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# **CRFM PORTAL – USER AND ADMINISTRATOR GUIDE**

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**CRFM Secretariat  
2019**



## **CRFM Technical & Advisory Document - Number 2019 / 17**

### **CRFM Portal - User and Administrator Guide**

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The Fishery-Related Ecological and Socio-Economic Assessments of the Impacts of Climate Change and Variability consultancy has been conducted with support from the Regional Track of the Pilot Programme for Climate Resilience (PPCR) in the Caribbean, which is executed by the University of the West Indies, Mona (UWI), through its Mona Office of Research and Innovation (MORI); and co-implemented by the Caribbean Regional Fisheries Mechanism (CRFM) with resources provided by the Climate Investment Fund (CIF) through the Inter-American Development Bank (IDB)”

CRFM Secretariat  
Belize, 2019

# **CRFM TECHNICAL & ADVISORY DOCUMENT – Number 2019 / 17**

## **CRFM Portal - User and Administrator Guide**

*@ CRFM 2019*

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## **A. Introduction**

### **1. DOCUMENT SCOPE AND AUDIENCE**

This document is a guide to using, managing, and maintaining the Caribbean Regional Fisheries Mechanism's data and information portal.

This document is primarily intended for CRFM technical and project management staff and the fisheries management staff of the CRFM's member nations.

Many of the portal's functions are reasonably straightforward and can be learned through interaction with the site. This document is intended to provide a more complete understanding of the functions and organization of the portal so that those who repeatedly use the portal can do so more efficiently and effectively.

At the time of writing, the portal primarily contained data and information derived from the CRFM-led marine sub-component of Caribbean Regional Track of the Pilot Programme for Climate Resilience (PPCR) and from the Flyingfish Sub-Project implemented under the Caribbean Large Marine Ecosystem Plus (CLME+) Project. As the portal is used more widely this scope is expected to increase.

### **2. ADDITIONAL DOCUMENTATION**

The CRFM portal is built on top of the CKAN data portal framework. Most of the documentation available for CKAN is applicable to the CRFM portal. If you have questions that are not answered in this guide, or require more detailed information, please consult that documentation.

CKAN User guide: <https://docs.ckan.org/en/2.8/user-guide.html>

CKAN Maintainers guide: <https://docs.ckan.org/en/2.8/maintaining/index.html>

CKAN Sysadmin guide: <https://docs.ckan.org/en/2.8/sysadmin-guide.html>

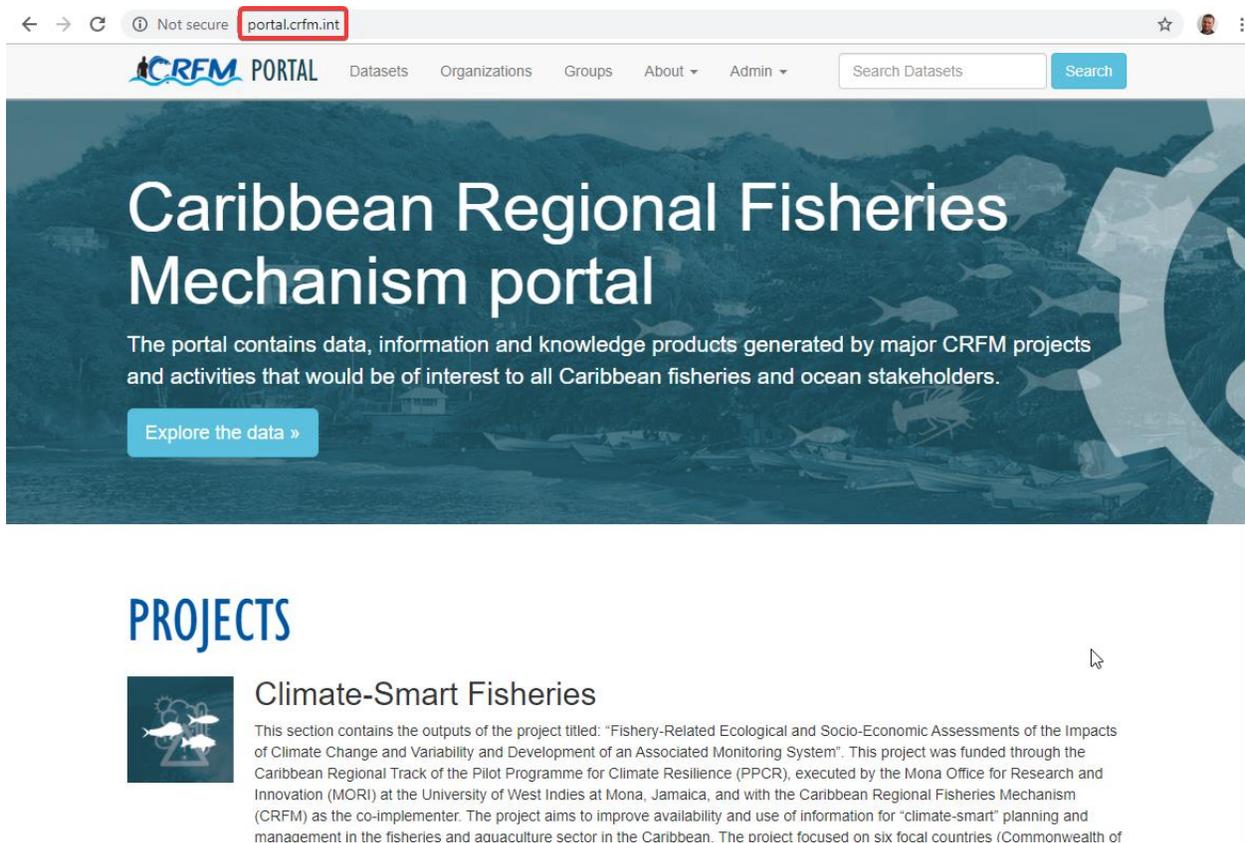
## B. Using the portal

### 1. ACCESSING

Anyone can access the portal to search for and download public data and documents.

To upload to the site or view private data and documents you need to have an account.

To access the site go to [portal.crfm.int](http://portal.crfm.int).



The screenshot shows a web browser window with the address bar displaying "portal.crfm.int". The website header includes the "CRFM PORTAL" logo and navigation links for "Datasets", "Organizations", "Groups", "About", and "Admin". A search bar with the text "Search Datasets" and a "Search" button is also present. The main content area features a large banner with the title "Caribbean Regional Fisheries Mechanism portal" and a sub-headline: "The portal contains data, information and knowledge products generated by major CRFM projects and activities that would be of interest to all Caribbean fisheries and ocean stakeholders." Below this is a blue button labeled "Explore the data »".

### PROJECTS

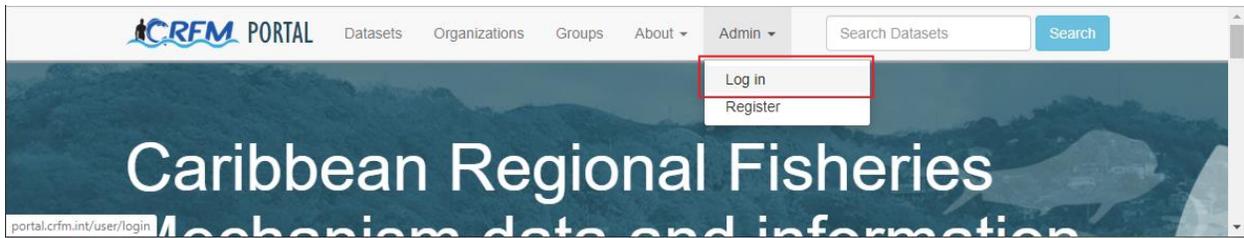
**Climate-Smart Fisheries**

This section contains the outputs of the project titled: "Fishery-Related Ecological and Socio-Economic Assessments of the Impacts of Climate Change and Variability and Development of an Associated Monitoring System". This project was funded through the Caribbean Regional Track of the Pilot Programme for Climate Resilience (PPCR), executed by the Mona Office for Research and Innovation (MORI) at the University of West Indies at Mona, Jamaica, and with the Caribbean Regional Fisheries Mechanism (CRFM) as the co-implementer. The project aims to improve availability and use of information for "climate-smart" planning and management in the fisheries and aquaculture sector in the Caribbean. The project focused on six focal countries (Commonwealth of

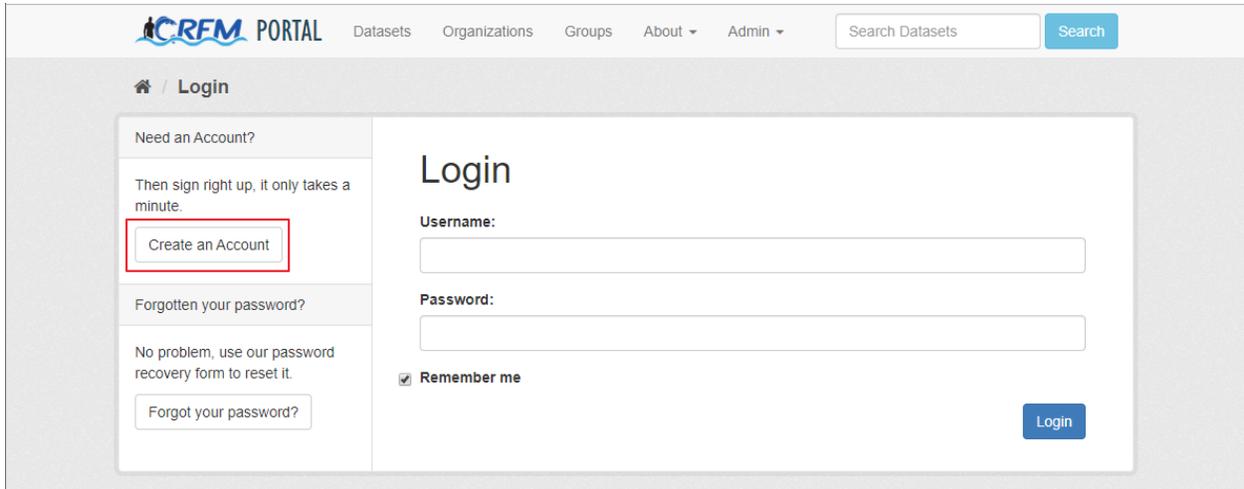
### *Getting an account*

An administrator can provide you with an account. Contact information for the CRFM is located [here](#). Additional contact information is in **Hosting details and contacts**, below.

Alternatively, you can sign yourself up directly on the site, but if you do so your user account will only have limited permissions until an administrator assigns you to an **Organization** (see **Organizations** in the **Data Structure** section below). If you still want to do so, click on the "Admin" link in the top navigation bar of the site and select "Login".

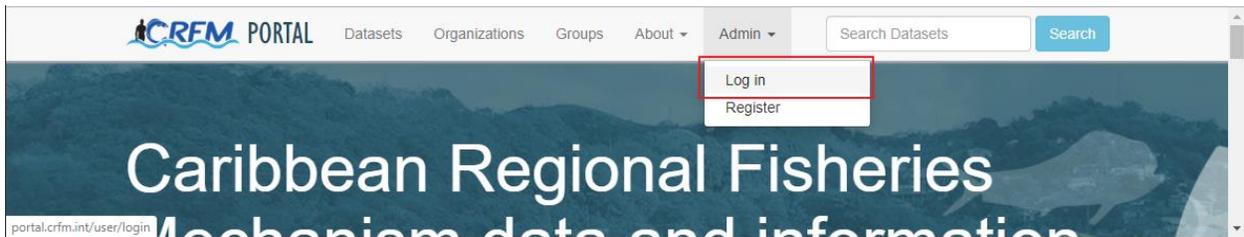


Then in Login page, click the “Create an Account” button and complete the “Register for an Account” form.



### *Signing in*

To sign into the site click on the Admin link in the top navigation bar and select “Log in”.



Or go directly to this link: <http://portal.crfm.int/user/login>

### *Changing your name, email, or password*

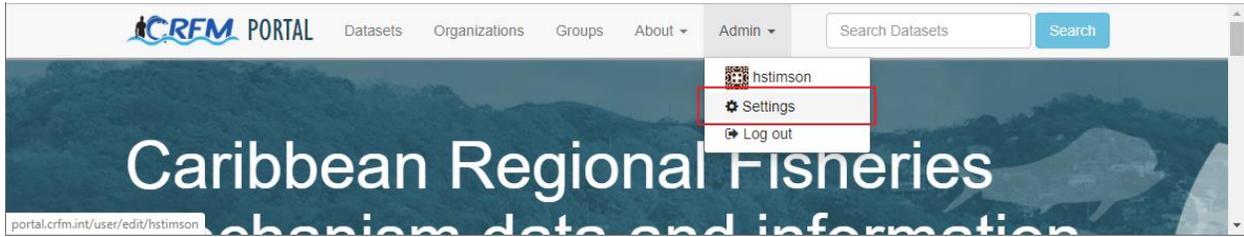
If you are invited to join the data portal via an email, your username will have been auto-generated based on your email address and will have a random number attached to it.

When you first click on the link in the invitation email you will have an opportunity to change your username and your password. **Note that this is the last chance you will have to change your auto-generated username to one you prefer.**

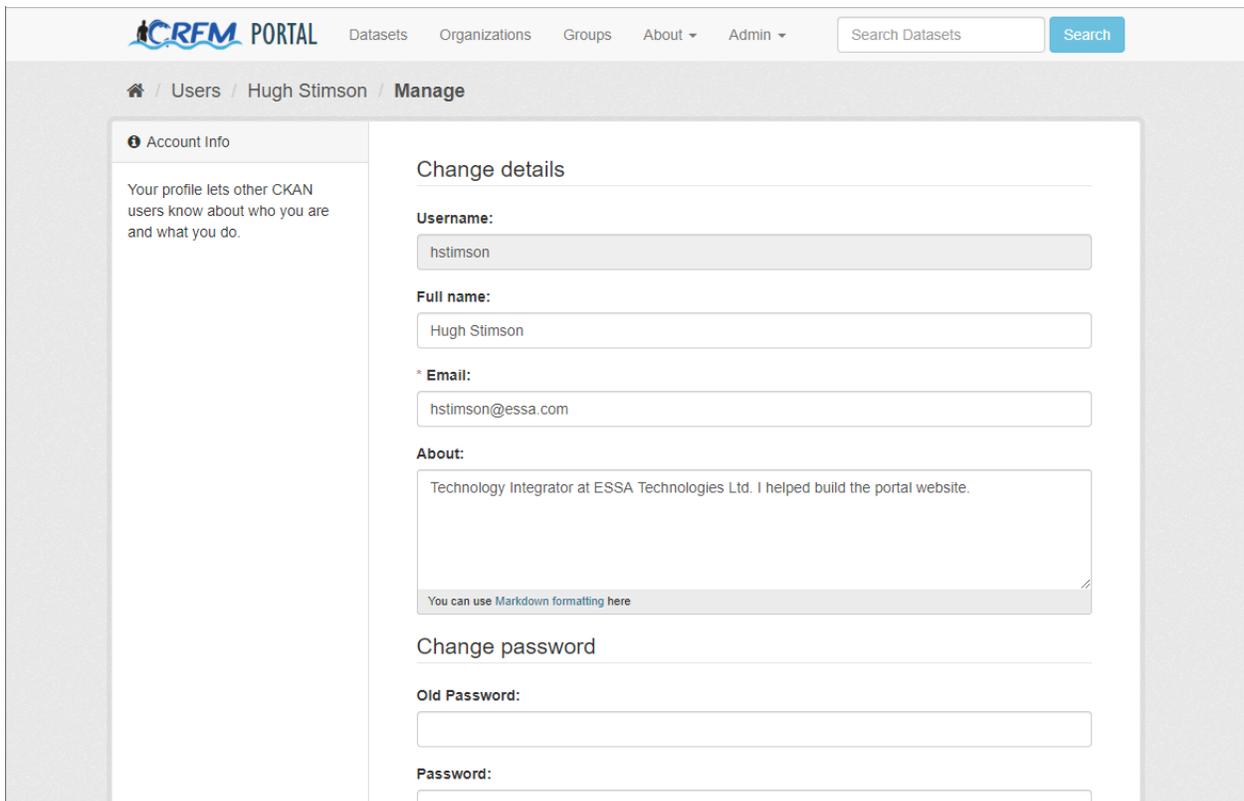
You can however provide and edit a first and last name whenever you wish, which will be used for display purposes on the site.

To edit your first/last names and password:

- Click on the Admin drop-down in the top navigation bar.
- Click on the Settings link in the drop-down menu.



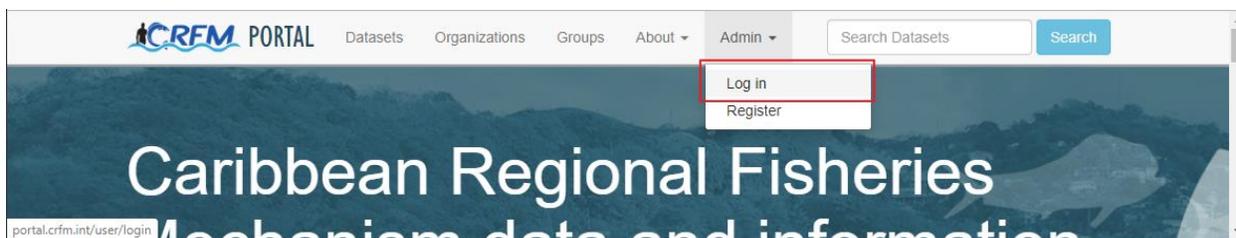
On this page you can change the email address associated with your account, your password, provide a full name and add a short “About” bio.



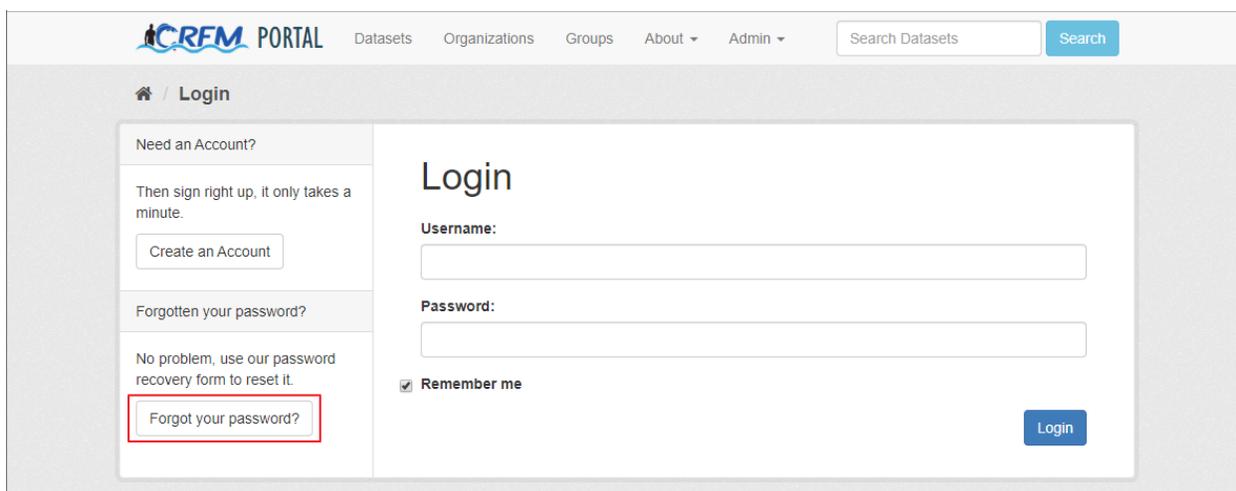
### ***Resetting your password***

If you’ve forgotten your password you can create a new one, as long you have access to the email address you used with your account.

Click on the Admin link in the top navigation bar and select “Log in”.



Then click on the “Forgot your password?” button to the left of the Login form.



Or go directly to this link: <http://portal.crfm.int/user/reset>.

## 2. PERMISSIONS

User accounts have permissions within Organizations. The three levels of permissions are:

<i>Member</i>	Can view private Datasets belonging to the Organization.
<i>Editor</i>	Can add new Datasets and Resources to the Organization. A user must have Editor permission in at least one Organization to be able to add content to the portal. Editors also edit existing Datasets and Resources that belong to that Organization.
<i>Administrator</i>	Can add new users to the Organization.

Note that a single user account can possess different permissions levels in different Organizations, i.e., a user could be an Administrator in the CRFM Organization with the ability to add new members but might also be a Member of the Jamaica organization, with the ability to view Datasets that are private to Jamaica, but not the ability to add new ones.

Note also that in addition to these explicit permissions assigned to user accounts, the general public has the implicit permission to view all public entries on the portal, even without signing in.

Note also that there is an additional “systems administrator” level of permission that is independent of Organizations and which is intended for the maintenance of the portal as a whole. Those functions are discussed in **Systems administration**, below.

### 3. DATA STRUCTURE

The portal organizes documents in a specific way, based on **Organizations**, **Groups**, **Datasets** and **Resources**. It will help to understand each of these things and how they're related if you're trying to find content within the portal or add new data to the portal. A description of each is below.

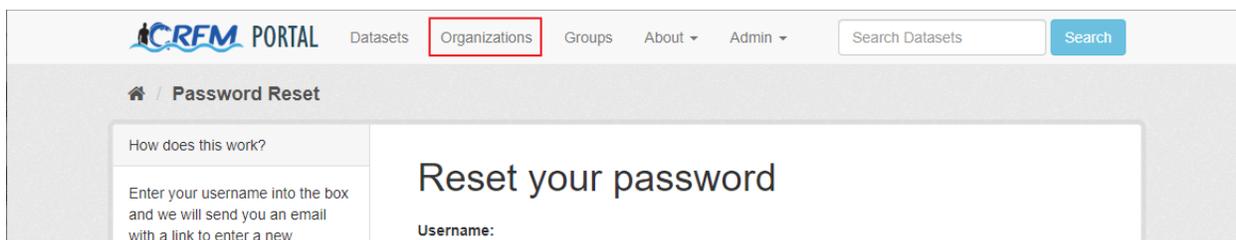
Datasets are also assigned metadata such as **Sector**, **Type**, **Tag**, and **Species Group**, and these values can also be used to sort and filter the data. Descriptions of the metadata choices are in **Metadata definitions** below.

#### *Short summary*

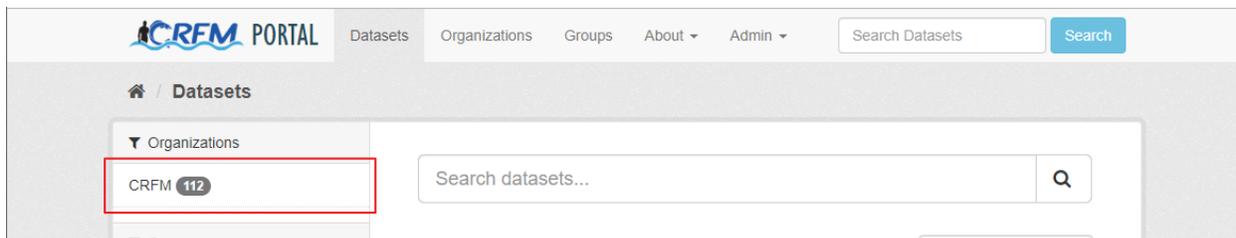
All content on the site will belong to an **Organization**, and most should belong to a project **Group**. All content is made up of **Datasets** containing **Resources**.

#### *Organizations*

Each dataset in the portal belongs to one organization, and users can get a list of all of the datasets belonging to a given organization by clicking the "Organizations" link in the top navigation bar



or by clicking on an Organization's name in the left sidebar of the Datasets page.



At the time of writing the Organizations present in the portal were the 6 nations contributing to the fisheries adaptation project, the CRFM, and the OECS. More organizations could be added in the future. In order to add new content to the portal, your user account needs to belong to at least one Organization. If your user account was created for you it will likely have been assigned by the systems administrator into an Organization. Alternatively, if you created your user account yourself you will need to ask an administrator to add it to the appropriate Organization.

Having your user account associated with an Organization has only one effect: when you're adding a new dataset to the portal you will be able to assign the dataset to that Organization. See **Add data and documents** below for more information about adding datasets.

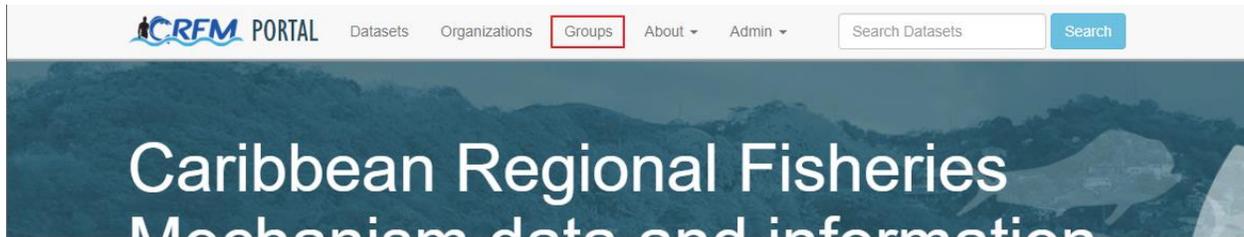
#### *Groups*

Groups are another method used to organize datasets within the portal. Unlike Organizations, Groups are meant to be collections of the output from individual projects or parts of projects, which could have involved the participation of multiple organizations.

Unlike Organizations, any user can assign data into any Group.

Unlike Organizations, a dataset can belong to multiple Groups at the same time.

Similar to Organizations, Groups can be accessed by clicking on the Group link in the top navigation bar or by clicking on a given group in the left-hand filter bar in the Datasets page.



### Datasets

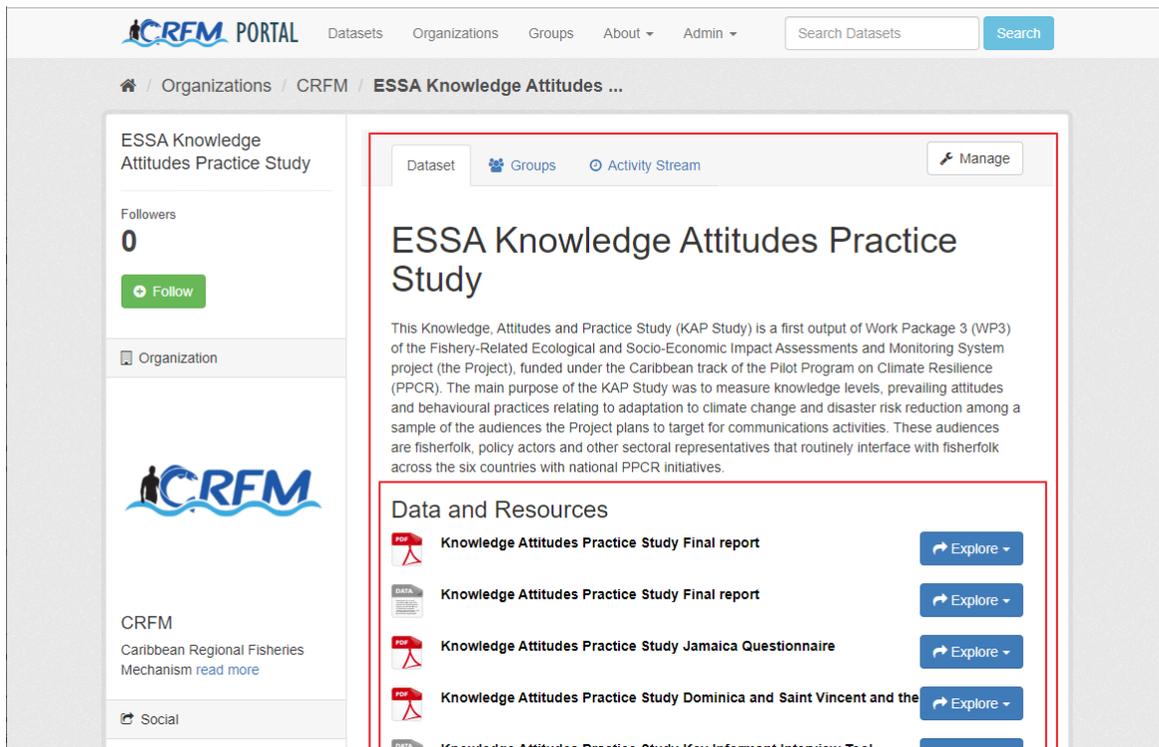
Datasets are collections of related Resources. For example, a single Dataset might contain three Resources: an Excel spreadsheet, a Word document explaining the content of the spreadsheet, and also a URL linking to further background reading on another agency's website.

### Resources

Resources are individual files that are stored within the portal. These files might hold data (such as spreadsheets or GIS format files) or they could be documents such as reports or manuals.

Each Resource has some metadata associated with it. See **Metadata definitions** below for more information.

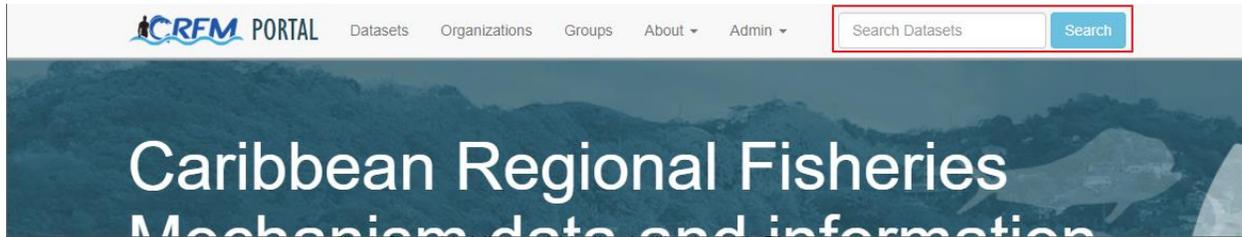
Each Resource belongs to a Dataset.



## 4. FINDING DATA AND DOCUMENTS

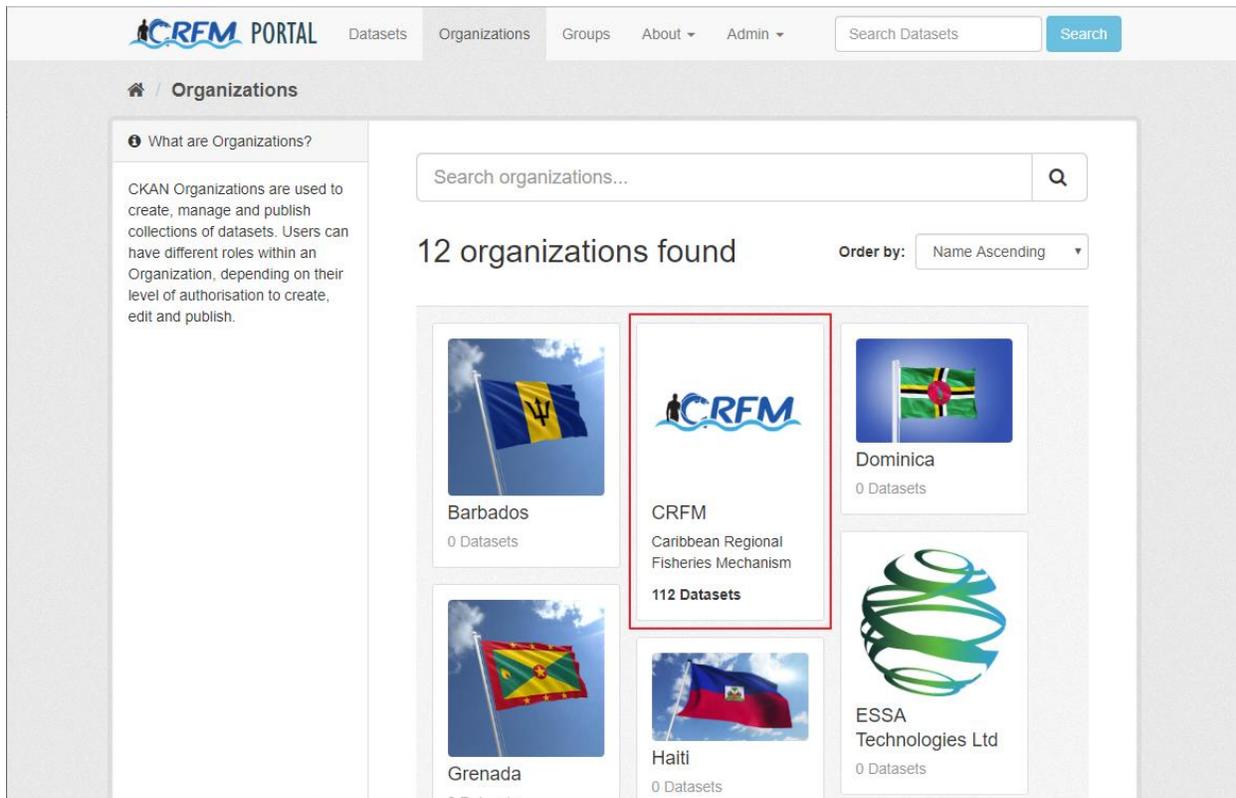
### Searching

The simplest way to find data and documents is to use the search field in the top navigation bar.

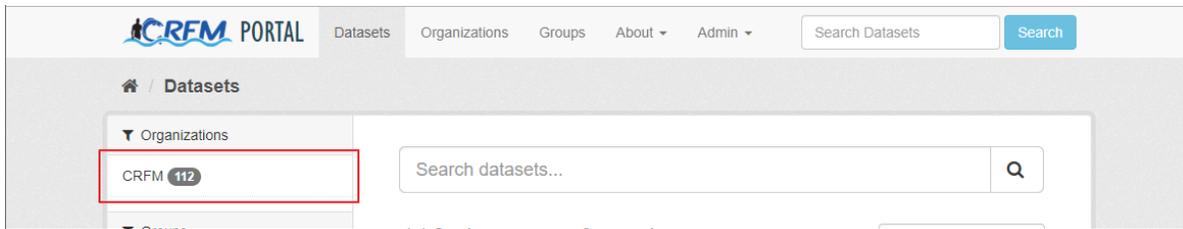


### Filtering by Organization or Group

Datasets can also be filtered down to those belonging to particular Organizations or Groups. This can be done either by clicking on the Organization or Group link in the top navigation bar, and then clicking on the tile for a specific Organization or Group in the page that opens.



Alternatively, you can go to the [Datasets page](#) and click on one of the Organization or Group names in the left-hand sidebar to filter the displayed datasets.



### Filtering by metadata

Any of the metadata fields that appear in the left-hand sidebar in the Datasets page can be used to filter the displayed Datasets in a manner similar to Organizations and Groups described above.

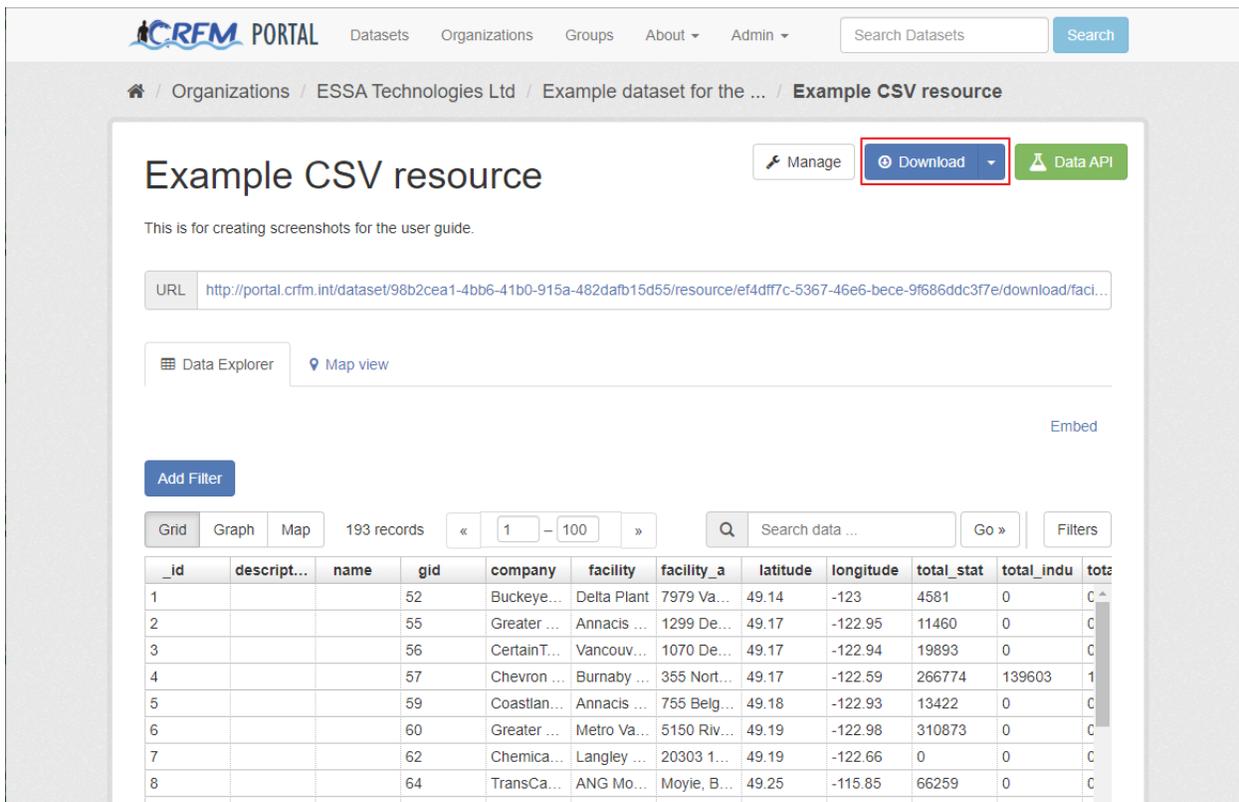
The metadata fields available in the left-hand filter bar are:

- Types
- Tags
- Species groups
- Licenses
- Formats

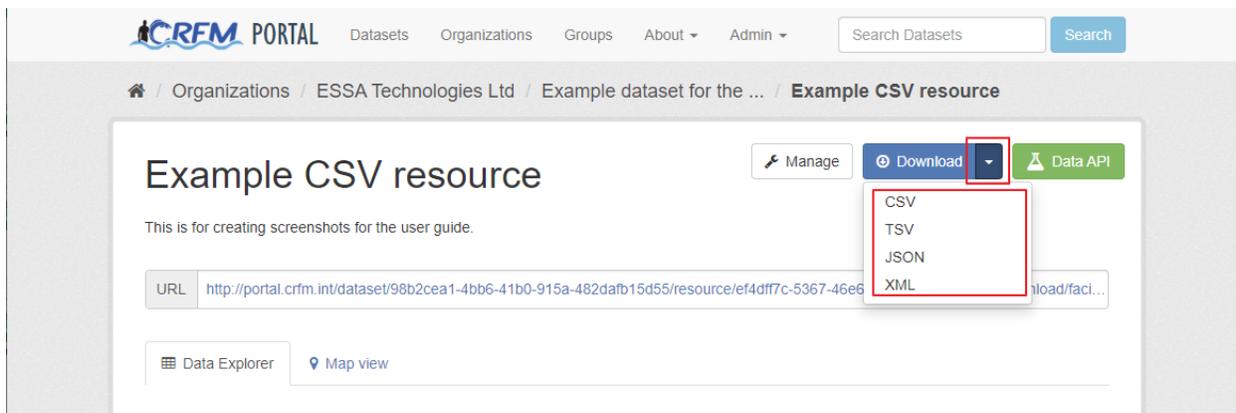
### Downloading files

Once you have located and selected a Dataset and associated Resources, you can download the Resource files to your computer.

To do so: click on the “Download” button near the top right of the main content area.



Depending on the original format of the file, you may be able to download a version in a different format. If a down arrow is present in the “Download” button, click on it to display available formats, and click on your preferred format to download it.



## 5. ADDING DATA AND DOCUMENTS

### *Metadata definitions*

The CRFM data portal uses a specific and somewhat elaborate set of metadata to describe each dataset and resource it contains. This is due to its original purpose as a repository for data from the Fishery-Related Ecological and Socio-Economic Assessments of the Impacts of Climate Change and Variability consultancy. Many of these metadata fields should however be useful in systematically describing data and documents that come from other CRFM projects.

Note that these metadata are separately present for both datasets and the resources they contain. In many cases, especially where there is one or a single resource within a dataset, there will be complete overlap between the metadata for the dataset and resource and it will only be necessary to fill in metadata at the dataset level. In other cases a dataset may contain a number of resources of different types with different authorships, ownerships, dates, and license information. The most common situation will be where a dataset contains a number of reports with different authorship along with data resources which may have specific restrictions attached to them. To cover this situation users have the option of specifying metadata fields at the resource level as well as the dataset level.

<b>Field</b>	<b>Description</b>	<b>Example</b>
<i>Title</i>	One line title for the dataset or resource.	
<i>Description</i>	Brief description of the dataset or resource	
<i>Tags</i>	One or two word descriptors added to help in searching for and finding information.	Habitat Suitability, Fisheries Management Plan, Stakeholder Analyses
<i>License</i>	Select one of the license types that is to be used when sharing the information in this dataset or resource.	Creative Commons Attribution
<i>Organization</i>	Organization in the data portal that is responsible for this dataset	

<b>Field</b>	<b>Description</b>	<b>Example</b>
<i>Visibility</i>	Who can see this information	Public or Private
<i>Source/Provider Institution</i>	Source of the data or information in this dataset or resource	
<i>Source URL</i>	Location URL if there is related available publicly on the internet.	
<i>Type</i>		
<i>Sector</i>	Broad grouping of types of information and reports	Ecological, Social, Communications, Management
<i>Category</i>	Broad Taxonomic group	Fish, Algae, Invertebrate, Marine Mammal
<i>Habitat</i>	Used to distinguish broad groupings of species and their habitats.	Coastal, Pelagic, or empty
<i>Species group</i>	A free format field used to enter the names for groups of species. This is typically used for the mapped habitat suitability data.	Beloniformes (Flyingfish, Halfbeaks)
<i>Economic group</i>	Grouping used for Habitat Suitability mapping	Pelagic – other than tuna & billfishes
<i>Restrictions on use</i>	Free format field to contain any specific restrictions on the use of this information in addition to the specified license type.	
<i>Publication/creation date</i>	Date of publication or first release	Must contain day, month, and year. If day or month is not known, then use day 01 and month January.
<i>Last update date</i>	Date of most recent update of data or report. Leave blank if there have been no updates.	01 May 2018
<i>Version</i>	Version number typically used for data and databases	1.1
<i>Status</i>	Draft or final	
<i>Author</i>	Name of author or author institution	CRFM
<i>Author Email</i>		
<i>Maintainer</i>	For databases and data sources that are actively maintained, the name of the person or institution responsible. Leave blank if not required.	
<i>Maintainer Email</i>		
<i>Owner</i>	Name of person or institution who is the formal owner of the information in this dataset or resource.	
<i>Owner email</i>		

### Adding new data

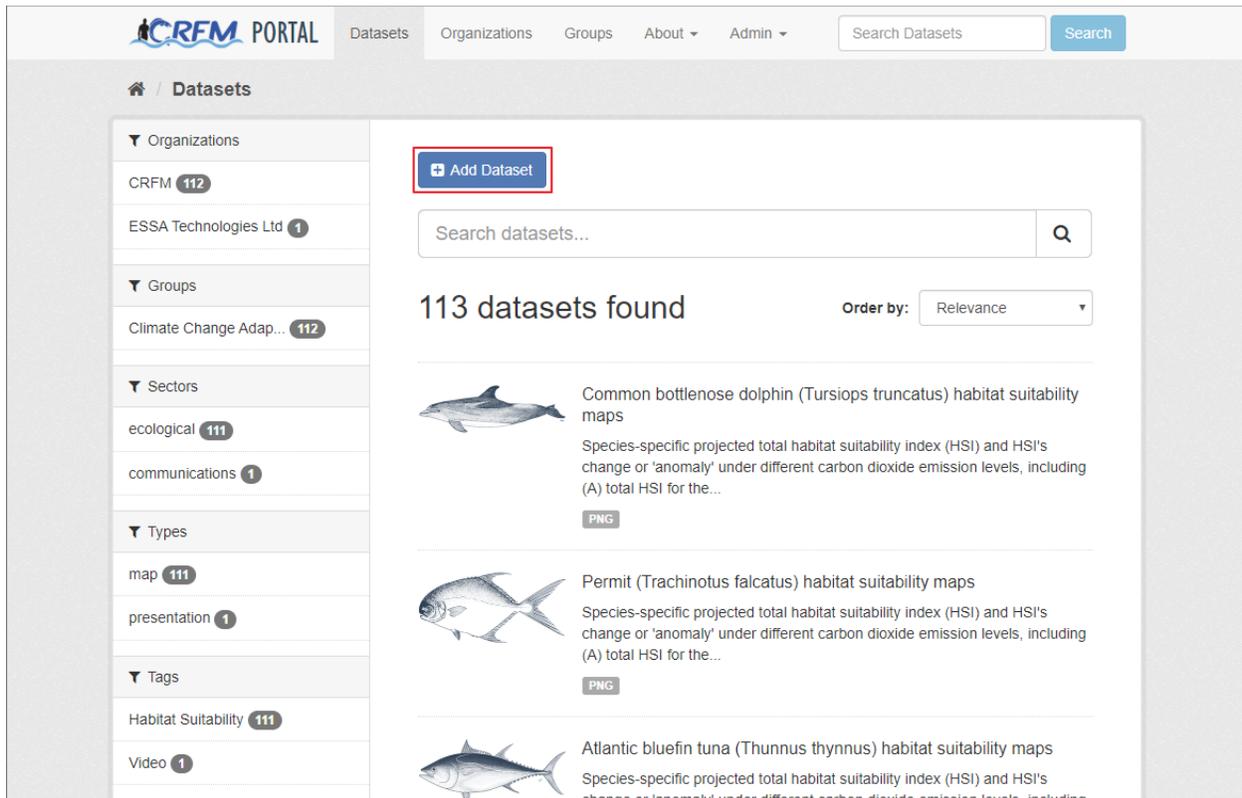
To add a new dataset to the portal you must:

- Have a user account.
- Be signed in.
- Have either “editor” or “administrator” rights in at least one Organization.

See **Data structure**, above, for more information about Organizations.

To add a dataset, go to the [Datasets page](#) by clicking on the link in the top navigation bar.

If all of the above conditions have been met, you will see an “Add Dataset” button. Click it to begin.



There are two steps to adding new content:

- 1) Add a new dataset.
- 2) Add resources to the dataset.

Resources are individual files (usually), Datasets are a linked collection of Resources. See **Resources** and **Datasets** in the **Data structure** section above for further details.

When you click the “Add Dataset” button you will see a form for describing the new Dataset.

Keep in mind this is not a description of the individual file you are going to add, but rather the collection of files. If you’re only going to be adding a single file then you will presumably enter the same values for the fields in both the Dataset and Resource creation forms.

For details about each of the form fields see **Metadata definitions** above.

In the Description field, special formatting such as headers and bulleted lists can be optional using “Markdown” formatting. There’s a link at the bottom of the Description text box with some common usages, and a more complete description of Markdown and its syntax is here: <https://daringfireball.net/projects/markdown/>

You will need to select an **Organization** from the drop-down list. Only Organizations that your user account is associated with will be available.

Note also that you will need to choose whether the Dataset will be “public” or “private”. Public Datasets can be viewed by anyone who visits the website. Private datasets can only be viewed by users who are logged in and belong to the same Organization as the Dataset.

Note also that you will typically want to choose a Group to assign the Dataset to (see **Data structure** above).

Once you have filled in as many fields as are relevant and/or for which you have information, click the “Next: Add Data” button at the bottom of the form to create the Dataset and move on to the next step.

Joe Bloggs

**Maintainer Email:**  
joe@example.com

**Owner:**

**Owner email:**  
joe@example.com

The data license you select above only applies to the contents of any resource files that you add to this dataset. By submitting this form, you agree to release the *metadata* values that you enter into the form under the Open Database License. \* Required field

**Next: Add Data**

Language: English

Maintained by the Caribbean Regional Fisheries Mechanism. Powered by ckan

The form for adding a Resource is very similar to the Dataset form you just completed, with the important addition of the “Upload” and “Link” buttons in the topmost “File:” section.

CREM PORTAL Datasets Organizations Groups About Admin Search Datasets Search

Home / Datasets / Create Dataset

**What's a resource?**  
A resource can be any file or link to a file containing useful data.

**1 Create dataset** **2 Add data**

**File:**  
Upload Link

**Name:**  
eg. 2019 catch data

**Description:**  
Some useful notes about the data  
You can use Markdown formatting here

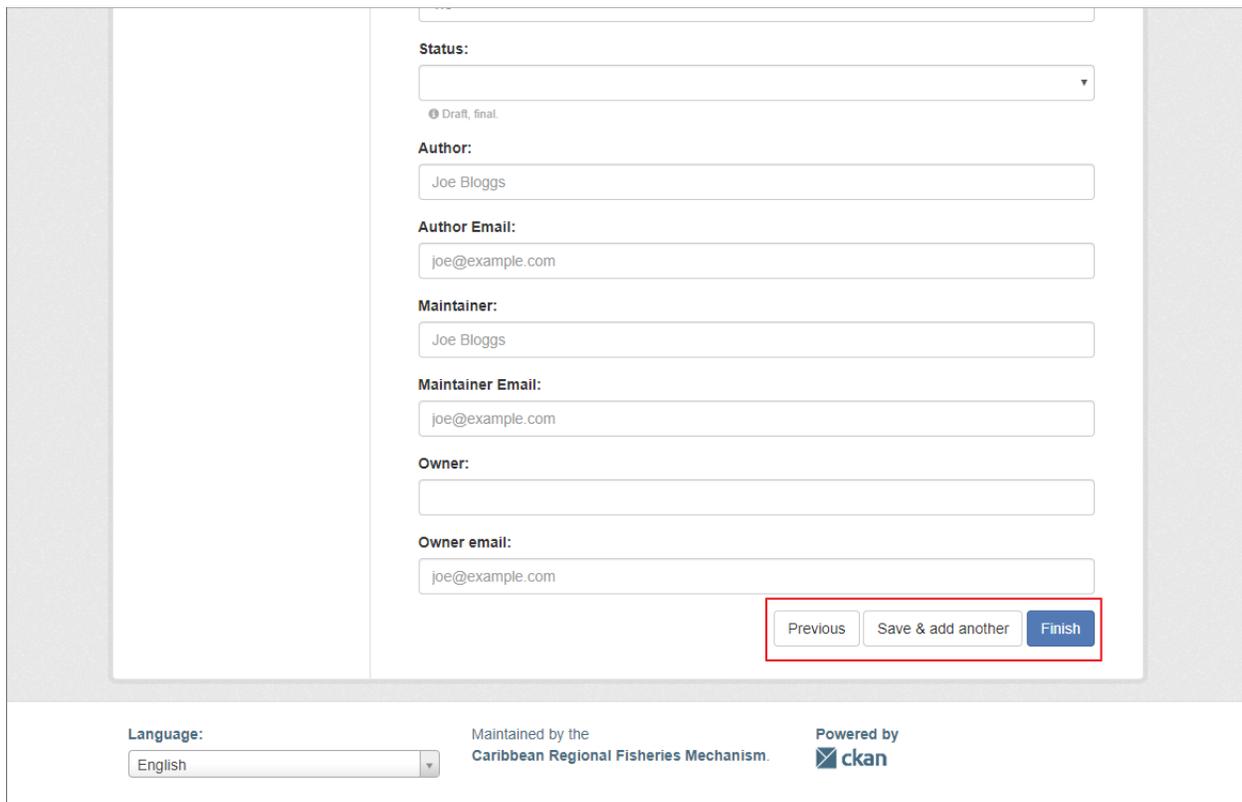
**Format:**  
eg. CSV, XML or JSON

**Type:**  
Map, scripts and codes, report, etc.

**Sector:**

In most cases you will be storing the file directly in the portal, so use the “Upload” button. If the relevant file is located outside of the portal and you want to link to it instead of uploading it, you can alternatively use the “Link” button. Otherwise the metadata fields are the same as for Resources (see above). Only fill in those metadata fields that are different from those associated with the dataset.

Once you have completed the form you have the option of either finalizing this Resource and adding an additional Resource to the same Dataset (“Save & add another”) button, or finalizing this Resource and returning to the data list page (“Finish” button).



The screenshot shows a form for creating a resource. The form includes the following fields:

- Status:** A dropdown menu with a downward arrow.
- Author:** A text input field containing "Joe Bloggs".
- Author Email:** A text input field containing "joe@example.com".
- Maintainer:** A text input field containing "Joe Bloggs".
- Maintainer Email:** A text input field containing "joe@example.com".
- Owner:** An empty text input field.
- Owner email:** A text input field containing "joe@example.com".

At the bottom right of the form, there are three buttons: "Previous", "Save & add another", and "Finish". The "Save & add another" and "Finish" buttons are highlighted with a red rectangular box.

Below the form, there is a footer section with the following elements:

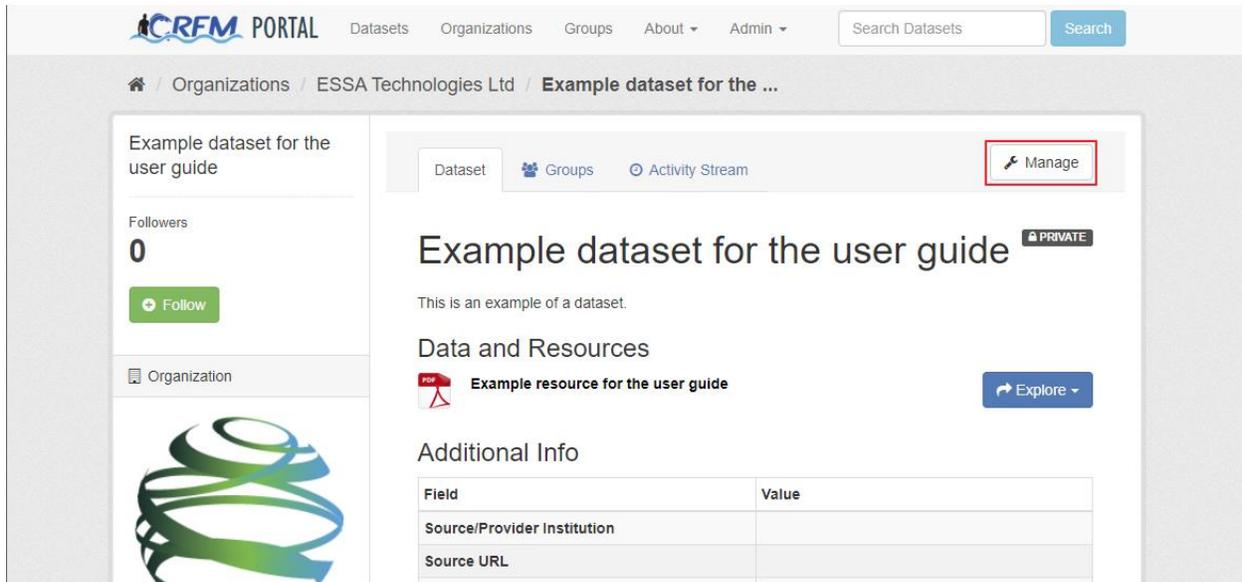
- Language:** A dropdown menu set to "English".
- Maintained by the Caribbean Regional Fisheries Mechanism.**
- Powered by ckan** (with the CKAN logo).

### *Adding a Resource to an existing Dataset*

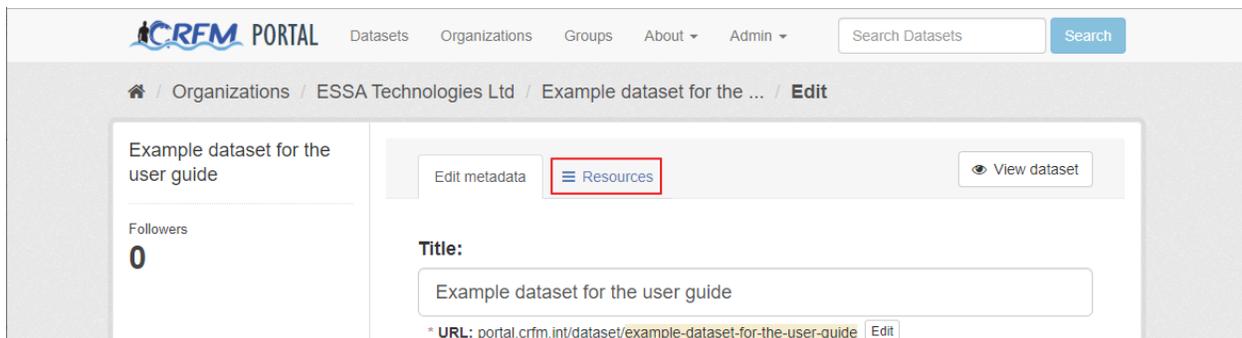
Once a Dataset has been created, you can add as many file Resources to it as you wish, either at the same time as you create the Dataset or at any time afterwards.

To add a new Resource to a previously created Dataset you must have an account with the same permissions as described in **Adding new data**, above. Then,

- Go to the Datasets page by clicking on the relevant link in the top navigation bar.
- Find and click on the Dataset you wish to add to.
- Click the “Manage” button above and to the right of the title of the Dataset.

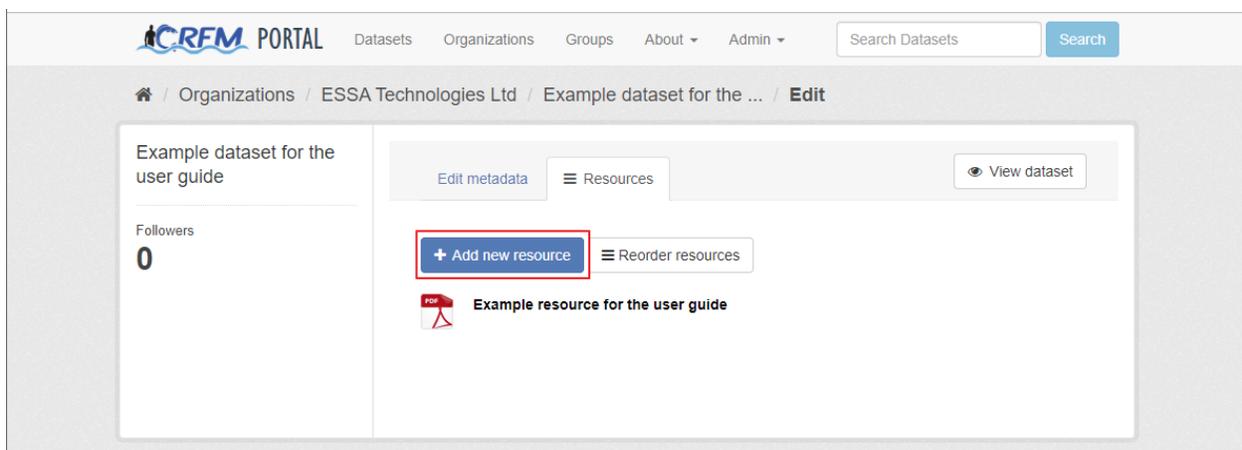


- Click on the “Resources” tab.



- Click the “Add new resource” button.

From here the process is the same as adding a Resource immediately after creating the Dataset (see above).



### Adding a View to a Resource

By default, each Resource is presented with a title and some additional metadata, and a link to download the file.

For certain types of files the content of the file can be displayed directly in the web page by adding a “View”.

Views are added to Resources. Some views are added to Resources automatically when they are first saved. Other views can optionally be added after the Resource has initially been created and saved.

To add a View:

- From the Dataset page that contain the resource, click on the Resource name to open that Resource’s page.

The screenshot shows the CRFM Portal interface. The top navigation bar includes 'CRFM PORTAL', 'Datasets', 'Organizations', 'Groups', 'About', and 'Admin'. A search bar is present on the right. The breadcrumb trail indicates the current location: 'Organizations / ESSA Technologies Ltd / Example dataset for the ...'. The main content area is divided into a left sidebar and a main panel. The sidebar shows the dataset title, 0 followers, a 'Follow' button, and the organization 'ESSA Technologies Ltd' with a logo and description. The main panel has tabs for 'Dataset', 'Groups', and 'Activity Stream', along with a 'Manage' button. The dataset title is 'Example dataset for the user guide' with a 'PRIVATE' lock icon. Below the title, there is a description and a section for 'Data and Resources' containing two items: 'Example resource for the user guide' (PDF) and 'Example CSV resource' (CSV). The CSV resource is highlighted with a red box and has a description: 'This is for creating screenshots for the user guide.' Below this is an 'Additional Info' section with a table.

Field	Value
Source/Provider Institution	
Source URL	
Type	
Sector	
Category	
Habitat	
Species group	

In this example, note that a tabular view of the .CSV data file was automatically added:

CRFM PORTAL Datasets Organizations Groups About Admin Search Datasets Search

Organizations / ESSA Technologies Ltd / Example dataset for the ... / Example CSV resource

Example CSV resource Manage Download Data API

URL: http://portal.crfm.int/dataset/98b2cea1-4bb6-41b0-915a-482dafb15d55/resource/ef4dff7c-5367-46e6-bece-9f686ddc3f7e/download/facilitie...

This is for creating screenshots for the user guide.

Data Explorer Embed

Add Filter

Grid Graph Map 193 records « 1 - 100 » Search data ... Go » Filters

_id	descript...	name	gid	company	facility	facility_a	latitude	longitude	total_stat	total_indu	tots
1			52	Buckeye...	Delta Plant	7979 Va...	49.14	-123	4581	0	C
2			55	Greater ...	Annacis ...	1299 De...	49.17	-122.95	11460	0	C
3			56	CertainT...	Vancouv...	1070 De...	49.17	-122.94	19893	0	C
4			57	Chevron ...	Burnaby ...	355 Nort...	49.17	-122.59	266774	139603	1
5			59	Coastlan...	Annacis ...	755 Belg...	49.18	-122.93	13422	0	C
6			60	Greater ...	Metro Va...	5150 Riv...	49.19	-122.98	310873	0	C
7			62	Chemica...	Langley ...	20303 1...	49.19	-122.66	0	0	C
8			64	TransCa...	ANG Mo...	Moyle, B...	49.25	-115.85	66259	0	C
9			65	Catalyst ...	Port Albe...	4000 Sta...	49.25	-124.81	38111	0	C
10			66	Tembec	Elko Sa...	9600 Ca...	49.27	-115.1	16138	0	C
11			67	Central...	Central...	1 720 Be...	49.28	-123.11	88706	0	C

- Click on the “Manage” button.
- Click on the “Views” tab.
- Click the “New View” button and select a view type from the dropdown.

CRFM PORTAL Datasets Organizations Groups About Admin Search Datasets Search

Organizations / ESSA Technologies Ltd / Example dataset for the ... / Example CSV resource / Edit

Example CSV resource

Format CSV

All resources View resource

Edit resource DataStore Data Dictionary Views

New view Reorder resource view

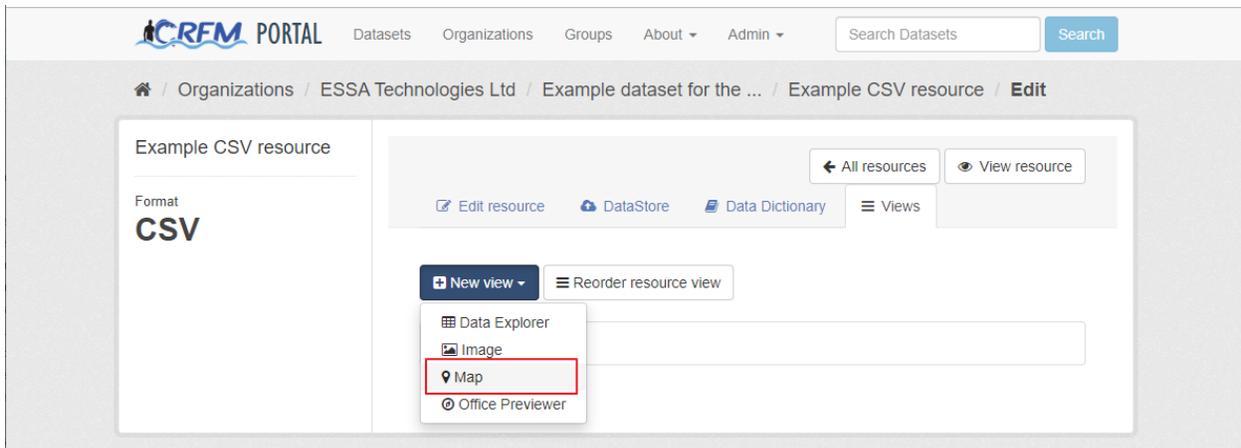
Data Explorer Image Map Office Previewer

The type of view which can be added will depend on the file format of the Resource.

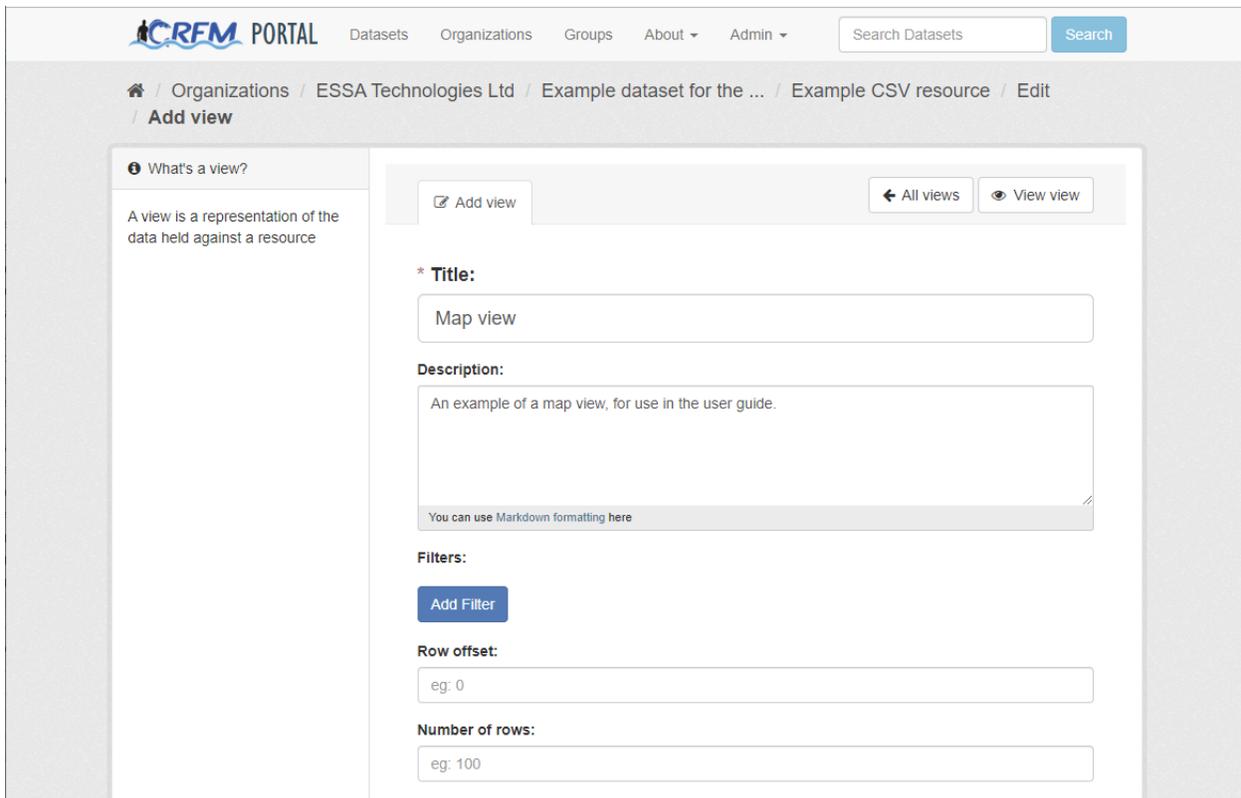
### Adding a map view

For a CSV file that contains columns with geographic coordinates in units of latitude and longitude decimal degrees, a map view can be added to the Resource.

- From the New view dropdown (see above), select “Map”.



- Enter a title for the view. This can be anything.



- In the “Field type” dropdown choose “Latitude/longitude fields”.
- In the “Latitude” dropdown choose the column containing the latitude coordinates.
- In the “Longitude” dropdown choose the column containing the longitude coordinates.
- Note that if “Latitude/longitude fields” has been selected in the “Field type” dropdown, the “GeoJSON field” dropdown will have no effect and can be ignored.
- Optionally check the “Cluster markers” and “Auto zoom to features” boxes.
- Click the “Add” button.

You can use Markdown formatting here

**Filters:**

[Add Filter](#)

**Row offset:**

eg: 0

**Number of rows:**

eg: 100

**Field type:**

Latitude / Longitude fields

**Latitude field:**

latitude

**Longitude field:**

longitude

**GeoJSON field:**

description

Auto zoom to features

Cluster markers

[Preview](#) [Add](#)

- Click the “View resource” button.
- Click the tab with the title you gave to your map view.

**CRFM PORTAL** Datasets Organizations Groups About Admin Search Datasets Search

Home / Organizations / ESSA Technologies Ltd / Example dataset for the ... / **Example CSV resource**

## Example CSV resource

[Manage](#) [Download](#) [Data API](#)

This is for creating screenshots for the user guide.

URL <http://portal.crfm.int/dataset/98b2cea1-4bb6-41b0-915a-482dafb15d55/resource/ef4dff7c-5367-46e6-bece-9f686ddc3f7e/download/faci...>

[Data Explorer](#) [Map view](#)

An example of a map view, for use in the user guide. [Embed](#)

[Add Filter](#)

The map view should now be visible.

Notes:

- If you choose “Cluster markers”, markers that are close to each other on the map will be combined into a single bubble. If the user zooms in sufficiently the bubble will break up into individual markers. You can choose this option if you feel it will make the map more legible.
- GEOJSON is a text format for storing GIS data like points, lines, and polygons. You are unlikely to come across spreadsheets containing GEOJSON columns. Latitude and longitude points are currently much more common.

### Adding other format views

Some other file formats for which Views will automatically be added, or which can be added, are:

- PDFs
- Office documents (Word files, Excel files, Powerpoint files)
- KML
- GeoJSON

The process for adding those views is similar to map views, above.

For Office documents, note that the preview is generated by a Microsoft Office web service. If the Dataset is “private” the service will not be able to access the file, and the preview will therefore fail to display.

Note:

- KML is a file format used to display geographic data in an Earth browser such as Google Earth. You can create KML files to, for example, pinpoint locations and add image overlays.

### *Adding a thumbnail to a Dataset*

Thumbnails are images that appear in the Datasets list, either in the main Dataset page or in the results of a search. If an image file is added to a Dataset as a resource, that image will automatically be used as the thumbnail for that Dataset. If more than one image is added, the first one added will be used.

Recognized image formats are .JPG and .PNG.

## **6. ADDING USERS TO ORGANIZATIONS**

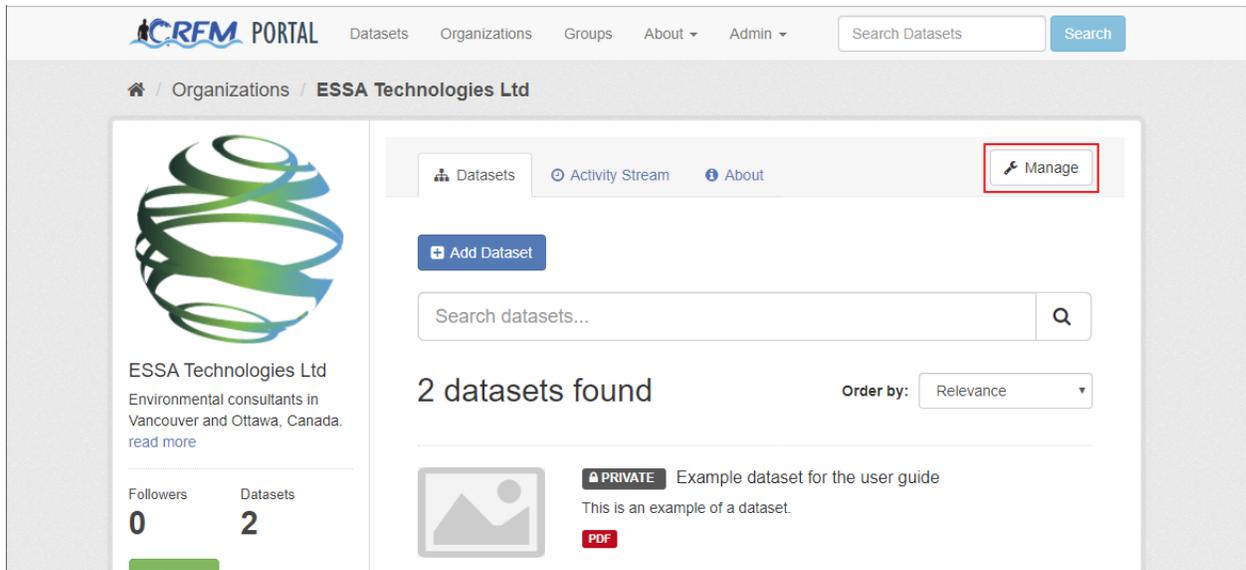
In order to add a user to an Organization you must be an administrator for that Organization, or the overall system administrator.

How you connect a user to an Organization depends on whether the user has already signed up for an account.

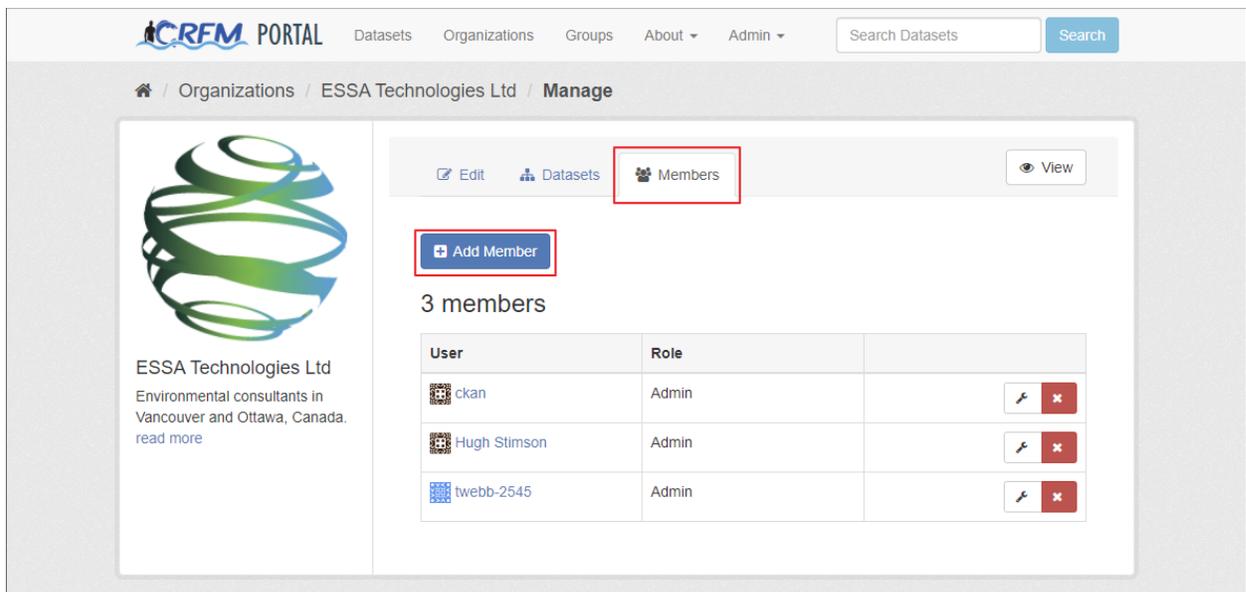
### *Adding existing users to an Organization*

To add an already-existing user account to an Organization:

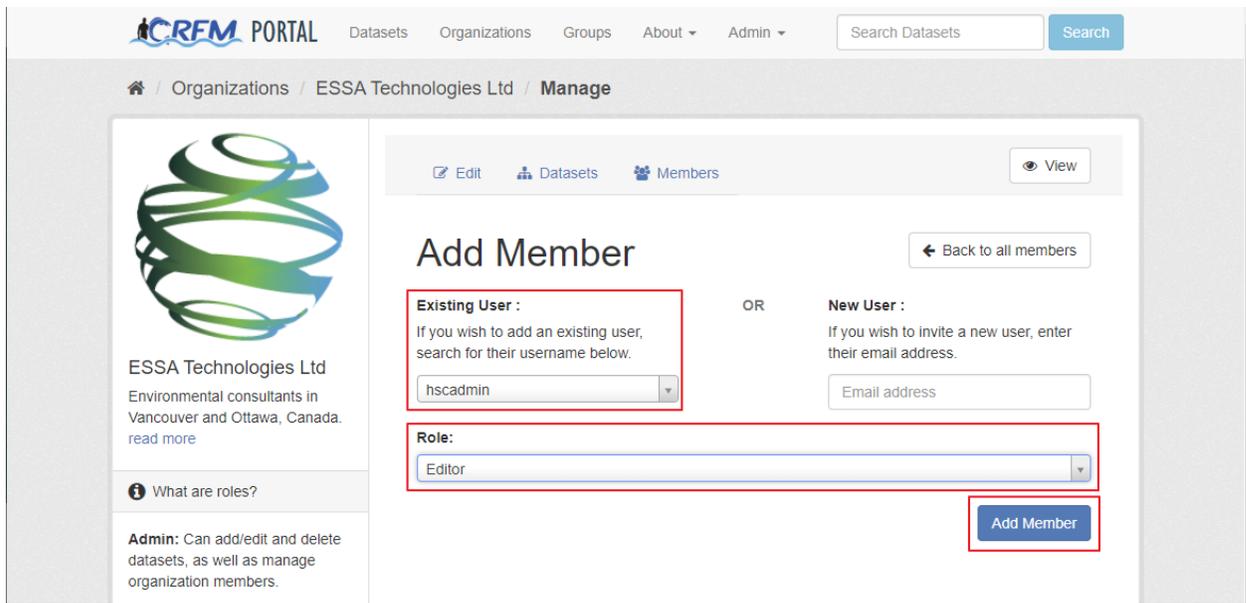
- Go to the Organizations page by clicking on the link in the top navigation bar: <http://portal.crfm.int/organization>
- Click on the Organization you wish to add a user to. You must be an administrator of this Organization (or a system administrator).
- Click on the “Manage” button near the top right.



- Click on the “Members” tab.
- Click the “Add Member” button.



- Click on the “Username” field and start typing. When the username of the person you want to add appears in the list below, click on it.
- Choose a Role for the user to have in this Organization, either Member, or Editor, or Administrator. See **Permissions in Using the portal** above for details. In most cases you will want users to be Editors, so that they can contribute data and documents to the portal on behalf of this Organization. If you choose “Member” they will be able to see Datasets that belong to the Organization but which have been marked private, but they will not be able to add new documents. If you choose “Administrator” they will be able to add new members to the Organization and edit the Organization’s details.

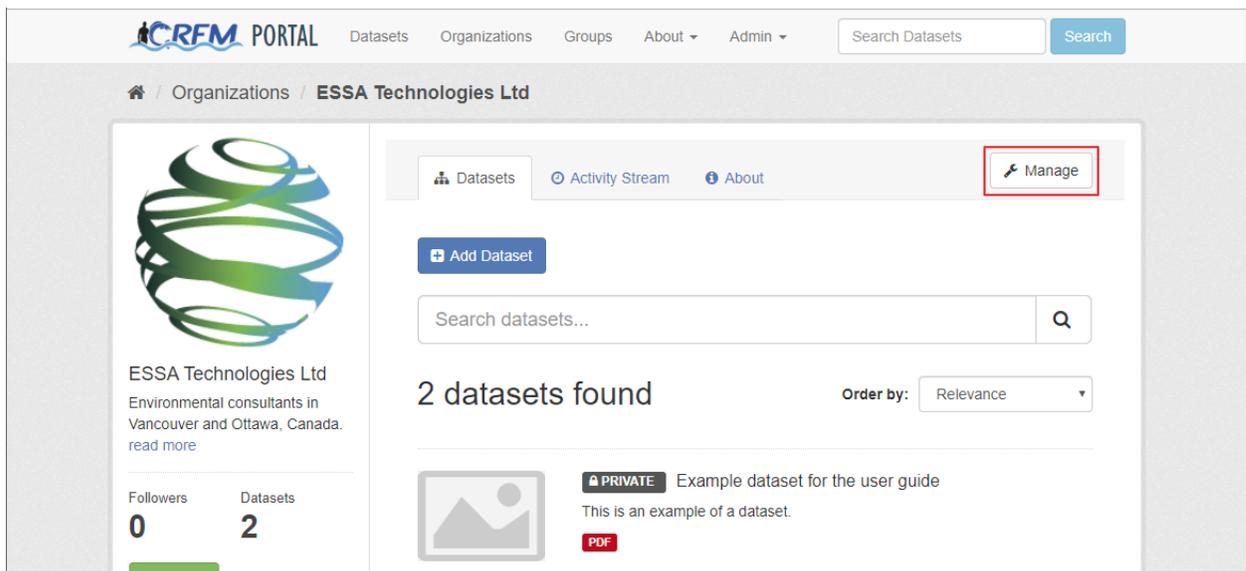


- Click the “Add Member” button to add the user.

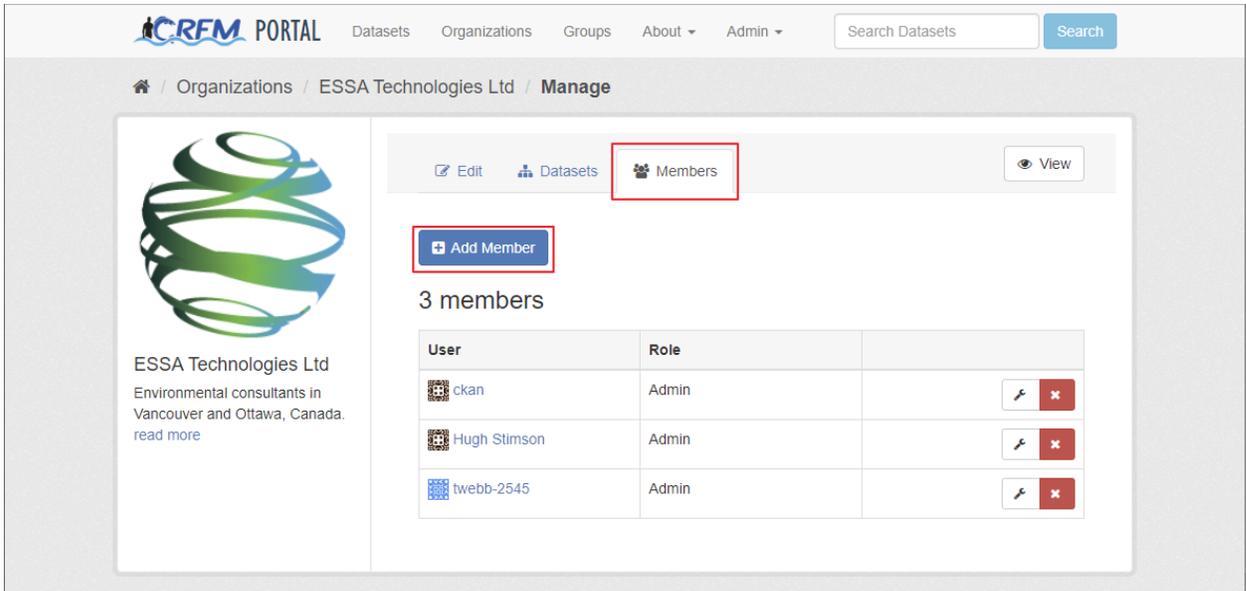
### *Adding new users to an organization*

If you want to invite a new user to the data portal and add them to an Organization in a single operation:

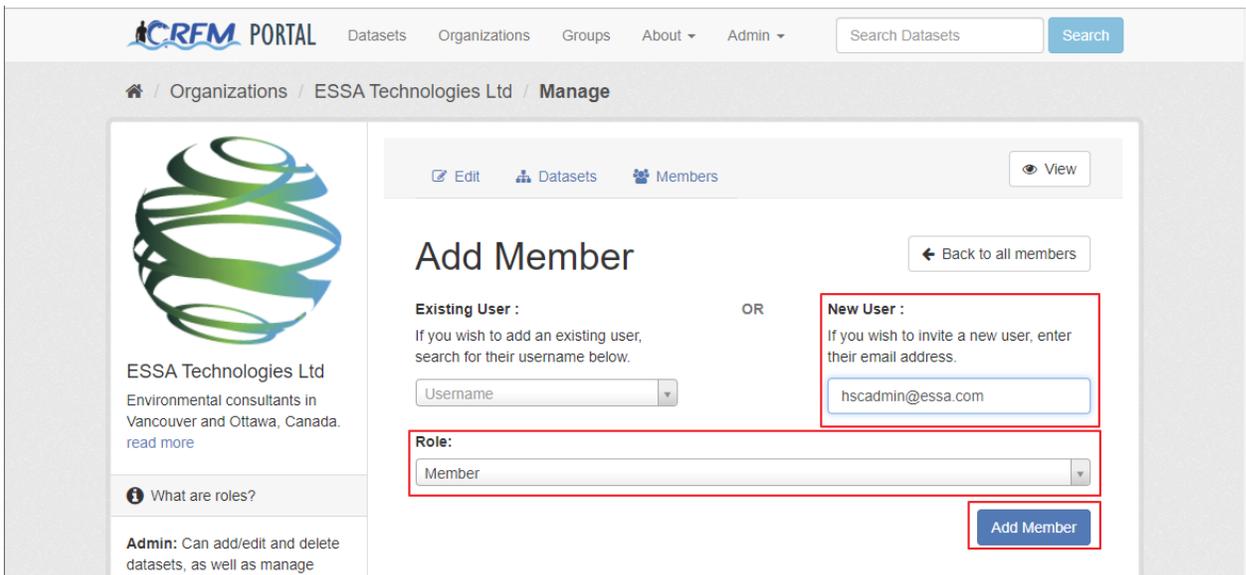
- Go to the [Organizations page](#) by clicking on the link in the top navigation bar.
- Click on the Organization you wish to add a user to. You must be an administrator of this Organization (or a system administrator).
- Click on the “Manage” button near the top right.



- Click on the “Members” tab.
- Click the “Add Member” button.



- Enter the user’s email address in the “New User: Email address” field.
- Choose a Role for the user to have in this Organization, either Member, or Editor, or Administrator. See **Permissions in Using the portal** above for details. In most cases you will want new users to be Editors, so that they can contribute data and documents to the portal. If you choose “Member” they will be able to see Datasets that belong to the Organization but which have been marked private, but they will not be able to add new documents. If you choose “Administrator” they will be able to add new members to the Organization and edit the Organization’s details.



- Click the “Add Member” button to add the user.

The user will receive an email inviting them to complete the sign up process for the data portal. The user will be assigned auto-generated username, which will be provided in the email and which they can change after they first sign in.

## C. Systems administration

This section of the guide is intended for staff who will have overall responsibility for the data portal.

### 1. MANAGEMENT TASKS

Management tasks undertaken within the portal require access to a special “systems administrator” CKAN account (see below).

Most portal management tasks are documented in the official documentation. Refer to those documents for more detail or for tasks which are not included in this guide:

<https://docs.ckan.org/en/2.8/sysadmin-guide.html>

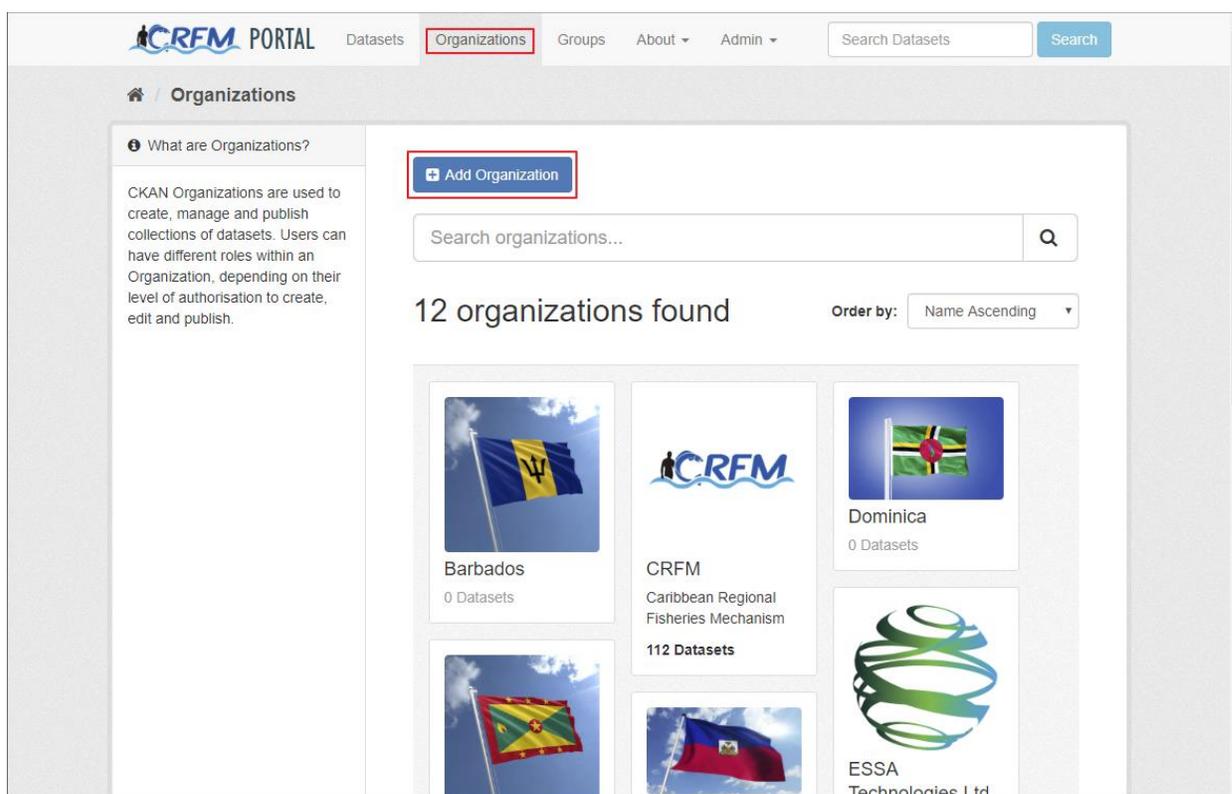
#### *Systems administration permissions*

Most user permissions in CKAN are set at the Organization level via the assignment of “member”, “editor” and “administrator” roles in given Organizations (see **Permissions** under **Using the portal** above). There is an additional level of permissions referred to as “system administrator” or just “sysadmin” which applies across the entire portal, and which is necessary for a few additional tasks.

#### *Adding new organizations*

To create a new Organization

- Go to the [Organizations page](#) by clicking on the link in the top navigation bar.
- Click the “Add Organization” button near the top (if you don’t see the button you may not be logged in with a sysadmin account).

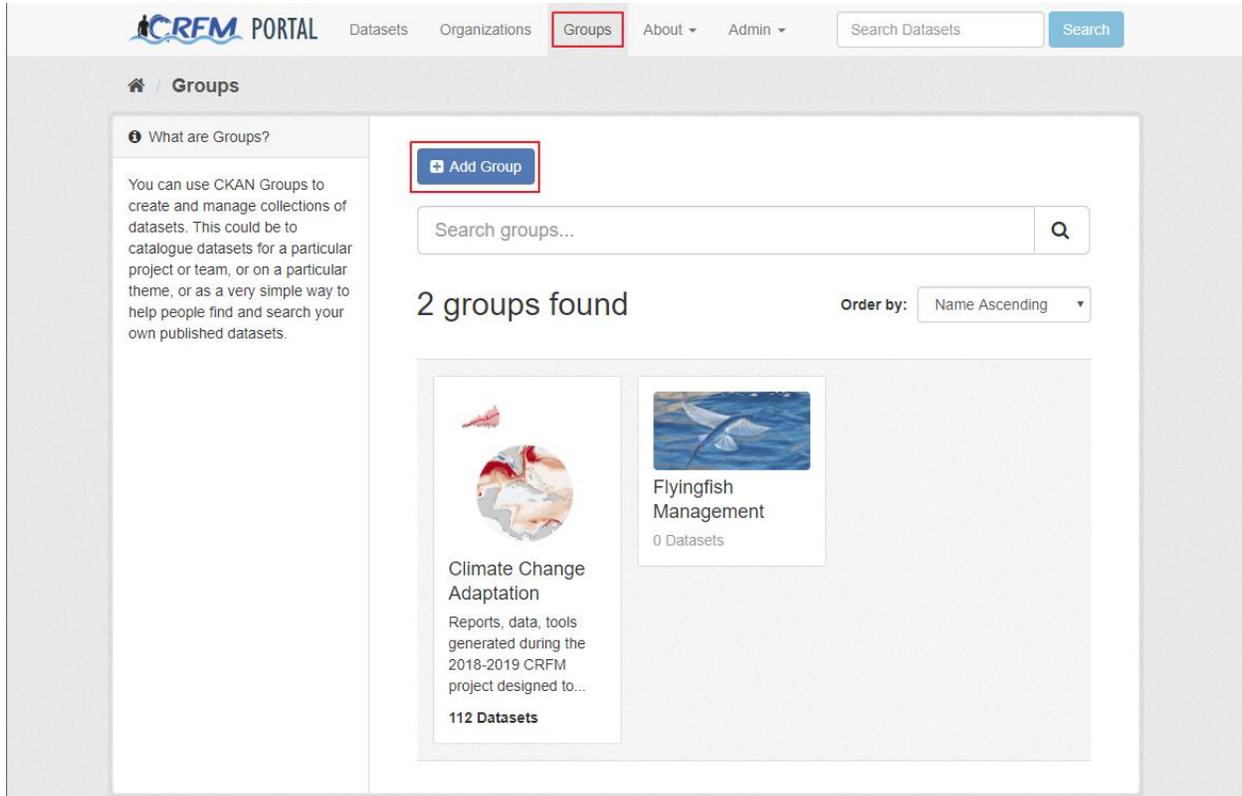


- Enter the Name, Description, and an image to represent the Organization, then click the “Create Organization” button.

## Adding Groups

To add a new Group that datasets can be assigned to:

- Click on Groups in the top navigation bar.
- Click the “Add Group” button.



- Enter the Name, Description, and an image to represent the Group, then click the “Create Group” button.

## Adding new system administrators

A user account cannot be assigned sysadmin permissions in the web interface. It must be assigned using the command line, within the host operating system. Alternatively, a new sysadmin account can be created on the command line.

See the official CKAN documentation for details on the necessary commands:

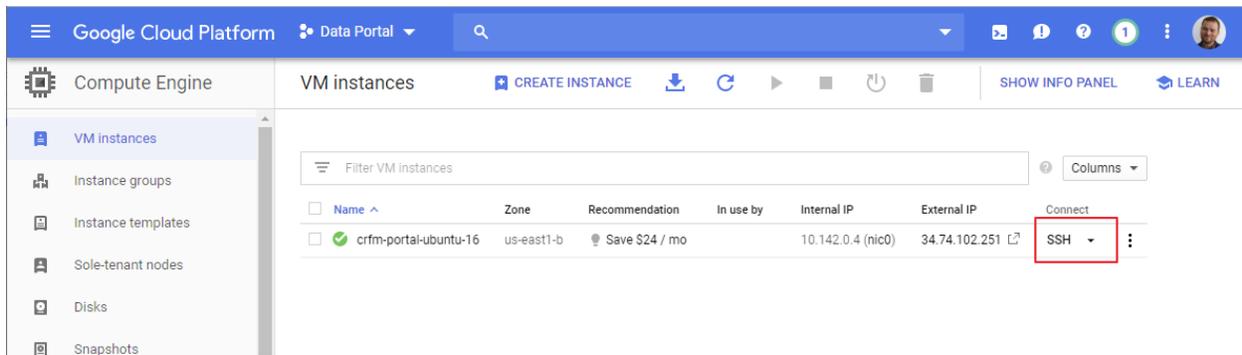
<https://docs.ckan.org/en/2.8/maintaining/getting-started.html#create-admin-user>

Note that you will have to login to the host operating system using a terminal shell to access the command line. One option is to use the web-based shell available in the Google Console.

The Google Console page from which the shell can be launched is (at the time of writing):

<https://console.cloud.google.com/compute/instances?project=data-portal-253216>

Click on “SSH” under “Connect” to launch the web-based shell.



As an example, to add user `ssinghrenton` type these commands into the command line interface, once the login step has completed:

```
. /usr/lib/ckan/default/bin/activate
cd /usr/lib/ckan/default/src/ckan
paster sysadmin add ssinghrenton -c /etc/ckan/default/production.ini
```

## 2. MAINTENACNE TASKS

These tasks require a Google account which has access to the Google Cloud project associated with the data portal. For more information see **Hosting details and contacts** below.

### *Restarting the virtual machine*

If the portal can't be loaded in a web browser due to "Server error" messages, or if it simply ceases to load entirely, it may be possible to restore access by restarting the virtual machine within which the site is hosted.

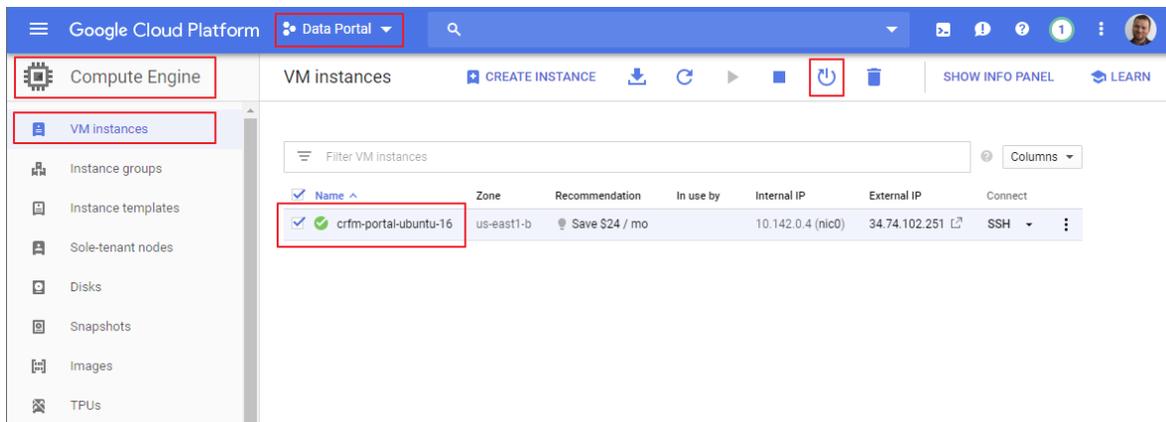
- Open the Google Cloud console: <https://console.cloud.google.com>
- From the Projects dropdown, select the "Data Portal" entry.
- Open the "Compute Engine" section
- Select the "VM instances" tab.

Or go directly to this link:

<https://console.cloud.google.com/compute/instances?project=data-portal-253216>

- Check the box next to the "crfm-portal-ubuntu-16" instance.
- Click the "Reset" link.
- If a warning box opens, click "Reset".

After a few minutes the virtual machine should be reset, and the site may become available again.



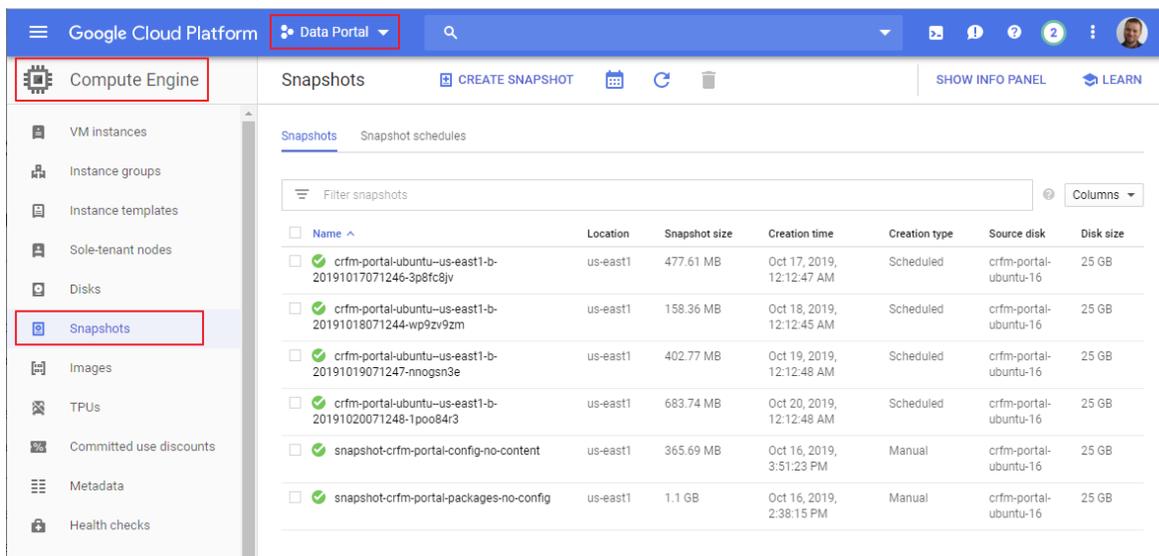
### Viewing backups

The virtual machine in which the site is hosted is scheduled to be backed up once a week on Sunday morning. Those automatic backups are retained for one year and then deleted.

To view existing backups:

- Open the Google Cloud console: <https://console.cloud.google.com>
- From the Projects dropdown, select the “Data Portal” entry.
- Open the “Compute Engine” section
- Select the “VM instances” tab.

Or go directly to this link: <https://console.cloud.google.com/compute/snapshots?project=data-portal-253216&tab=snapshots>



### Restoring backups

See the official Google Cloud documentation for how to restore the virtual machine from a backup: <https://cloud.google.com/compute/docs/instances/create-start-instance#create-snapshot>

## 3. CKAN

The data portal is built on top of the CKAN open source data portal framework. The official documentation can be found here:

<https://ckan.org/documentation-and-api/>

### Versions

The portal uses CKAN version 2.8, written with Python v2.7.

### Theme

The customization of the portal is implemented in the **climatesmart\_theme** extension, written by ESSA Technologies Ltd. At time of writing that extension is hosted at:

[https://bitbucket.org/essatechnologies/ckanext-climatesmart\\_theme](https://bitbucket.org/essatechnologies/ckanext-climatesmart_theme)

See **Hosting details and contacts** below for access to the theme code repository.

That extension contains a custom metadata schema for use with the **scheming** plugin. It is found at: `ckanext-climatesmart_theme/ckanext/climatesmart_theme/scheming/dataset_climatesmart.json`

A version of the metadata schema to expose the metadata fields to search queries is also included, to be used with the Solr search functionality that comes bundled with CKAN. That version of the scheme is at `ckanext-climatesmart_theme/ckanext/config/solr/schema-2.8.xml`

### Other extensions

The **climatesmart\_theme** extension is intended to be installed along with these additional extensions:

datasetthumbnail	<a href="https://github.com/apivate/ckanext-datasetthumbnail">https://github.com/apivate/ckanext-datasetthumbnail</a>
scheming	<a href="https://github.com/ckan/ckanext-scheming">https://github.com/ckan/ckanext-scheming</a>
pages	<a href="https://github.com/ckan/ckanext-pages">https://github.com/ckan/ckanext-pages</a>
pdfview	<a href="https://github.com/ckan/ckanext-pdfview">https://github.com/ckan/ckanext-pdfview</a>
geoview	<a href="https://github.com/ckan/ckanext-geoview">https://github.com/ckan/ckanext-geoview</a>
flask_debugtoolbar	<a href="https://flask-debugtoolbar.readthedocs.io/en/latest/">https://flask-debugtoolbar.readthedocs.io/en/latest/</a>
officedocs	<a href="https://github.com/jqnatividad/ckanext-officedocs">https://github.com/jqnatividad/ckanext-officedocs</a>

## 4. HOSTING DETAILS AND CONTACTS

The CRFM data portal CKAN instance runs on an Ubuntu 16.04 virtual machine hosted in Google Compute Engine in [Google Cloud](#), within a project created by CRFM.

For further hosting and account details contact:

#### **Hugh Stimson**

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The CRFM is an inter-governmental organization whose mission is to “Promote and facilitate the responsible utilization of the region’s fisheries and other aquatic resources for the economic and social benefits of the current and future population of the region”. The CRFM consists of three bodies – the Ministerial Council, the Caribbean Fisheries Forum and the CRFM Secretariat.

CRFM members are Anguilla, Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, St. Kitts and Nevis, St. Lucia, St. Vincent and the Grenadines, Suriname, Trinidad and Tobago and the Turks and Caicos Islands.

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[www.crfm.int](http://www.crfm.int)

[www.youtube.com/TheCRFM](http://www.youtube.com/TheCRFM)

[www.facebook.com/CarFisheries](http://www.facebook.com/CarFisheries)

[www.twitter.com/CaribFisheries](http://www.twitter.com/CaribFisheries)



**Caribbean Regional Fisheries Mechanism**



[www.crfm.int](http://www.crfm.int)