



The CDM Dataportal Configuration manual

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[These are notes taken during the configuration of portals – more complete albeit more technical instructions can be found in the Drupal site itself]

1 Working with Drupal

1.1 Introduction

An brief overview of menu functions is given in the “Drupal for dummies cheat sheet”:
<http://www.dummies.com/web-design-development/site-development/drupal-for-dummies-cheat-sheet/>.

If you don’t find a Login on the home page, use use [siteURL]/user/login to enable editing and administration. .

1.2 Managing pages

1.2.1 Creating a new page

.... How To

du grundsätzlich einen **URL Alias angeben**. Dieser ist dann ein Alias für node/{node_id} in der URL. Das optimiert die Site nicht nur für Suchmaschinen:

z.B: <http://portal.cybertaxonomy.org/salvador/node/3/edit#edit-actions>



Menu settings

Inicio

Revision information

No revision

URL path settings

No alias

Comment settings

URL alias

Optionally specify an alternative URL by which this content can be accessed. For example, type "about" when writing an about page. Use a relative path and don't add a trailing slash or the URL alias won't work.

1.2.2 Including a banner

den Banner kann man hier http://portal.cybertaxonomy.org/salvador/admin/appearance/settings/zen_dataportal#edit-zen-dataportal-banner hochladen. Banner und das EDIT-Logo sind zwei getrennte Bilder und können unabhängig von einander konfiguriert werden. [Image size mit Logo: 852x93 pixel]

1.2.2.1 Banner ersetzen:

BANNER IMAGE SETTINGS

If toggled on, the following image will be displayed.

Use the defaultbanner

Check here if you want the theme to use the image supplied with it.

BANNER IMAGE SETTINGS

If toggled on, the following image will be displayed.

Use the defaultbanner

Check here if you want the theme to use the image supplied with it.

Preview



Path to custom banner

NoTextDuble.jpg

The path to the file you would like to use as your banner

Upload banner image

No file selected.

If you don't have direct file access to the server, use this field to upload your image.



1.2.2.2 Logo abschalten:

TOGGLE DISPLAY

Enable or disable the display of certain page elements.

- Logo
- Site name
- Site slogan
- User pictures in posts
- User pictures in comments
- Shortcut icon
- Main menu
- Secondary menu

1.2.3 Site Name ändern:

<http://test.e-taxonomy.eu/dataportal/preview/test1/admin/config/system/site-information> --> Site name

Und den Font des Texts? Das geht bisher nur über die "User defined styles" auf der "[CDM DataPortal base theme](#)"_Seite:

1.2.4 Menus

secondary menu:

1. Hier <http://portal.cybertaxonomy.org/salvador/admin/structure/menu> Add menu
2. Ein Menu ist immer als Block verfügbar und kann als solcher beliebig auf im Layout plaziert werden. Für die Alphabetleiste und Untertitelstruktur eignet sich entweder der Content- oder Highlight-Bereich .
3. Diese Menus sollen nur auf bestimmten Seiten erscheinen. Um dies möglichst einfach konfigurieren zukönnen ist es von Vorteil, wenn du für die entsprechenden Seiten hierarchische Pfad-Aliase Verwendest. Also zum Beispiel:

bibliography/a, bibliography/b, bibliography/c, ... und background/chapter1, background/chapter2 uns so weiter. In der Block Konfiguration kannst du dann die Anzeige auf Seiten einschränken die dem Pattern bibliography/* und background/* entsprechen

1.2.5 Setting the homepage for the Data Portal

Das ist der Eintrag 'Default front page' :

<http://portal.cybertaxonomy.org/salvador/admin/config/system/site-information#edit-site-frontpage>

Dort trägst du den Alias oder node/{node_id} der gewünschten Seite ein.

Configure the Classification-Block so that the Data Portal (Search, Taxon tree, etc.) is shown only on the respective pages. Access the configuration with the following path (replace "salvador" with your portal path).



http://portal.cybertaxonomy.org/salvador/admin/structure/block/manage/cdm_taxontree/cdm_tree/configur#edit-actions

The example uses the URL Alias "listado" for the data portal home page to be set.

Visibility settings

Pages
Restricted to certain pages

Content types
Not restricted

Roles
Not restricted

Users
Not customizable

Show block on specific pages

All pages except those listed

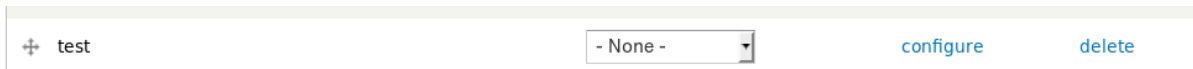
Only the listed pages

listado
cdm_dataportal/*

Specify pages by using their paths. Enter one path per line. The '*' character is a wildcard. Example paths are *blog* for the blog page and *blog/** for every personal blog. *<front>* is the front page.

1.3 Wie lösche ich einen Block?

Nicht mehr anzeigen: In der Liste der Blocks ein die Region '- none -' für den entsprechenden Block auswählen und ganz unten auf "Save" klicken. <http://test.e-taxonomy.eu/dataportal/preview/test1/admin/structure/block>
 Löschen: Eigentlich sollte eine 'delete' option in der Blockliste angezeigt werden, so wie in diesem Beispiel zu sehen:



Außer, der Block ist ein Menü-Block! Dieser verschwindet in dem man das Menü löscht:

<http://test.e-taxonomy.eu/dataportal/preview/test1/admin/structure/menu/manage/menu-caryophyllales-2015/edit>

1.4 Bibliographic information

leere Bibliographien sollten natürlich ausgeblendet werden. Ich habe dafür gleich mal ein Ticke angelegt.

Bei dieser Gelegenheit schicke ich dir gleich die Information zum Einschalten des Bibliographie Blocks:

1. go to: http://caryophyllales.org/nepenthaceae/admin/config/cdm_dataportal/settings/layout
2. Check the option: **Original Source in bibliography**



SOURCE CITATIONS

Original Source in bibliography

Show original source citations in bibliography block, instead of rendering them with other annotations in each feature block.

The format of the key numerals

Alphabet (upper case) ▾

3. Whether the Original Source reference of a Feature Block is actually put into the bibliography also depends on the settings in the "Taxon profile feature block settings"

(http://caryophyllales.org/nepenthaceae/admin/config/cdm_dataportal/settings/layout/taxon)

For more information please refer to the description on the settings "Sources as content" & "Sources as content to bibliography"

1.5 Images

1.5.1 Wie lösche ich denn hochgeladene Images wieder vom Server?

In deiner User-Seite gibt es ein Tab "Filebrowser":

<http://test.e-taxonomy.eu/dataportal/preview/test1/user>

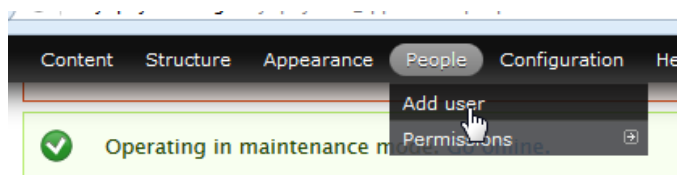
File auswählen und im Toobar auf "Delete" klicken, Der Upload über dieses Tool geht nur in den Ordner 'pictures'.

1.6 Portal administration

1.6.1 Register new users

A data portal may have restricted access, i.e. a user must log in with username and password. To register a new user, you have to have the Drupal-roles "administrator", "CDM admin" or "user admin" assigned to you.

In the Drupal menu go to *People – Add user* and enter the user's name, email address and a preliminary password (twice).



For a normal user, make sure that under *Roles* only the (default) option *authenticated user* is checked; that user will have read-access only. You can also check the *Notify user of new account* option so the the new user receives an email notification.

Roles

- authenticated user
- administrator
- CDM admin
- user admin
- Notify user of new account

Create new account

Finally, click *Create new account*.



1.6.2 Drupal Menu in Portal

> 4. Wenn ein User keine Admin Rechte hat, dann erscheinen auch die Tabs (Edit etc.) und das Drupal Menü nicht?

Das Drupal Menü und die Editier-Tabs erscheinen nur für Nutzer mit den Rollen Admin oder Edit Admin: siehe:

<http://test.e-taxonomy.eu/dataportal/preview/test1/admin/people/permissions>

PERMISSION	ANONYMOUS USER	AUTHENTICATED USER	ADMINISTRATOR	CDM ADMIN	USER ADMIN
Administration menu					
Access administration menu Display the administration menu at the top of each page.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Flush caches Access links to flush caches in the administration menu.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Display Drupal links Provide Drupal.org links in the administration menu.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

und die Setting in der Rubrik "**Node**":

1.6.3 Wie richte ich einen read-only User ein?

Über Drupal Menü: People -> Add User einen neuen User anlegen und ihm die nur die Rolle 'authenticated user' geben, das ist auch der Standart.

Roles

- authenticated user
- administrator
- CDM admin
- user admin

Das heißt also dass jeder der sich einloggen kann auch ein read-only user ist.



2 CDM-specific functionality

2.1 Overall layout of the Data Portal – tableless taxon pages

More and more portals are configured with tableless taxon pages. A specific setup is required for this to look pleasant. The following configuration adjustments are necessary to achieve this:

- http://portal.cybertaxonomy.org/roteliste_plantae/admin/appearance/settings/zen_dataportal exclude per css the "Synonymy" labels in the TOC and from the Feature block:

```
#synonymy h2 {  
display:none;  
}  
  
.page-part-toc-item-synonymy {  
display:none;  
}
```

Alternatively, to completely eliminate the TOC:

```
#synonymy h2 {  
display:none;  
}  
  
#page-toc {  
display:none;  
}
```

- http://portal.cybertaxonomy.org/roteliste_plantae/admin/config/cdm_dataportal/settings/layout/taxon
 1. **Tabbed taxon page deaktivieren**
 2. **Unter Tabs: Synonymy tab nach oben**
 3. **Unter Synonymy: anzeige des akzeptierten** taxons deaktivieren

2.2 Sequence of sections with factual data

Die entsprechenden Einstellungen sind hier zu finden:

http://caryophyllales.org/caryophyllales_spp/admin/config/cdm_dataportal/settings/layout/taxon#edit-cdm-taxonpage-tab-weight



• **TABS ORDER**
The weight value defines the order of the tabs or of the respective content block on the taxon page when it is the tabless mode.

General
-3

Synonymy
-2

Images
0

Specimens
1

Keys
3

Experts
-4

Synonymy hat einen Wert der größer dem des General Tabs ist. Damit die Synonymie vor General angezeigt wird muss der Wert kleiner sein. Bei den Nepenthes ist dies korrekt eingestellt.

2.3 Features (blocks of “factual data” content in the General Tab)

2.3.1 Defining an independent feature tree for the Portal

If you want to have different features displayed in the Portal from those that can be edited in the TaxEditor, you have to create a separate feature tree in the Editor. This can then be selected using http://portal.cybertaxonomy.org/salvador/admin/config/cdm_dataportal/settings/layout/taxon under Taxon profile (tab) > Feature Blocks > Taxon profile feature tree:.

2.3.2 Feature does not show in Portal

You have to have the feature enabled in the *Feature Tree* in the TaxEditor to have them show-up under *Content* in the Portal. Go to Admin-Server-sided preferences-Factual Data-Features and mark the features to be displayed. Note that this setting is stored in the database, not locally.

2.3.3 Sequence of features

The sequence of features in the Portal is determined by their sequence in the *Feature Tree*. You can drag and drop individual features to their desired position in the TaxEditor.



2.3.4 Concatenation of factual data

▼ **MUESTRAS DE HERBARIO (TEXTO)**

List type

not as list ▼

Sources as content

Put sources also as content to bibliography

Sort elements

No sorting ▼

NOT YET FULLY USED! only in preparation (works partially for d

No sorting
Sorting undefined

Ascending
Alphabetically in ascending order

Descending
Alphabetically in descending order

Hierarchical
Use the order of items and their hierarchy. This is not possib

Element tag

span ▼

Element glue

:

2.4 Specific feature settings

2.4.1 Language for common names

This can be configured via the theme settings in the css. Under the following URL theme settings can be overwritten:

http://portal.cybertaxonomy.org/salvador/admin/appearance/settings/zen_dataportal#edit-user-defined-styles

In this case, the statement is the following:

```
#block-cdm-dataportal-feature-common-name .language-label{
display:none;
}
```



2.4.2 Application area for common names

Configuration not yet implemented.

2.5 Classification and name output

2.5.1 Classification breadcrumbs

The settings are located under block “Highlighted” – “CDM Classification breadcrumbs”, accessible by the URL <http://portal.cybertaxonomy.org/salvador/admin/structure/block> (replace “salvador” with your database in the URL).

To deactivate, choose “Region” = “none”.

To activate, chose region ***

2.5.2 Enable or disable the full output of the accepted taxon under the page title.

http://portal.cybertaxonomy.org/salvador/admin/config/cdm_dataportal/settings/layout/taxon#edit-taxon-synonymy (replace “salvador” with the name of your database).

▼ TAXON SYNONYMY (TAB)

This section covers the settings related to the taxon **synonymy** tab.

Show accepted taxon on top of the synonymy

This also affects untabbed output, which integrates the content of the synonymy tab in the taxon page.

2.5.3 Showing or hiding alternative classifications

The portal can be limited to specific classifications.

Under [http://portal.cybertaxonomy.org/\[your portal\]/admin/config/cdm_dataportal/settings](http://portal.cybertaxonomy.org/[your portal]/admin/config/cdm_dataportal/settings) check the desired classifications. The taxa in the unchecked alternative classification can still be reached in case of existing taxon relations from the accepted classification to the alternative classification (e.g. concept synonymy).

The taxa in the unchecked alternative classifications will currently also not show up via the taxon search in the portal.

Included Classifications:

- Rubiaceae Conabio
- Rubiaceae Borhidi (2012)

Only the checked classifications will be available in the classification chooser.

2.6 Search settings

1)

man kann zum Einen die Klassifikationen die in der Advanced-Search zur Verfügung stehen einschränken:
http://caryophyllales.org/nepenthaceae/admin/config/cdm_dataportal/settings#edit-taxontree-includes



.. und die Suche kann auf die aktuell ausgewählte eingeschränkt werden

http://caryophyllales.org/nepenthaceae/admin/config/cdm_dataportal/settings/layout/search#edit-simple-search-ignore-classification --> "Ignore the chosen classification in simple search"

2.7 Add external links

Und hier die Anleitung für das Aktivieren der External Links:

1. <http://caryophyllales.org/nepenthaceae/admin/modules> : External Links modul aktivieren falls es nicht schon aktiv ist.

Wohl die "Contextual links" ? Or Shortcut?

2. <http://caryophyllales.org/nepenthaceae/admin/structure/block> : Den External Links Block in der gewünschten Region (First-Sidebar) positionieren

Visibility settings

<p>Pages Restricted to certain pages</p>	<p>Show block on specific pages</p> <p><input type="radio"/> All pages except those listed</p> <p><input checked="" type="radio"/> Only the listed pages</p>
<p>Content types Not restricted</p>	<p>cdm_dataportal/*</p>
<p>Roles Not restricted</p>	
<p>Users Not customizable</p>	

2.8 Maps

2.8.1 Define the map maximal area by bounding box:

Menu option: Configuration - CDM Dataportal - Geo & Map - Layout

Draw the box on the map or zoom in until the map is displayed as wanted

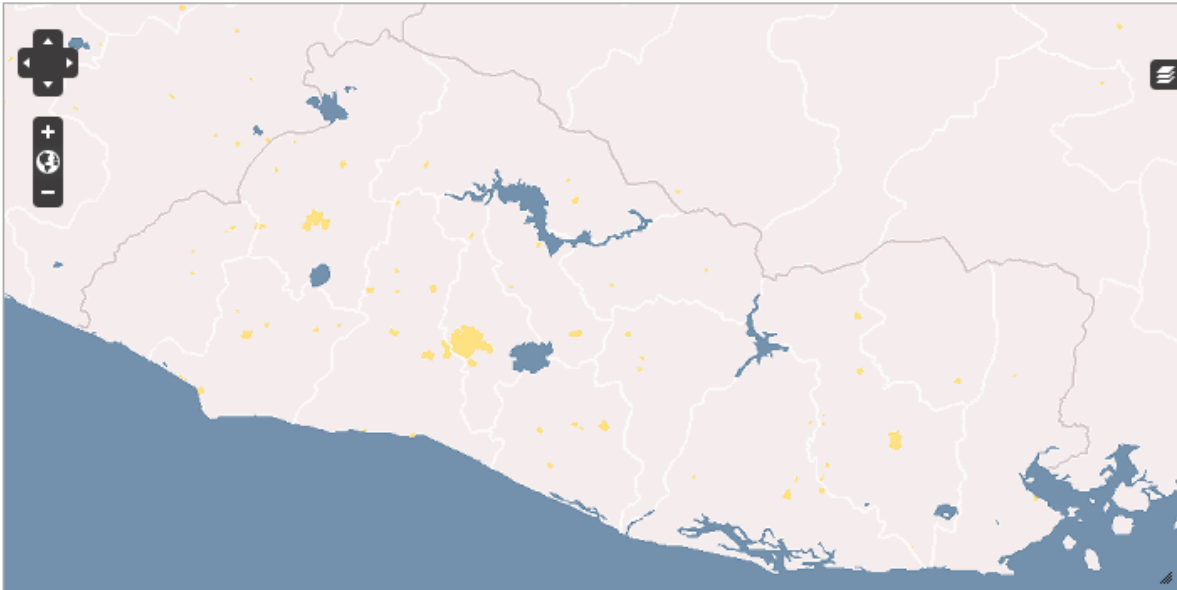


MAP PREVIEW

The preview of the map.

Hold down Strg and drag with your mouse to select a bbox to zoom to.

The bbox of the visible area of the map is always displayed below the map.



Copy the green coordinates (“degree:”)

```
map extent bbox:
-90.300926,13.109263,-87.50405,-87.50405,14.507701, degree: -90.300926,13.109263,-87.50405,14.507701
```

Open *MAP SETTINGS*

Paste the coordinates into the *bounding box* field

Bounding box

The bounding box (left, bottom, right, top) in degree defines the area to be initially displayed in map, enclosing the shown data.

TIP: You can use the map preview above to choose the **map extent bbox** in **degree** from the map. Hold down Strg and drag with your mouse to select a bbox to zoom to. The bbox of the visible area of the map is always displayed below the map.

2.9 Images

2.9.1 Image Gallery settings

Die Bilder die den Specimens zugeordnet sind können wahlweise mit in der Gallery angezeigt werden. Dazu muss der entsprechende Haken gesetzt sein:



Menu: Configuration – CDM Dataportal – Settings [General]

AGGREGATION OF DATA

This section covers the different aspects of aggregating information.

Taxon media filter

- Media in taxon descriptions
- Media in name descriptions
- Media related to specimens and occurrences

This filter configures which images should be taken into account.

2.9.1.1 *Caption*

Die Caption des Bildes ist immer der Title wie er als Media.title eingegebene ist.

Columns

http://portal.cybertaxonomy.org/salvador/admin/config/cdm_dataportal/settings/layout/taxon ->

Media Gallery

Und wie ist es, wenn man image-server images und einfache Images mischen will?

Das ist kein Problem, sofern der "Default image viewer" und nicht der "FSI Viewer" verwendet wird. Das ist im übrigen auch die Voraussetzung dafür, dass alles anderen Features, die wir hier besprochen haben funktionieren.

2.9.1.2 *Wie schalte ich die „Media Representations“ ab?*

Dafür gibt es noch keinen Knopf, aber man kann diesen Teil per css ausblenden:

```
/* hide media-representations */
#media-representations {
display: none;
}
.cdm_media_viewer_image .media-caption h3 {
display: none;
}
```

2.10 Content

2.10.1 Remove automatically created species-pages

http://test.e-taxonomy.eu/dataportal/preview/test1/admin/config/cdm_dataportal/settings



Under [yoursite]/admin/config/cdm/cdm_dataportal/settings you can configure, if data pages are created and you can remove existing ones:

DRUPAL INTEGRATION

- Create drupal nodes

Content für cdm_dataportal pages is directly retrieved from the CDM webservice configured above nodes are created and stored in the database.

WARNING:

Using this button, you will lose all content associated with the cdm drupal nodes which is stored i

Drop all cdm nodes

All Drupal nodes created for cdm content can be deleted at once using this button.