

Project ID: CESP2017-0005 Project Title: GBIF-France and Canadensys Mentoring around Canadensys ALA platform deployment

MID-TERM ACTIVITY REPORT

contents	
Executive summary	1
Contact information	2
Introduction	2
The project and its objectives	2
Project activities completed by mid-term	3
Project communications	4
Mid-term evaluation findings and recommendations for the remaining project implementation period	4

Executive summary

Contonto

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 cloud. The project was initially funded in June 2017.

During the technical mentoring that took place in Montréal in July 2017, we prepared ALA frontend user and administration interfaces in two languages with improvement of admin panel templates, we fully integrated the Canadensys style guide using responsive design, and transfered 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 is that, in the near future, the Canadensys team will itself become a mentor and be capable of transferring knowledge and provide training on basic ALA modules. The new ALA-based Explorer was launched for TWDG 2017. It contains the basic ALA modules (biocache, collectory, images) and the associated web services.

In parallel, we proposed to translate all the documentation around ALA into French, and this work has been initiated, but is not complete. This contribution will increase the visibility for the community of French speaking nodes across the World. In connection with the CESP 2017/2018 project, we will also translate all new modules or elements created during the international ALA workshop planned for February 2018.

Contact information



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Introduction

In this midterm report, we will present a summary of the activities undertaken during the workshop in Montreal. We will also present what was achieved at the TDWG 2017 workshop organised by the CESP "Living Altases Workshop", in conjunction with the present CESP project. Finally, we will indicate what activities and objectives still remain to be attained before the end of the project. Usage statistics of the new Canadensys Explorer, other statistics and a general assessment of the success of the established collaboration will be evaluated at the end of the project.

The project and its objectives

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 with two 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 Exp



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. In connection with the CESP 2017/2018 project, we also plan to translate all new modules or elements created during the international ALA workshop planned for February 2018. We have begun working on the translation of these two components, but the translation is part of the second phases of the project. Our objective is to finalise the translation of the ALA documentation by May 2018. The components developed at the ALA workshop in February 2018, will be available in French by June 2018.

Project activities completed by mid-term

As planned in **Objectives 1-3** of the CESP project proposal and during the technical training workshop (Montréal, July 2017), 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 on this address: <u>http://explorer.canadensys.net</u>, the images module is available on this address: <u>http://images.canadensys.net</u> and the collectory module is available on this address: <u>http://collections.canadensys.net</u>. We 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 was reported on Github in August 2017.

Objectives 4 and 6 were 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), and whose purpose is to complete and improve this part of the project, was created for this purpose: it contains all parts of the wiki and their status. In addition, once per month one part of the wiki is highlighted to explain what information it contains.

The French backbone for the ALA wiki will be available, in the future, at the following address: <u>https://github.com/AtlasOfLivingAustralia/Documentation-en-francais</u>. The working document for this Objective of the project can be seen at <u>https://github.com/CaviereFabien/Documentation-ALA/wiki/accueil</u>

Objectives 5 and 7 are associated with the training components of the project. As planned, we prepared and presented a poster of 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. In addition, Canadensys will be a trainer in the ALA workshop in February 2018. **Objective 7** has thus been attained because Canadensys is now able to contribute to ALA training and mentoring activities.

Project communications



The general objectives of the project are described on Gbif.org at <u>https://www.gbif.org/project/83349/francophone-mentoring-and-translation-of-the-open-sourc e-ala-platform</u>.

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 during the TDWG 2017 :

<u>http://community.canadensys.net/wp-content/uploads/Canadensys-poster_3_s.pdf</u>. The abstract for this poster is available at <u>doi: 10.3897/tdwgproceedings.1.17011</u>.

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

Canadensys has also started to participate in ALA community workshop (<u>https://twitter.com/davejmartin/status/915601694280572928</u>, <u>https://twitter.com/davejmartin/status/915604761906380800</u>)</u>

The first help request on ALA community was made on 6 September 2017 by the GBIF Ala-portal mailing. It was followed by a second email on 16 October 2017 with a Google Excel sheet

(https://docs.google.com/spreadsheets/d/1e1Y9R_vUUXbO5drE11CZIZS0wTOme-CcBGLL RI1HVoo/edit#gid=1805639524)

On 17th October 2017, the Canadensys wiki page was added to the ALA wiki documentation (<u>https://github.com/AtlasOfLivingAustralia/documentation/wiki/Canadensys-production-environment</u>).

The new Canadensys Explorer reached more than 4 million entries at the beginning of November (<u>https://twitter.com/Canadensys/status/927914323342774272</u>).

Mid-term evaluation findings and recommendations for the remaining project

implementation period

Mid-term general evaluation: To date the CESP project as proposed, has been going well and the projected objectives have been 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 of 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 day 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.

Although the Canadensys Explorer based on ALA is now in production, it is too early to evaluate it with respect to visitation rates, number of requests, number of downloads, etc. This evaluation will take place at the end of the project. As noted above, we already have increased the number of occurrences, datasets, collections, institutions and data providers on the ALA basic modules. Canadensys has also installed the images modules. In November 2017, Canadensys submitted a grant application to support the migration of Canadensys on the Compute Canada cloud. Canadensys plans to finalise its wiki page by January 2018.

The TDWG 2017 Conference was a good introduction and validation for Canadensys as a partner and potential trainer in the ALA community. These training workshops will continue, with Canadensys as an active contributor to the community.

The modification of the documentation for the wiki backbone has also been initiated and is well under way. We now count on the implication of the community to fully complete the documentation. The French translation is directly related to the general improvement of ALA documentation, and is the focus of the second portion of this project.