tidyverse [66], and vegan [67]. The notebook covers how to import QIIME 2 count and taxonomy artifact files from Tourmaline into an R environment, merge and manipulate the resulting data frames into a single phyloseq object, and estimate and plot diversity metrics and taxonomy barplots of the 16S community using phyloseq and other packages. As with the Python notebook, a set of variables can be specified at the beginning of the R notebook to define specific denoising, filtering, and diversity metrics. After reading in the metadata file and merging to a phyloseq object, we define plotting parameters that can be easily modified by the user to customize the R visualizations.

Meta-analysis notebook

The meta-analysis notebook (Supplementary Fig. S3C) guides the user through running Tourmaline on 2 separate data sets, merging the outputs (feature tables, representative sequences, and taxonomies) and metadata, and performing some basic diversity analyses on the merged output. For simplicity, the 2 data sets are derived from the test data that come with Tourmaline. The commands provided could be applied to any set of Tourmaline outputs that the user wishes to combine in a meta-analysis. The only requirement is that the sequenced region must be the same across the data sets for the results to make sense. This notebook is a simple example that demonstrates Tourmaline's capacity to facilitate merging of outputs and meta-analysis. Many additional analyses are possible on the merged output, such as demonstrated in published microbiome meta-analyses [2, 68].

Helper scripts and parameter optimization

Tourmaline comes with several helper scripts that are run automatically with the workflow or run directly by the user. See the Wiki section *Setup* for more information.

Initialize a new Tourmaline directory

From the main directory of a newly cloned Tourmaline directory, the script `initialize_dir_from_existing_tourmaline_dir.sh` will copy `config.yaml` and `Snakefile` from an existing tourmaline directory, remove the test files, and then copy the data files and symlinks from the existing Tourmaline directory. This is useful when performing a new analysis on the same data set. The user can clone a new copy of Tourmaline, run this script to copy everything from the old copy to the new one, and then make desired changes to the parameters.

Create a FASTQ manifest file

Two scripts help create the manifest file that points Tourmaline to the FASTQ sequence files. (i) `create_manifest_from_fastq_directory.py` creates a FASTQ manifest file from a directory of FASTQ files. (ii) `match_manifest_to_metadata.py` takes an existing FASTQ manifest file and generates 2 new manifest files (paired-end and single-end) corresponding to the samples in the provided metadata file.

Determine optimal truncation length

If FastQC and MultiQC have been run for Read 1 and Read 2, `fastqc_per_base_sequence_quality_dropoff.py` will determine the position where median per-base sequence quality drops below some fraction (default: 0.90) of its maximum value. This is useful for defining 3' truncation positions in DADA2 and Deblur ("dada2pe_trunc_len_f", "dada2se_trunc_len", and "deblur_trim_length").

Parameter optimization

The helper scripts and Tourmaline's defined directory structure enable testing and comparison of different parameter sets to optimize a workflow. By making multiple copies of the directory and populating settings with `initialize_dir_from_existing_tourmaline_dir.sh` script, varying one or a small number of parameters, and running the workflow multiple times in parallel, outputs can be compared visually or programmatically to see the effects of parameter choices and choose a final set. To illustrate this, we analyzed the full data set of the 2018 Lake Erie 16S rRNA study (BioProject PRJNA679730 [69]). Running `fastqc_per_base_sequence_quality_dropoff.py` had suggested that a forward truncation length of 240 bp and reverse truncation length of 190 bp would strike a balance between sequence length and quality, but we wanted to test a full range of truncation lengths. We tested the effects of varying the forward and reverse truncation lengths from 100 bp to 250 bp in 50-bp increments on the distribution of representative sequence length (Supplementary Fig. S4A) and the number of reads assigned to Eukaryota (Supplementary Fig. S4B), a group potentially amplified by these primers but with longer representative sequences. This analysis helped choose a set of truncation lengths that would capture a large diversity of target organisms.

Parallelization and benchmarks

Thanks to efforts of developers of QIIME 2 and other software, Tourmaline supports multiple cores in steps that support them, including denoising, feature classification, multiple sequence alignment, tree building, and core diversity calculations. To eval-

uate runtimes with a real-world data set, we ran Tourmaline on the full data set of the 2018 Lake Erie 16S rRNA study [69], which is the data set from which the test data set was subsampled. This data set was sequenced with 2×300 -bp Illumina MiSeq sequencing and consists of 96 samples having an average of 120,338 paired reads per sample, for a total of 11,552,448 paired reads. Processing was performed using the Tourmaline Docker container running on a 2017 iMac Pro with an 18-core 2.3-GHz Intel Xeon W processor and 64 GB RAM (32 GB RAM allocated for the Docker container). Speed improvements with parallelization were tested by running Snakemake with either 1 or 8 cores (parameter: `--cores`). Each main step in the workflow (*denoise*, *taxonomy*, *diversity*, and *report*; *unfiltered* commands) was run and timed separately. Times would be expected to be similar for *filtered* commands except that the *denoise* rule does not need to be rerun. The results (Table 1) show that a relatively large data set of ~100 samples with ~100,000 sequences per sample can be processed with a single core in ~5 hours. Dramatic speed improvements are possible with multiple cores, with this same data set being processed in ~2 hours when 8 cores were used.

Biological insights

The purpose of performing amplicon sequencing or metabarcoding is to reveal patterns of diversity, community structure, and biological (or environmental) drivers within diverse ecosystems. Whether the system of study is microbial communities in an environmental or biomedical setting or trace environmental DNA in an aquatic or terrestrial system, the kinds of biological questions being asked are similar. Tourmaline supports biological insight in 2 important ways: (i) by supporting the most popular analysis tools and packages in use today, with capacity to expand as new tools are developed, and (ii) by providing multiple ways to view the output, giving everyone from experts to novices a platform to visualize and query the output.

Through its core QIIME 2 functionality and downstream support for R and Python data science packages, Tourmaline enables analysis of the core metrics of microbial and eDNA diversity: taxonomic composition, within-sample diversity (alpha diversity), and between-sample diversity (beta diversity). Examining our analysis of the tutorial data set (Supplementary Fig. S3), we can see how Tourmaline facilitates insight into Western Lake Erie microbial communities. The interactive barplot (Supplementary Fig. S3E) provides rapid insights: the most abundant bacterial families in the $5.0\text{-}\mu\text{m}$ fraction are Sporichthyaceae and SAR11 Clade III; the most abundant bacterial family in the $0.22\text{-}\mu\text{m}$ fraction is Cyanobiaceae (the toxic cyanobacterial family Microcystaceae is less abundant), with the largest component assigned as chloroplasts, which can be filtered in a subsequent run; at the domain level, a small fraction of unassigned and Eukaryota-assigned sequences are observed, which can also be filtered. The alpha diversity results show that the $5.0\text{-}\mu\text{m}$ fraction has greater within-sample diversity (number of observed features) than the $0.22\text{-}\mu\text{m}$ fraction (Supplementary Fig. S3J) and that this diversity appears to be saturated, with a relatively small sampling depth of ~350 sequences per sample sufficient to observe these values (Supplementary Fig. S3I). However, because a large fraction of the $0.22\text{-}\mu\text{m}$ sequences was identified as chloroplast, filtering out those sequences in a future run would be warranted and provide more accurate diversity results. The beta diversity results show that 16S communities are distinguished both by location (Open Water vs. Western Boundary) and size fraction ($0.22\text{-}\mu\text{m}$ vs. $5.0\text{-}\mu\text{m}$) (Supplementary Fig. S3H). From this simple tutorial data set, we

demonstrate the use of Tourmaline to analyze environmental amplicon data, in this case revealing the importance of pore size when filtering water samples for microbial sequencing and the presence of spatial variability (regardless of pore size) among microbial communities in Lake Erie.

The ability to view Tourmaline output files with multiple interfaces provides access to researchers with different backgrounds. For users experienced with the Unix command line, the diverse output file types, organized in a defined directory structure, can be queried and analyzed using a wide array of data science tools; anything that can be done with QIIME 2 output and other common sequence diversity output files types can be done with Tourmaline output. For data scientists most comfortable with Jupyter notebooks, the prebuilt Python and R notebooks come ready to work with Tourmaline output and rapidly enable biological discovery from amplicon data. For casual users, the web-based report and QIIME 2 visualizations provide a user-friendly on-ramp to view and interact with the data. This last mode of interacting with the output opens up amplicon analysis to a wider range of users than is typically possible, from collaborators to students to anyone with limited data science expertise. This increased accessibility can accelerate the pace of discovery by increasing the diversity of researchers able to work with the data.

Conclusions

Tourmaline provides a comprehensive platform for amplicon sequence analysis that enables rapid and iterable processing and inference of microbiome and eDNA metabarcoding data. It has multiple features that enhance usability and interoperability:

- **Portability.** Native support for Linux and macOS in addition to Docker containers, enabling it to run on desktop, cluster, and cloud computing platforms.
- **QIIME 2.** The core commands of Tourmaline, including the DADA2 and Deblur packages, are all commands of QIIME 2, one of the most popular amplicon sequence analysis software tools available. Users can print all of the QIIME 2 and other shell commands of a workflow before or while running the workflow.
- **Snakemake.** Managing the workflow with Snakemake provides several benefits:
 - **Configuration file** contains all parameters in one file, so the user can see what the workflow is doing and make changes for a subsequent run.
 - **Directory structure** is the same for every Tourmaline run, so the user always knows where outputs are.
 - **On-demand commands** mean that only the commands required for output files not yet generated are run, saving time and computation when rerunning part of a workflow.
- **Parameter optimization.** The configuration file and defined directory structure make it simple to test and compare different parameter sets to optimize a workflow.
- **Visualizations and reports—ready to share.** Every Tourmaline run produces an HTML report containing a summary of metadata and outputs, with links to web-viewable QIIME 2 visualization files. Zipped run directories can be shared with collaborators, with relative links in the report allowing easy access to the visualizations and other output files.
- **Downstream analysis.** Analyze the output of single or multiple Tourmaline runs programmatically, with qiime2R in R or

Table 1. Benchmarking and parallel processing results from running the full 2018 Lake Erie 16S rRNA data set through Tourmaline with either 1 or 8 cores using a Tourmaline Docker container allocated with 32 GB RAM running on an 18-core iMac Pro (2017). The Snakemake command used the parameter `--cores 1` or `--cores 8`, and parameters in `config.yaml` specifying the number of threads for individual rules were set to 1 or 8, respectively. Times reported are the elapsed real time between invocation and termination and are reported as HH:MM:SS. Times do not include the initial step of importing FASTQ files into a QIIME 2 archive (`fastq_pe.qza`), which took ~2 minutes. Parameters shown in the last column are those most relevant to the runtimes. Unless otherwise noted, the parameters used were the defaults in `config.yaml`.

Rule	Time (--cores 1)	Time (--cores 8)	Parameters and details
dada2_pe_denoise	02:05:43	00:38:10	method: dada2-pe 96 samples * 120,338 sequences per sample = 11,552,448 total sequences
dada2_pe_taxonomy_unfiltered	01:31:55	00:12:39	classify_method: consensus-vsearch 12,379 representative sequences
dada2_pe_diversity_unfiltered	01:18:09	01:13:49	alignment_method: muscle alignment_muscle_maxiters: 2 alignment_muscle_diags: -diags odseq_distance_metric: linear odseq_bootstrap_replicates: 100 odseq_threshold: 0.025 12,379 representative sequences (lengths: min 240, max 418, avg 258)
dada2_pe_report_unfiltered	00:00:05	00:00:05	–
Total	04:55:52	02:04:43	–

the QIIME 2 Artifact API in Python, using the provided R and Python Jupyter notebooks or other code.

- **Meta-analysis.** The standardized input and output file names and directory structure facilitate meta-analysis of multiple studies that have been analyzed through Tourmaline. The provided meta-analysis Jupyter notebook, written in Python, uses Pandas and the QIIME 2 Artifact API and provides a starting point for combining and coanalyzing the output of multiple Tourmaline runs.

Through its streamlined workflow and broad functionality, Tourmaline enables rapid response and biological discovery in any system where amplicon sequencing is applied, from biomedical and environmental microbiology to eDNA for fisheries and protected or invasive species. The QIIME 2–based interactive visualizations it generates allow users to quickly compare differences between samples and groups of samples in their taxonomic composition, within-sample diversity (alpha diversity), and between-sample diversity (beta diversity), which are core metrics of microbial and eDNA diversity. Tourmaline’s unique HTML report and preloaded Jupyter notebooks provide ready access to the output, supporting less-experienced researchers and data scientists alike, and the output files are ready to be loaded into a variety of downstream tools in the QIIME 2 and phyloseq ecosystems. Future improvements to the workflow will include support for new QIIME 2 releases and plugins, better integration with Snakemake, possibly including Conda integration and connecting Snakemake’s reporting ability with QIIME 2’s provenance tracking, and enhanced support for cloud computing environments. With its existing features that balance usability, functionality, iterability, and scalability, and with continued development with support from the research community, Tourmaline will be a valuable and longstanding tool for amplicon sequence analysis.

Methods

Sample collection and DNA extraction

Water samples were collected using a long-range autonomous underwater vehicle (LRAUV, Monterey Bay Aquarium Research Institute) equipped with a third-generation environmental sample processor (3G-ESP, Monterey Bay Aquarium Research Institute) [70]. For each sample, water was filtered through stacked 5.0- μm (top) and 0.22- μm (bottom) Durapore filters (EMD Millipore, Burlington, MA, USA) held in custom 3G-ESP “archive” cartridges and preserved in-cartridge with RNAlater (Thermo Fisher Scientific, Waltham, MA, USA). DNA extraction was performed using the Qiagen (Qiagen, Hilden, Germany) DNeasy Blood and Tissue kit.

Amplicon sequencing

Extracted DNA was amplified using a BioScientific NEXTFlex 16S V4 Amplicon-Seq Kit 2.0 (NOVA-520999/Custom NOVA-4203-04) (BioScientific, Austin, TX, USA). Target-specific regions of the forward and reverse primers in the 16S V4 Amplicon-Seq kit were custom ordered to follow the Earth Microbiome Project 16S Illumina Amplicon Protocol: forward primer 515F 5'-GTGYCAGCMGCCGCGGTAA-3' [71] and reverse primer 806R 5'-GGACTACNVGGGTWTCTAAT-3' [72]. 16S rRNA amplicons were pooled and sequenced on an Illumina MiSeq with 2 × 300-bp chemistry at the University of Michigan Advanced Genomics Core [73]. Demultiplexed sequences were deposited in NCBI under BioProject PRJNA679730 [69].

Availability of Supporting Source Code

- Project name: Tourmaline
- Project home page: <https://github.com/aomlomics/tourmaline>

- Operating systems: macOS (native or Docker), Linux (native or Docker), Windows (Docker)
- Programming language: Python
- Other requirements: Conda or Docker
- License: 3-clause BSD license
- RRID: SCR_022465
- bio.tools ID: tourmaline

Availability of Supporting Data

- The test 16S data set (1,000 sequences per sample) is available directly from the GitHub repository at [43].
- Reference databases are available for 16S rRNA at [74] and for 18S-ITS rRNA at [75].
- Output for the tutorial using the included test data is available from Zenodo at [76].
- A snapshot of the GitHub repository is available from Zenodo at [77].

Additional Files

Supplementary Fig. S1. Directed acyclic graphs (DAGs) of the Tourmaline workflow for the DADA2 paired-end method from start to report with (a) *unfiltered* commands and (b) *filtered* commands. This figure was generated from the test data that comes with the repository by running the commands (a) `snakemake dada2_pe_report_unfiltered --dag | dot -Tpdf -Grankdir=LR -Gnodesep=0.1 -Granksep=0.1 > dag_pe_report_unfiltered.pdf` and (b) `snakemake dada2_pe_report_filtered --dag | dot -Tpdf -Grankdir=LR -Gnodesep=0.1 -Granksep=0.1 > dag_pe_report_filtered.pdf`. For a simpler graph, substitute `--rulegraph` for `--dag` in the above commands.

Supplementary Fig. S2. Screenshots of Tourmaline's included Python and R Jupyter notebooks running the provided test data. Both notebooks are designed to run out-of-the-box with the Tourmaline output from any data set. (A) The Tourmaline Python notebook loads and displays sample metadata, feature metadata (representative sequences properties and taxonomy), static plots generated by Seaborn, and interactive QIIME 2 visualizations. (B) The Tourmaline R notebook demonstrates how to load .qza files (counts and taxonomy) into R, merge files with metadata into a single phyloseq object, and generate high-quality visualizations of community diversity and taxonomy using phyloseq and a suite of tidyverse packages (e.g., ggplot2). (C) The Tourmaline meta-analysis notebook walks through the merging of 2 sets of Tourmaline outputs and performing some basic diversity analyses on the merged files. The number of processed data sets being merged in the meta-analysis can be increased by adding additional inputs to the commands.

Supplementary Fig. S3. Screenshots of the primary output files after running Tourmaline on the test data (see Fig. 2 for commands, parameters, and guidance). The visualization files (.qzv, .pdf, .html) are useful both for data evaluation and discovery and for biological insight.

Supplementary Fig. S4. Effect of truncation length parameters on (A) the distribution of representative sequence length and (B) the number of reads assigned to Eukaryota in the full 2018 Lake Erie 16S rRNA amplicon data.

Supplementary Table S1. Parameters in the configuration file, `config.yaml`, that the user may edit as necessary. Additional parameters not shown may also be edited. The default configuration file is provided in the top level of the GitHub repository. The file format of `config.yaml`, YAML (yet another markup language), is a simple

markup language that is used by Snakemake to specify parameters for a workflow.

Abbreviations

ASV: amplicon sequence variant; bp: base pair; COI: cytochrome oxidase I; DAG: directed acyclic graph; eDNA: environmental DNA; ITS: internal transcribed spacer; NMDS: nonmetric dimensional scaling; PCoA: principal coordinates analysis; PCR: polymerase chain reaction; QIIME: Quantitative Insights Into Microbial Ecology.

Competing Interests

The authors declare that they have no competing interests.

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Authors' Contributions

The Tourmaline workflow was designed and developed by L.R.T. Code was tested by L.R.T., N.V.P., S.R.A., and S.J.L. The Docker image was built by N.V.P. and L.R.T. Data analysis and visualization of the case study were done by S.R.A. Analysis notebooks were developed by L.R.T., S.R.A., and G.S. Samples were collected by P.A.D.U. and K.D.G. DNA was extracted and prepared for sequencing by P.A.D.U. The manuscript was written by L.R.T., S.R.A., P.A.D.U., S.J.L., and K.D.G.

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