

FINAL ACTIVITY REPORT

Francophone mentoring and translation of the open-source ALA platform



Guidelines on how to complete the activity report are included in italics. Please include sources of verification as links or annexes.

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1. Executive summary

Provide a brief explanation of the project and its implementation, the main capacity enhancement objectives achieved, lessons learned and conclusions.

The main goal of the technical mentoring activity between GBIF France and Canadensys funded by the GBIF CESP program was to share information between the two nodes in order to facilitate the installation of an Atlas of Living Australia platform at Canadensys. We also aimed to rapidly go beyond this initial installation and to deploy, in a Canadensys structure and context, a complete basic customized ALA platform installation and prepare its migration to the Compute Canada cloud.

During the technical mentoring that took place in Montréal in July 2017, we prepared ALA frontend user and administration interfaces in two languages (French and English) with improvement of admin panel templates, we fully integrated the Canadensys style guide using responsive design, and transferred datasets. The proposed mentoring included context discovering, a few days of coding, and finished with the launch of the demonstration website. An important outcome of the proposed mentoring session was that the Canadensys team has now become a mentor and is capable of transferring knowledge and provide training on basic ALA modules.

The new ALA-based Explorer was launched for TWDG 2017 and is visible at <http://explorer.canadensys.net>. It contains the basic ALA modules (biocache, collectory, images) and the associated web services. Canadensys is currently migrating the basic ALA modules to the Cloud and will continue improving its development based on ALA, as well as provide training session for its users.

In parallel, as part of this collaboration and during the international ALA workshop that took place in Spain in February 2018 we translated the documentation around ALA into French. This important contribution will increase the visibility for the community of French speaking nodes across the World. The documentation is available in a French wiki (<https://github.com/AtlasOfLivingAustralia/Documentation-en-francais>). Fabien Caviere, from

GBIF France, was in charge of the ALA documentation for the project and managed the organisation of the different wikis (English and French).

2. Contact information

Provide the name, institutional affiliation, role in the project and contact details of the author(s) of the report.

Name of the representative	GBIF Participant represented	Role(s) in project	contact information
Anne Bruneau	Canadensys	Mentee node	anne.bruneau@umontreal.ca
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Marie-Elise Lecoq	GBIF France	Mentor node	melecoq@gbif.fr
Jérémy Goimard	Canadensys	Mentee node	canadensys.network@gmail.com
Carole Sinou	Canadensys	Mentee node	canadensys.network@gmail.com

3. Project summary

This section should provide readers with a good understanding of the project, from the original plans to the final implementation, highlighting:

- *The capacity needs that instigated the project and how these have changed as a result of the project activities.*
- *The activities that have been completed at the time of writing the report, and those that are ongoing or pending (e.g. longer-term evaluation, follow-up projects/meetings/training events) and your plans for their completion.*
- *How the different partners in the project have contributed to its implementation.*

Established in 2006 at Université de Montréal (UdeM) through a major grant from the Canada Foundation for Innovation, Canadensys makes Canadian biodiversity information freely and openly available to everyone with emphasis on the digitization of specimens from biological collections. Twelve years later, Canadensys is a powerful Canadian network that groups universities, museums, ministries, etc. Canadensys has published on the web more than 4 million occurrence records that help describe the rich diversity of life in Canada. Canadensys is an active member of the Global Biodiversity Information Facility (GBIF) and has developed skills and technology in biodiversity informatics. The Canadensys Explorer reached its limit in 2017, hampering our capacity to fulfill the main objective of making biodiversity data easily accessible to all. In 2016, Canadensys took the decision to test and install basic modules of the Atlas of Living Australia (ALA) platform in order to replace its current Explorer.

The main goal of this technical mentoring activity between GBIF France and Canadensys was to rapidly go beyond this initial installation and to deploy, in a Canadensys structure and context, a complete basic customized ALA platform installation and prepare its migration to the Cloud. During the technical mentoring that took place in Montréal in July 2017, we prepared ALA frontend user and administration interfaces in two languages (French and English) with improvement of admin panel templates, fully integrated the Canadensys style guide using responsive design, and transferred datasets. The mentoring activity included

context discovering, a few days of coding, and the launch of the demonstration website. An important outcome of the mentoring session was that the Canadensys team became a mentor and can now transfer knowledge and provide training on basic ALA modules.

In parallel, this collaborative project resulted in the translation of the ALA documentation into French. Our goal was to increase the visibility for the community of French speaking nodes. In connection with the CESP 2017/2018 'International Living Atlases workshop' project, we also continued the translation of the ALA documentation during the international ALA workshop that was organised in Spain in February 2018.

3.1. Activities completed

Highlight the activities that have been completed at the time of writing the report. Explain how the different partners in the project have contributed to its implementation.

Four main activities had been planned in the initial project proposal: a mentoring-training workshop, migration of the Canadensys Explorer to an ALA based model, participation and presentation at the TDWG 2017 conference, and translation of ALA documentation in French.

As planned, and in order to respond to Objectives 1-3 of the CESP project proposal, a technical training workshop took place in Montréal in July 2017 where GBIF France joined the Canadensys team. At this workshop we adapted the ALA architecture to the Canadensys context. The first Canadensys ALA-based Explorer in production was launched in October 2017 for the TDWG conference.

The Explorer is now available (<http://explorer.canadensys.net>), as well as the images module (<http://images.canadensys.net>) and the collectory module (<http://collections.canadensys.net>). We also prepared ansible scripts to transfer ALA to a Canadensys server or on the Cloud. During the technical workshop, we discovered an important issue on institution and collection codes for GBIF France, Canadensys and GBIF Sweden. This issue (<https://github.com/AtlasOfLivingAustralia/collectory-plugin/issues/103>) was reported on Github in August 2017.

Objectives 4 and 6 were also partially attained during the workshop in Montréal. For example, during this workshop, we changed the ALA wiki documentation to reflect the evolution of the community. The ALA documentation backbone was completely rewritten and is ready to be completed by the ALA community. A collaborative document managed by Fabien Cavière (GBIF France), whose purpose is to complete and improve this part of the project, was created: it contains all parts of wikis (English and French) and their status. In addition, every month one section of the wiki is highlighted to explain its content and encourage participation from the user community. The French backbone for the ALA wiki is available at the following address: <https://github.com/AtlasOfLivingAustralia/Documentation-en-francais>. The French wiki is a direct translation from the original ALA wiki: the architecture and information content remain the same. Only the language has changed. Up to now, only the main parts have been translated but the remaining pages will be translated in the near future. Fabien Cavière will continue to keep this information up to date, as long as this remains feasible for GBIF France.

Objectives 5 and 7 are associated with the training components of the project. As planned, we prepared and presented a poster describing the results of the collaboration at the TDWG Conference (Ottawa, October 2017). Canadensys also participated with GBIF France, Sweden, Spain and NBN at the ALA Living Atlases Workshop that was held during this conference. Canadensys was a trainer in the ALA workshop in February 2018. Canadensys

is now able to contribute to ALA training and mentoring activities and thus Objective 7 has been attained.

3.2. Post-project activities

Highlight post-project activities if any (e.g. longer-term evaluation, follow-up projects/meetings/training events) and your plans for their completion.

Canadensys was successful in its application to obtain financial support to migrate the basic ALA modules to Cloud resources managed and allocated by Compute Canada. Beginning in May 2018, Canadensys started moving all its applications on the Cloud. In the near future, Canadensys plans to migrate to the Cloud additional applications available in the ALA framework.

GBIF France and Canadensys will also participate in the ongoing translation into French of others applications and of the associated documentation.

4. Project objectives

A list of the objectives included in your original project proposal, and a description of how your project activities contributed to meeting them. . Also include any additional objectives that were defined during the implementation of the project.

The main goal of this technical mentoring activity between GBIF France and Canadensys was to encourage collaboration and to share accumulated technical knowledge at GBIF France with Canadensys in order to facilitate the installation of the ALA-based platform at Canadensys.

As presented in the CESP-funded project, we proposed to achieve the following objectives and associated activities:

1. Rapidly advance Canadensys knowledge of the ALA platform.
2. Give to Canadensys an ALA portal in both official languages, bootstrap 3.0, a dedicated admin interface and all previous data resources usable on local servers or a Cloud server.
3. Transfer and upgrade knowledge of ALA platform in frontend and backend.
4. Improve the installation documentation on GitHub.
5. Present a poster on the process of the GBIF France - Canadensys collaboration during the TDWG 2017 conference.
6. Translate into French the documentation associated with the ALA 2018 international workshop.
7. Prepare Canadensys as a trainer in ALA basic module installations in order to participate and collaborate in the training workshops at TDWG 2017 and in 2018.

To achieve these objectives, a technical mentoring took place in Montréal in July 2017. Marie-Élise Lecocq and Fabien Cavière from GBIF France travelled to Montréal to work with Jérémy Goimard and Carole Sinou at Canadensys. In addition to collaborating on programming for the migration of the Canadensys Explorer to the ALA model, the four colleagues also prepared a poster and discussed planning for the ALA training workshop that they jointly ran during the TDWG 2017 conference held in Ottawa, in October 2017.

An additional objective of the project was to translate the documentation around ALA into French. This contribution will increase the visibility for the community of French speaking nodes. As proposed, and in connection with the CESP 2017/2018 'International Living Atlases workshop' project, we translated all documentation used during the international ALA workshop that took place in Spain in February 2018. The documentation presented and used

at the ALA workshop in February 2018 is now available in the French ALA wiki. All seven objectives have thus been attained.

5. Project deliverables

The original list of deliverables from your project proposal, including a description of the final deliverables produced. Make sure to include sources of verification for each of the deliverables, such as details of data mobilized through the project including DOIs to published datasets, and/or links to re-usable information resources or tools. Alternatively, the deliverables can be attached to the report as an annex.

1. Deployment of a complete standard adapted ALA installation on the Canadensys current structure and preparation of its migration to Cloud infrastructure. <https://github.com/Canadensys/>
2. Creation of the Canadensys page on the ALA-installation folder of the ALA GitHub <https://github.com/AtlasOfLivingAustralia/documentation/wiki/Canadensys-production-environment>.
3. Presentation of a poster to illustrate the new Canadensys Explorer, data portal and to describe the collaboration between Canadensys and GBIF France at TDWG 2017 http://community.canadensys.net/wp-content/uploads/Canadensys-poster_3_s.pdf.
4. Translation in French of all new elements created during the ALA workshop that took place in February 2018 (documentation, web page created, etc.) and translation of ALA documentation into French to improve the visibility of the community around French speaking nodes ([iLink](#)).

6. Project communications

Report on the way the results of your project have been communicated and shared with the project stakeholders and broader GBIF community. Please also review the page describing your project available from <https://www.gbif.org/programme/82219/capacity-enhancement-support-programme/projects>. Highlight any additional documents, events, news items or links that you would like to add to your page.

The general objectives of the project are described on Gbif.org at <https://www.gbif.org/project/83349/francophone-mentoring-and-translation-of-the-open-source-ala-platform>. On this page, the Project leader is Canadensys and the Partner is GBIF France.

As proposed, a technical poster presenting the new Canadensys portal based on ALA, and facilitated by the established collaboration between GBIF France and Canadensys, was presented at TDWG 2017 : http://community.canadensys.net/wp-content/uploads/Canadensys-poster_3_s.pdf . The abstract for this poster is available at [doi: 10.3897/tdwgproceedings.1.17011](https://doi.org/10.3897/tdwgproceedings.1.17011) .

The issue found during the Montréal technical workshop was posted on August 31 2017 on Github by Marie-Élise Lecoq at this address: <https://github.com/AtlasOfLivingAustralia/collectory-plugin/issues/103> .

Canadensys also started participating in the ALA community workshop (<https://twitter.com/davejmartin/status/915601694280572928> , <https://twitter.com/davejmartin/status/915604761906380800>)

Communications were sent to the ALA Community mailing list, starting September 2017, in order to request help from the community and to communicate about the progress of the

project ([follow-up spreadsheet](#)). Then, from September 2017 to March 2018, emails were sent to the ALA mailing list with highlights on new parts of the documentation for new participants and to encourage the community to fill missing parts of the English wiki.

On 17th October 2017, the [Canadensys wiki page](#) was created to the ALA wiki documentation. It was completed a few months later.

The new [Canadensys Explorer reached more than 4 million entries](#) at the beginning of November 2017.

In June 2018, Carole Sinou (Canadensys) presented at the Digital Data Conference (organised by iDigBio) in Berkeley, a talk entitled “[Shifting gears: the challenges of moving Canadensys to a new platform](#)”. She explained the challenges encountered while migrating from the old Canadensys Explorer to the new ALA-based module, emphasising user response, reactions and the training videos we developed to better answer to user needs.

7. Evaluation: lessons learned and best practices

An assesement of the overall outcomes and impacts of your project, including strengths and weaknesses in its implementation and results. If any changes have been made to the project plans please clearly indicate this and the reasons for this. Try to identify your experiences that could help others to design and implement projects more effectively, including the best practices to adopt and the pitfalls to avoid.

The CESP project has been finalised as proposed and all the projected objectives were attained. Canadensys greatly appreciated the mentoring received from GBIF France, their high level of technical competence, professionalism, and their ability and willingness to share their knowledge. Thanks to funding from the GBIF CESP program, a strong collaboration has been developed that will lead to greater visibility both of GBIF and ALA in the French speaking biodiversity community.

Technical Training Workshop (Montréal, July 2017) - The technical workshop was organised with a first day of introductions, presentation of projects, description of objectives to attain and a detailed schedule for the remaining days. This organisation was updated daily to allow time to discuss new issues that arose and to adjust as needed the activities that could be achieved in the time provided. The overall schedule for the five day workshop was divided into three parts. The first part (one day) was a brainstorming period dedicated to the Canadensys context, discussing issues related to the server, to data providers, and datasets. In the afternoon, we worked on ALA documentation. The second part of the Workshop consisted of three technical days during which we focused on:

1. user interfaces (bootstrap3, external layout, comparing GBIF France and Canadensys);
2. data management (link between institutions, collections and occurrences, filters on metadata);
3. data integration (preparing a script that used the GBIF API to load data on the ALA framework);
4. upgrading to allow the flagging of an issue without the CAS module; and
5. improvement of the mapping documentation

The last day of the 5 day Workshop was used to finish a few technical points, prepare the poster and presentation for the TDWG 2017 Conference and planning for future aspects of the project. This tightly structured format was a success and would be a recommendation for such future training sessions.

Although the Canadensys Explorer based on ALA has been in production since October 2017, it is still early to evaluate visitation rates, number of requests, number of downloads, etc. We informed Canadensys users of the change to the new Explorer, explained the reasons for this major modification, and invited users to send us feedback. This was done through our Google Group and via the Canadensys blog and social media (twitter and facebook). During that period, we kept the first Canadensys Explorer alive. User reactions were mitigated, with many users feeling uncomfortable with the numerous new functions and complexity of the ALA based Explorer. For this reason, we created a series of tutorials explaining how to use the Explorer for basic searches (<http://community.canadensys.net/2017/new-canadensys-explorer-get-to-know-it>).

The new ALA Explorer allowed us, as noted above, to increase the number of occurrences, datasets, collections, institutions and data providers. Canadensys also installed the images modules. Canadensys finalised its wiki page in April 2018. This development of Canadensys provided the necessary leverage for a successful application to Compute Canada for our migration to their Cloud resources. The full migration is currently underway, and the basic modules should all be available and functional on the Cloud by September 2018.

The TDWG 2017 Conference was a good introduction and validation for Canadensys as a partner and potential trainer in the ALA community. As mentioned, Canadensys was a trainer in the February 2018 workshop in Spain, and these training workshops will continue, with Canadensys as an active contributor to the community.

The documentation for both the original English and the new French ALA wiki backbones were modified to facilitate use. Nonetheless, we continue to rely on the implication of the ALA community to fully complete the documentation. The French translation is directly related to the general improvement of ALA documentation. Certain new and advanced ALA modules remain to be translated into French.

8. Future plans and sustainability

A description of how the partners involved will build on the results of this project in their future work. This could include future collaborative activities, such as plans to complete any unfinished project activities and how the future impact of the project could be monitored or measured.

In April 2018, Canadensys submitted an application for a new GBIF CESP project (CESP2018-005) for developing training workshops across Canada. Our application was successful and will allow training of users on the ALA and GBIF data portals in 2018 and 2019. GBIF France, in partnership with Canadensys and other members of the ALA community, is also planning a technical workshop on the ALA framework and tools (Paris, 2019). This sister project has also received support from the CESP program (CESP2018-004). Both projects will help beginner and more advanced users to fully benefit from the development of ALA. GBIF France and Canadensys will continue to collaborate in the future to facilitate communication across the francophone community, and whenever possible encourage training workshops in French. We also will continue to collaboratively improve the documentation in French and English.

As a general observation based on this successful collaboration between GBIF France and Canadensys, we think that it would be beneficial for the long term sustainability of the ALA community to consider creating a position for someone who be specifically dedicated to the development of the ALA community. This would be important for technical aspects, as well as to maintain a healthy, viable and working relationships amongst all community members.

9. Signature of the project main contact point

Signed on behalf of the project partners
Date

20 July 2018
