

# Subregional Workshop for Arabic-speaking Countries on the Clearing-House Mechanism (CHM)

CHM

5-9 March 2018, Cairo, Egypt

# Training Session on the Bioland Tool for National Clearing-House Mechanisms

Alexandre Rafalovitch, Clearing-House Mechanism, CBD Secretariat



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## **Background**

#### CHM Network

- Decision XII/2 B reiterated the importance of national CHMs
- Only 50% of Parties have a national CHM
- Many countries use the European Portal Tool Kit (PTK)

#### Experiences from workshops

- Guidance is not sufficient
- Barriers to the establishment of a national CHM
- Lack of capacity to establish and maintain the CHM

### CHM expert meeting at EEA (December 2014)

- European Portal Tool Kit (PTK) based on obsolete platform (Zope)
- Should be based on popular open-source content management system
- Consideration of various options
- Proposal by Belgium to offer web-hosting if Drupal CMS

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## Two-phase approach

#### Phase 1 - New tool

- Targeted at Parties without a national CHM
- Ideally turn-key solution to overcome known barriers
- Development of new Drupal-based tool
- Offered to interested Parties

#### Phase 2 - Migration of European Portal Tool Kit

- Targeted at Parties using the PTK
- Integration with Bioland tool
- Gradual migration of interested Parties

#### Maintenance and evolution

- Managed by CBD Secretariat
- Hosted by Belgium

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#### Technical Features

- Backed by full Content Management System (Drupal)
- Hosted turn-key solution for Parties
- Multilingual capabilities (including translation workflow)
- Modular & extensible
- Interoperability

#### Content features

- Basic generic national CHM
- Responsive web pages
- Content Management System
  - Pages & menus
  - Custom content types (common formats)
  - Metadata (controlled vocabularies)
  - ...

#### Actively developed

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## Features - Starter menu

- Home
  - → Attract users & promote key content
- About us
  - → About this site, the CHM and the CBD
- → Biodiversity
  - → Overview of national biodiversity
- Implementation
  - → Projects
- Information
  - → Information centre to access all content types
- Participate
  - → To encourage participation (e.g. forums)

## Features - Content Types

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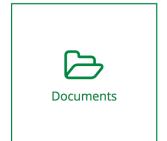
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## Features - Bioland roles

#### Content Manager

- Day to day activity
- Entering information
- Managing menus
- Ease of use

#### Site Manager

- Managing other users
- Configuring complex page layouts (with help)
- Initial website setup
- May need some hand-holding/manual rereading

#### System Administrator

- Full access to underlying Drupal instance
- Controlled by secretariat

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## Demo - Exploring Bioland tool

- Bioland central node (CHM Network)
  - http://www.chm-cbd.net
- Bioland National Node demo
  - http://demo.chm-cbd.net/
- Your own exploration space
  - https://test-CC.chm-cbd.net/ (CC=your country's ISO code)
  - Each is a separate website on the common platform

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# **DEMO**

Content Manager http://test-demo.chm-cbd.net

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## **Advanced Features**

#### When to use site manager account

- To do higher-authority work
  - Manage users
- When the site is being setup/migrated
  - Initial parameters
  - Regional/timezone preferences
  - Protect/unprotect during development
  - Email addresses for system emails
- When the site is doing significant maintenance
  - Maintenance mode
  - Custom redirects (e.g. from old website structure)
- To do complex pages and configuration
  - Landing pages
  - Custom CSS
  - Statistics block configuration
- Some actions have link to documentation near the top
  - https://www.chm-cbd.net/support/bioland-tool/manual

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## Site Manager – mini demos

#### Create users

- Create new user account
- Give them permission
  - Content Manager
  - Site Manager
- Remember to notify them (checkbox)

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## Site Manager – mini demos

#### Initial setup

- Configuration/Basic site settings
  - Site name
  - Slogan
  - Email address (system)
- Configuration/shield
  - Password protect the whole site (during development)

#### Infrequent changes

- Configuration/Basic site settings
  - Default home page
- Configuration/Maintenance mode
  - Disable site serving for deep changes behind the scenes
- Logos/colors/theming
  - Semi-hidden link
  - Access from Manage Bioland speed action menu

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## Site Manager – mini demos

### Complex layouts

- Content type: Landing page
- Check existing content (many landing pages)
- Careful with "Revert to Default" resets the layout

#### Creating complex layout

- Create Landing page (just the title)
- View the page and use the bottom bar

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# Site Manager – mini demos

#### Feedback form

- Confirm site email
- Design the form
- Add email triggers
- Add it to the menu
- Test



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