European Climate Adaptation Platform (Climate-ADAPT) training manual

1) Introduction

This manual describes the workflow of the maintenance process for the content of CLIMATE-ADAPT. It can be separated into two parts: Managing web content and managing CLIMATE-ADAPT database items.

Web content concerns the mostly textual page content as available in the various sections of CLIMATE-ADAPT. It is maintained through the Content Management System (CMS) Liferay and follows a specific workflow defined in the CMS. Chapter 2 shortly describes this process and provides some exercises that help new users to understand and work with the workflow for content management.

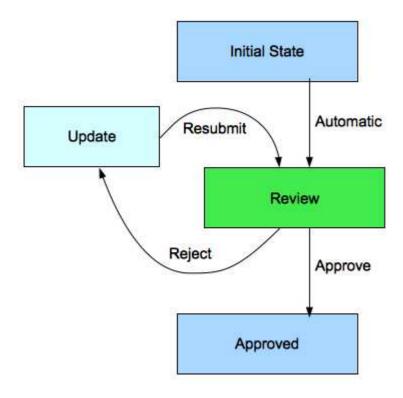
The CLIMATE-ADAPT database contains information on climate adaptation related knowledge sources. To be more precise, the database items are not the knowledge source, but describe the source and thus contain metadata describing an information source and a reference to that source. For these database items a specific maintenance process was designed. Chapter 3 explains and describes the types of database items that exist in the database. It also describes the maintenance workflow for these items and provides a set of exercises to help new users understand and work with the maintenance of database items and the associated workflow.

2) Maintenance of CLIMATE-ADAPT web content

Generally, web content to be maintained concerns the mostly textual page content as available in the various sections of CLIMATE-ADAPT (e.g. web page textual content, news, events etc.). The web content of CLIMATE-ADAPT is stored in the Content Management System (CMS) Liferay. In this CMS, the content can be added and modified using specific workflows that are elaborated by users that have been appointed specific maintenance roles.

Maintenance Workflow

Workflow of content management is implemented via the 1-step approval mechanism. Web content items are created and/or edited and are subsequently submitted for review before they are published for CLIMATE-ADAPT visitors. Reviewers can approve or reject and comment submitted content, and in the case of rejection, the editor can update and resubmit the content item for review.



The following roles are relevant for this workflow:

Role: Writer

Writers (e.g. EEA, ETCs) can edit existing web content and submit it for publication.

Role: Content Reviewer

Content Reviewers (EEA) review and reject (or ask for further changes) or publish submitted web content.

Content Reviewers at the EEA will receive automatic notifications on their individual email address when new/updated material (for both web content and database items) is submitted by 'Writers', 'Users' and 'Power Users'.

- Writers can update web content (steps: initial state, update) and submit for publication (transitions: initial state → review, update → review)
- Content reviewers get a mail if content is submitted for review and have access to the submission queue (steps: review)
- **Content reviewers** can assign for quality control a submitted change in the submission queue (step: review)
- **Content reviewers** can comment and/or edit submitted changes (step: review)
- **Content reviewers** can reject submitted changes (transition: review → update)
- Content reviewers can approve (and in that way publish) submitted changes (transition: review → approved)
- Writers can view the submission progress

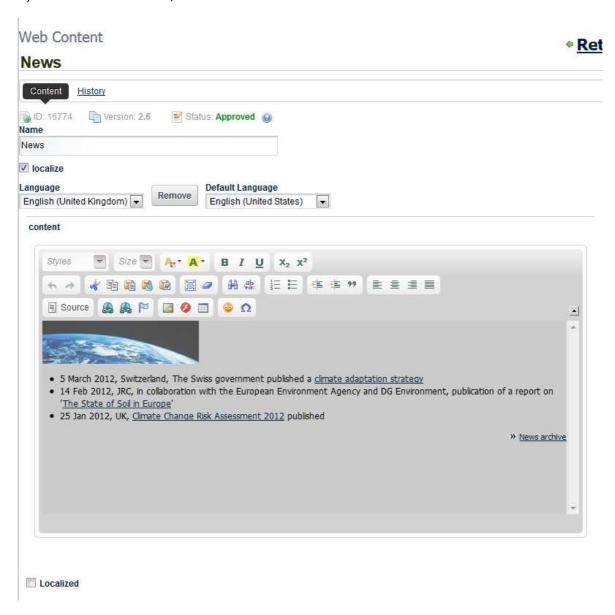
The following section provides a set of exercises to practice the full workflow of CLIMATE-ADAPT content maintenance

Exercise 1 – Editing web content (role: writer)

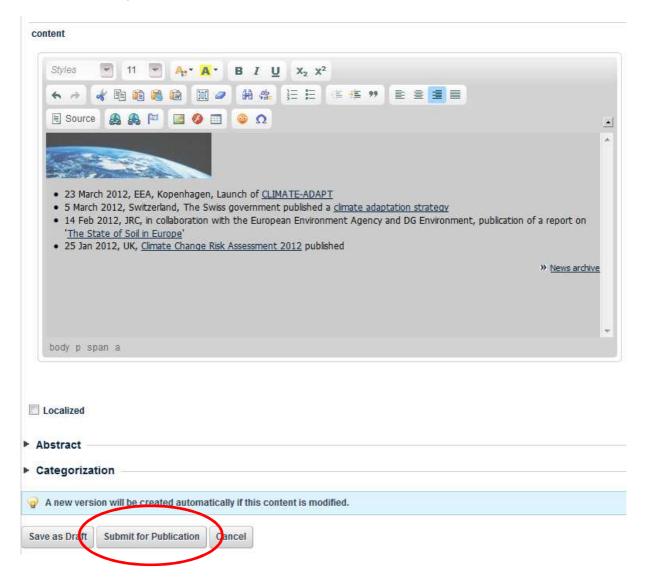
- 1) Login to CLIMATE-ADAPT as a user with the writer role
- 2) On the home page, click the edit button for the news section



3) In the content field, add a new news item to the list



4) To publish the change for review by the CLIMATE-ADAPT content reviewers, click "Submit for publication"



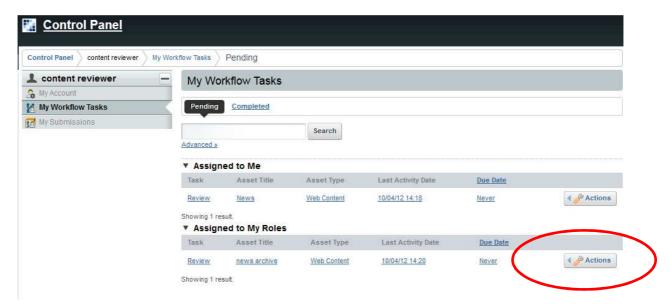
The request for change will now be published to the content editors, who can decide to approve, comment or reject the proposed change.

Exercise 2 – Reviewing and rejecting a proposed change (role: content reviewer)

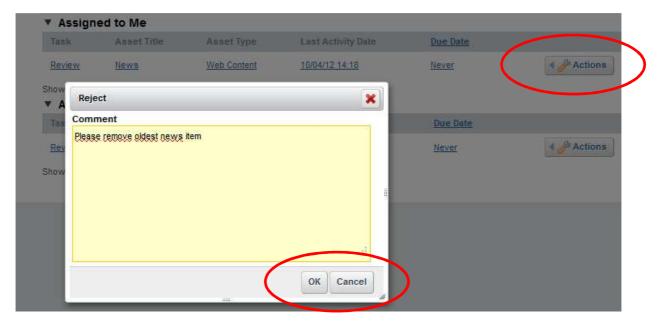
- 1) Login to CLIMATE-ADAPT as a user with the role content reviewer
- 2) Open the control panel to review submissions



3) Go to "my workflow tasks", take a look at the list of content proposed for review and use the menu under "Actions" to assign the news proposal to yourself (or another content reviewer if required)



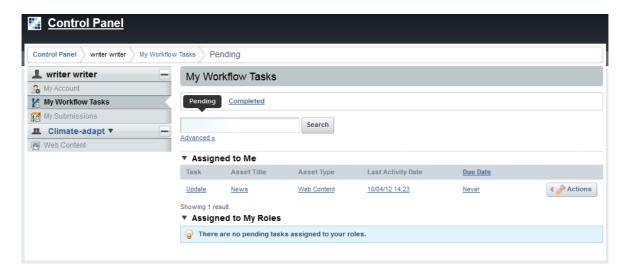
4) In this case, reject the proposed content, since the oldest news item was not removed from the list in the proposed content item.



The content proposal is now rejected and will re-appear in the workflow task list of the writer that proposed the changes.

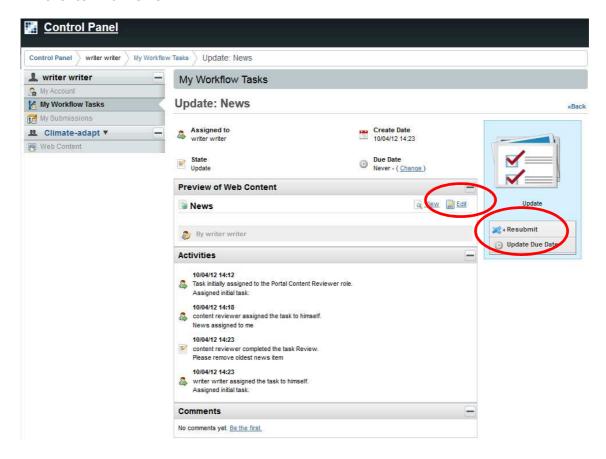
Exercise 3 – Change and re-submit a rejected content item (writer)

- 1) Login to CLIMATE-ADAPT as a user with the content editor role
- 2) Open the control panel to review your list of workflow tasks



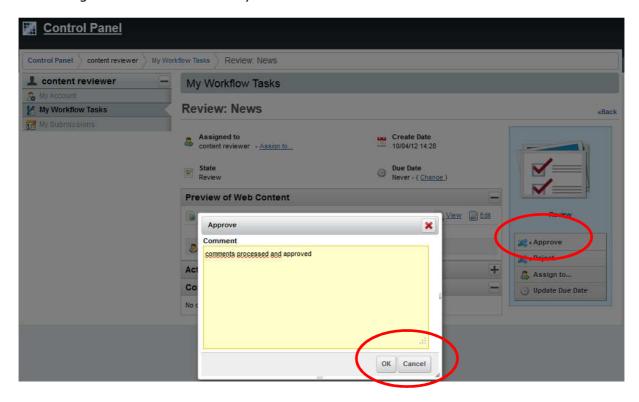
The content item that was rejected will appear in your list of workflow tasks.

3) Click on the Task to open the details for this content item. Now, review the history of the item and edit the web content item: remove the oldest news item and re-submit the item for review



Exercise 4 – Approving a proposed change

- 1) Login to CLIMATE-ADAPT as a user with the role content reviewer
- 2) Open the control panel to review the queue with submissions
- 3) Assign the resubmitted news web content to yourself for review. Click on the Task to open the details for this content item. Review the content and approve the content, adding a comment if necessary.



4) Log out and view the result as a CLIMATE-ADAPT visitor



3) Maintenance of CLIMATE-ADAPT database items

The CLIMATE-ADAPT database contains information on climate adaptation related knowledge sources. To be more precise, the database items are not the knowledge source, but describe the source and thus contain metadata describing an information source and a reference to that source. These items can be accessed by the CLIMATE-ADAPT end user in several ways:

- Through the CLIMATE-ADAPT search page
- In different sections of CLIMATE-ADAPT as targeted lists of items related to that section
- In various interactive tools in CLIMATE-ADAPT
 - o The adaptation support tool (e.g. lists of documents in further reading)
 - The case study search tool (for case studies)

Besides, users registered as EIONET users can log in and propose new database items through the "Share your information" section.

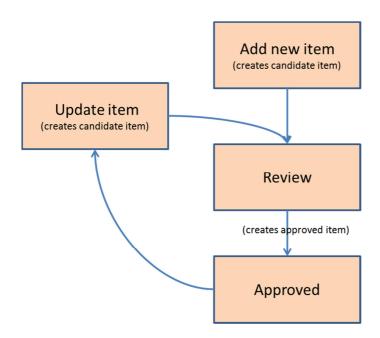
The CLIMATE-ADAPT database contains different types of database items:

- Publications and reports;
- Information portals;
- Guidance documents;
- Tools:
- Research and knowledge projects;
- Adaptation options;
- Case studies;
- Organisations;
- Maps, graphs and datasets

These information types all required a base set of descriptive metadata and can be tagged with keywords and tagged for different categories. Moreover, the information types research and knowledge projects, adaptation options, case studies and maps, graphs and datasets, have additional metadata fields. Annex 1 describes these different database items and especially the specific metadata fields to be provided for the different types.

Maintenance Workflow

The figure below describes the workflow for the management of CLIMATE-ADAPT database items. Newly created items start their lives as (unapproved) *candidate items*. Candidate database items are not visible to public users until they are approved. Upon review and approval the item becomes an approved item and becomes visible for public users. When an existing item is edited, a copy candidate item is created. This copy goes through the review/approval process and when approved, the item becomes an approved item, and replaces the former database item.



The following roles are relevant for the implementation of this workflow:

Role: User

Users (all users of Climate-ADAPT can request an EIONET account and thereby become a 'user') can access the functions to submit a new database item when logged in with their EIONET account's username and password from the 'Share your information' page.

Role: Power User

Power Users (e.g. EEA, ETCs) can add and edit CLIMATE-ADAPT database items and create candidate item for approval by Content Reviewers.

Role: Content Reviewer

Content Reviewers (EEA) review and reject (or ask for further changes) or publish submitted CLIMATE-ADAPT database items.

- **Public users** (i.e. not logged-in with their EIONET account's username and password) can access the 'Share your information' page and access a link that allows them to **log in and get the 'user' role**.
- Users can access a link to submit information. An on-line template can be filled in and submitted, which creates a (new) candidate item to be approved in the review process
- Power users can review, add and maintain candidate CLIMATE-ADAPT database items (maintain menu). Power Users can edit earlier approved items. The proposed changes then become a candidate item. Meanwhile the existing database item stays visible to public users (the existing database item gets locked) until the candidate item is approved. It cannot be edited or deleted until it is approved or deleted.
- **Content reviewers** can approve new and edited CLIMATE-ADAPT database items
- **Power Users** can delete candidate items; they cannot delete approved items.
- **Content reviewer** can delete all database items (candidate and approved).

- **Public users** (i.e. not logged-in with their EIONET account's username and password) can access the 'Share your information' page and access a link that allows them to **log in and get the 'user' role**.
- Users can access a link to submit information. An on-line template can be filled in and submitted, which creates a (new) candidate item to be approved in the review process
- Power users can review, add and maintain candidate CLIMATE-ADAPT database items (maintain menu). Power Users can edit earlier approved items. The proposed changes then become a candidate item. Meanwhile the existing database item stays visible to public users (the existing database item gets locked) until the candidate item is approved. It cannot be edited or deleted until it is approved or deleted.
- **Content reviewers** can approve new and edited CLIMATE-ADAPT database items
- **Power Users** can delete candidate items; they cannot delete approved items.
- **Content reviewer** can delete all database items (candidate and approved).

Exercise 1 – Viewing and exploring the currently available database items (power user, content reviewer)

1) Login to CLIMATE-ADAPT as a user with the role power user or content reviewer and choose "Maintain" and submenu "Aceitems" from the menu.



This will show the complete list of available database items. You can explore this list in several ways:

- 2) Browse through the list with the browse functions (first, last, next, previous and the page selector)
- 3) Click on one of the headers to sort the list on that specific field
- 4) Click on the title of an item to review the complete metadata sheet (as also shown to the outside world) for this item. You can see that you have the option to edit this item through the edit button.



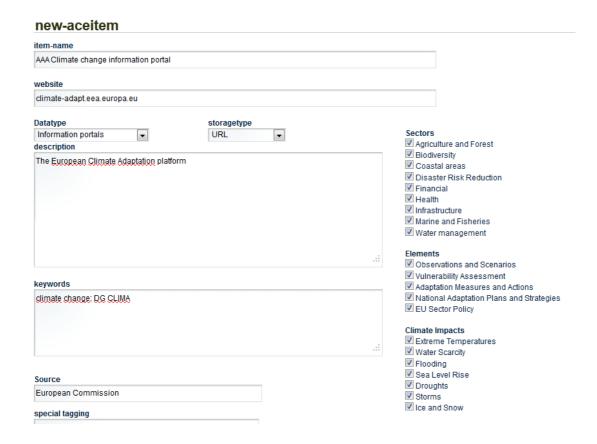
An alternative way to browse and access the database items is by using the search function. Mind that the search function only provides you with the "Approved" database items.

Exercise 2 – Adding a database item of category "Information portals" (power user)

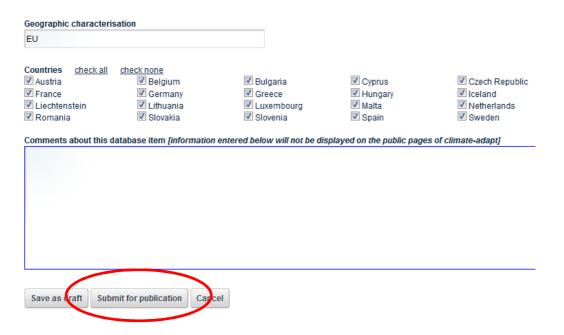
- 1) Login to CLIMATE-ADAPT as a user with the role Power User and choose "Maintain" and submenu "Aceitems" from the menu.
- 2) The button "add-aceitem" will open the form to create a new database item



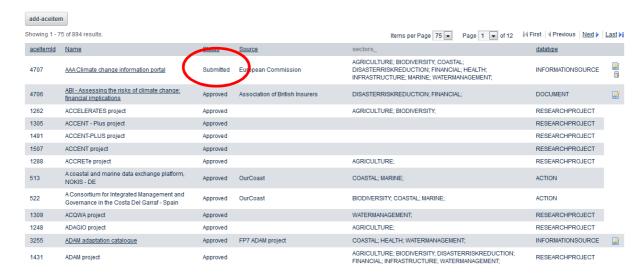
- 3) First select the correct datatype "Information portals"
- 4) Fill in the descriptive fields: item name, website and description
- 5) Tag the item with the correct tags for sectors, elements, climate impacts and countries



- 6) Fill in the fields source and geographic characterisation
- 7) Now save the new database item item



Saving the item will bring you back to the list of database items, in which your new item will be added with the status submitted. It has become a candidate database item, which still has to be approved in order to appear in CLIMATE-ADAPT.



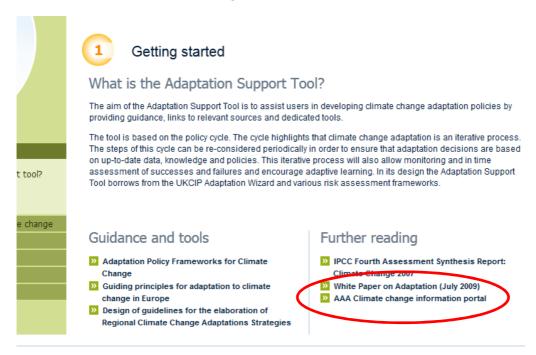
Mind that this is also the status of the items that are proposed by the adaptation community through the "Share your information" section and that this will generally be the status where the ETC reviewer comes in.

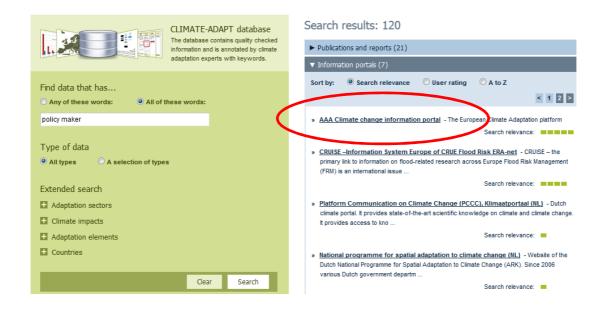
Exercise 3 – Approve a candidate database item (content reviewer)

- 1) Login to CLIMATE-ADAPT as a user with the role content reviewer and choose "Maintain" and submenu "Aceitems" from the menu.
- 2) Click on the status header in order to sort the database items with the submitted items on top.
- 3) Click on the edit button and change the content if necessary, e.g. add the keyword 'policy maker'
- 4) Add the special tag "ast1" in order to have the item appear in the item list in the section further reading of the Adaptation Support Tool step 1. (see Annex 3 for a complete list of currently used special tags)
- 5) After reviewing the item and if necessary correcting the content of the item, approve it with the "Approved" check box
- 6) Save the database item

climate change; I G Cl	LIMA, policy maker			✓ National Adaptation Plans ar ✓ EU Sector Policy
				Climate Impacts ☑ Extreme Temperatures ☑ Water Scarcity
Source				☑ Flooding ☑ Sea Level Rise ☑ Droughts
European Commissio	n			✓ Storms
special tagging			Į.	Ice and Snow
ast1				
Geographic characteri	ication			
EU	isation			
Countries check all				
Austria	☑ Belgium	☑ Bulgaria	☑ Cyprus	
▼ France	☑ Germany	☑ Greece	Hungary	
Liechtenstein	✓ Lithuania	Luxembourg	✓ Malta	✓ Netherlands
Romania Romania	✓ Slovakia	✓ Slovenia	✓ Spain	Sweden
Comments about this	database item <i>[informatio</i>	n entered below will not be di	splayed on the public pag	es of climate-adapt]
reviewed by John Doe,	added keyword policy mak	er, special tagging ast1 for ad	aptation support tool step 1	l, <u>further</u> reading
☐ High importance		by: power user (poweruser	®wur.nl)	

7) Log out and look for the item in the further reading section of the Adaptation Support Tool and find the item through the CLIMATE-ADAPT search function.





Annex 1

This Annex describes the available types of CLIMATE-ADAPT database items and the set of available metadata fields for these types.

Mind that the type Maps, graphs and datasets is a special type regarding the delivery and maintenance of content. In general, for maps and datasets INSPIRE compliant metadata needs to be provided. In the case of maps, this metadata needs to be connected to an INSPIRE compliant view service in order to be able to serve the map as an interactive map through the CLIMATE-ADAPT mapviewer. Due to the relative complexity of the metadata and the configuration of metadata and map service, the inclusion maps and datasets follows a different procedure.

From the CLIMATE-ADAPT page on sharing information: "Providing and including spatial data in the CLIMATE-ADAPT map viewer requires specific discussions on various technical issues. Thus researchers who are interested in proposing spatial data to be included are advised to contact the CLIMATE-ADAPT administrator".

Types of CLIMATE-ADAPT database items

The table below states the types of database items, their definition and also examples of the current sources described by this type.

Category	Definition	Current content
Publications and reports	Reports, documents, publications. Policy documents and acts, e.g. adaptation plans of member states.	Consistent. Also contains policy documents listed with EEA (www.eea.europa.eu/themes/-climate/national-adaptation-strategies)
Information Portals	Information portals related to adaptation. Includes e.g. wiki's and (interfaces on) databases	 Information portals databases (e.g. EM-DAT, OURCOAST) web pages (e.g. EVDAB composite indicators)
Guidance	Guidance documents, portals, sections of portals and web pages specifically aimed at guidance.	- Guidance documents & pages "Everything that is agreed upon as being guidance"
Tools	Interactive tools / Decision support systems, models, tools for CBA.	- Decision support systems
Maps, Graphs, Datasets	Datasets, maps and graphs related to climate change adaptation → observations, projections, impacts, risks etc. Including also map viewers	- Maps - map viewers (Floods portal, MARSOP viewer etc) To be extended with (interactive) maps
Indicators	Specific datasets of high European relevance and quality, indicative for adaptation elements and sectors	- at present mostly the EEA Indicators. Links to webpage may contain maps links in future
Research and knowledge projects	Research and knowledge projects (and programmes) aimed at developing the CCA knowledge base.	Includes EU FP projects, national research projects (only through Infobase), and Interreg and possibly Life+ projects. Projects that are more a case studies to be extracted.
Adaptation options	Descriptions of options (methodologies, possible actions) for climate adaptation	Currently: ClimWatAdapt, options entered by hand, Refresh. Aim for comprehensive set(s) in future rather than exhaustive.
Case studies	Descriptions of practical cases, projects, studies that implemented / investigated (a set of) adaptation options in practise	[to be screened for relevance] criteria: - EEA 32 - Deal with adaptation (so leave out those only on mitigation) - Has location and organisation - Can be big or small - To include more from Interreg
Organisations	Organisations and co-operative programs working in the domain of climate change adaptation	Consistent. Co-operative programs such as PROVIA are included here (excludes research programs)

Metadata fields per CLIMATE-ADAPT database item type

The following tables describe the metadata fields available for the different types of database items.

<u>Metadata fields - Publications and reports, Information Portals, Guidance, Tools, Indicators, Organisations, (Maps, graphs & datasets)</u>

Field	Definition	Comments
Name	Name of the item	Free text. Compulsory field. Suggested length max. 10 words
Website	Website where the item can be found or is described	Free text. NOTE: more than one site possible, separated by ';'.
Datatype	Data type of item	Dropdown box [Publications and reports, Information Portals, Guidance, Tools, (Maps, Graphs, Datasets), Indicators, Organisations]. Will not be displayed.
storagetype	URL OR geonetwork	Dropdown. Geonetwork is to be used for interactive WMS maps with metadata available in GeoNetwork. Otherwise URL (default)
Description	Description of the item	Free text
keywords	Keywords related to the item	Free text
Source	Source of the item	Free text. E.g. organisation or project from which item was derived.
special tagging	Special tags that allow for linking the item to a specific page in CLIMATE-ADAPT or search term	Free text. This field is not displayed to user.
Geographic characterisation	Allows for characterisation of the area to which the item applies	Free text. Select from [Global, Europe / Transnational / National / Regional / Local / City] [Add location name if provided] [add name of county or transnational region if the item is to appear on national or transnational pages (Error! Reference source not found.)] [optional: add other qualification as 'mountain area' as appropriate]
Countries	Nuts member state country codes separated by ';'	Needed for country search. See section Error! Reference source not found

Sectors	EU policy sectors that the database item relates to	Tick box. Tick the related sectors. Multiple sectors can be selected.
Elements	Adaptation element that the database item relates to	Tick box. Tick the related element. More than one allowed
Climate Impacts	Climate Impact that the database item relates to	Tick box. Tick the related Climate Impacts. More than one allowed
Comments	Any comments provided with the item	Free text. This field will not be visible to users.
High importance	To indicate particular importance of item.	Tick box [tick: Yes]. Influences rating (in search and e.g. links list).
Approved	Information about (previous) edits and reviews.	Edited by: list of user names. Tick box for indicating that current user approves item.

<u>Metadata fields – Research and knowledge projects</u>

Field	Definition	Comments
Acronym	Acronym of the project	Free text. Compulsory field
Title	Project title or name	Free text. Compulsory field
Lead	Lead organisation or individual of the project	Free text
Website	Project website	Free text. NOTE: more than one site possible, separated by ';'.
Abstract	Project abstract	Free text. Focus on project outputs. Possibly on specific website features.
Partners	Information about project partners (organisation names)	Free text
keywords	Keywords related to the project	Free text
Sectors	EU policy sectors that the database item relates to	Tick box. Tick the related sectors. Multiple sectors can be selected.
Elements	Adaptation element that the database item relates to	Tick box. Tick the related element. More than one allowed
Climate Impacts	Climate Impact that the database item relates to	Tick box. Tick the related Climate Impacts.
Funding	Source of funding	
Duration	Duration of project. Start and end date [yr]	Free text
Source	Source from which project was retrieved.	Free text. E.g. specific database

special tagging	Special tags that allow for linking the item to a specific page in CLIMATE-ADAPT or search term	Free text. This field is not displayed to user.
Geographic characterisation	Allows for characterisation of the area to which the item applies	Free text. Select from [Global, Europe / Transnational / National / Regional / Local / City] [Add location name if provided] [add name of county or transnational region if the item is to appear on national or transnational pages (Error! Reference source not found.)] [optional: add other qualification as 'mountain area' as appropriate]
Country	European countries	Tick box. Needed for country search.
Comments	Any comments provided with the item	Free text. This field will not be visible to users.
High importance	To indicate particular importance of item.	Tick box [tick: Yes]. Influences rating (in search and e.g. links list).
Approved	Information about (previous) edits and reviews.	Edited by: list of user names. Tick box for indicating that current user approves item.

<u>Metadata fields – Case studies, Adaptation Options</u>

Field	Definition	Comments
Name	Name of the item	Free text. Compulsory field. Suggested length max. 10 words
Website	Website where the item can be found or is described	Free text. Note: may refer to the original document describing a measure and does not have to refer back to the project that e.g. collected measures.
Description	Description of the item	Free text
Legal aspects	Information about legal aspects and institutional barriers	Free text
Stakeholder participation	Information about actors to be involved and stakeholder participation	Free text
Contact	Contact details	Free text. Especially relevant with case studies
Success / limitations	Information about success factors or possible	Free text

	limiting factors	
cost / benefit	Information about coast and benefits	Free text
keywords	Keywords related to the item	Free text
Sectors	EU policy sectors that the database item relates to	Tick box. Tick the related sectors. Multiple sectors can be selected.
Elements	Adaptation element that the database item relates to	Tick box. Tick the related element. More than one allowed
Climate Impacts	Climate Impact that the database item relates to	Tick box. Tick the related Climate Impacts. More than one allowed
Implementationtime	Indication of time needed to implement the measure	Free text. Typically entered as a time range (e.g. 5-10 yr)
Lifetime	Indication of the life time of the measure	Free text
Source	Source of measure. The project or database from which the measure was retrieved.	Free text
special tagging	Special tags that allow for linking the item to a specific page in CLIMATE-ADAPT	Free text. This field is not displayed to user.
Geographic characterisation	Allows for characterisation of the area to which the item applies	Free text. Select from [Global, Europe / Transnational / National / Regional / Local / City] [Add location name if provided] [add name of county or transnational region if the item is to appear on national or transnational pages (Error! Reference source not found.)] [optional: add other qualification as 'mountain area' as appropriate]
Туре	Adaptation option OR Case study	Duo click box. Select either of the two types
Locate	Location of the case study (this option is not provided if 'adaptation option' is checked above).	Clickable map or fields to provide latitude / longitude. This location is used to put case study on map.
Countries	Nuts member state country codes separated by ';'	Click boxes. Needed for country search, see section Error! Reference source not found.
Comments	Any comments provided with the item	Free text. This field will not be visible to users.
High importance	To indicate particular importance of item.	Tick box [tick: Yes]. Influences rating (in search and e.g. links list).
Approved	Information about (previous) edits and reviews.	Edited by: list of user names. Tick box for indicating that current user approves item.

Note: fields will be added indicating the name of the reviewer and possibly comments of the reviewer. These fields will not be shown to the regular user.

Annex 2 - CLIMATE-ADAPT roles relevant for maintenance

The workflow for submitting new/updated information is different depending on whether IT and content maintenance relates to web content (mainly text) or an item of Climate-ADAPT's database.

Role: Administrator

The Administrators at the EEA will have the full access to Climate-ADAPT for its maintenance (e.g. IT/software, web design).

Web content

Role: Writer

Writers (e.g. EEA, ETCs) can edit existing web content and submit it for publication.

Role: Content Reviewer

Content Reviewers (EEA) review and reject (or ask for further changes) or publish submitted web content.

Database items

Role: User

Users (all users of Climate-ADAPT can request an EIONET account and thereby become a 'user') can access the functions to submit a new database item when logged in with their EIONET account's username and password from the 'Share your information' page.

Role: Power User

Power Users (e.g. EEA, ETCs) can add and edit CLIMATE-ADAPT database items and create candidate item for approval by Content Reviewers.

Role: Content Reviewer

Content Reviewers (EEA) review and reject (or ask for further changes) or publish submitted CLIMATE-ADAPT database items.

Annex 3 – Special tagging !!! TO BE COMPLETED in the final version !!!

The table in this annex documents the special tags used to connect CLIMATE-ADAPT database items to specific items lists that are part of the different sections of CLIMATE-ADAPT.

Adding the given special tag to the metadata field special tagging will force the item to appear in the targeted item list.

Tagging is NOT caps sensitive.

The field for special tagging can contain more than one tag. Tags are separated by spaces (or commas).T

Тад	For adaptation support tool (AST)	Selected types
astxx-yy	Tagged for a specific page in the adaptation support tool (AST). With: xx: main step, yy: sub step. E.g. ast1-2: item tagged to be displayed in step 1.2 in the AST. ast2: item tagged to be displayed in (main) step 2 in the AST.	List "Guidance and Tools": - Tools - Guidance - Indicators - Maps, graphs and datasets List "Further reading": - Publications & Reports - Information portals - Research & knowledge projects - Organisations Lists "Indicators" - Indicatros Lists "Interacotve maps" - Maps, graphs, datasets Cost-benefit database
ast4-cbdatabase	Cost-benefit database in Adaptation support tool	All types
	For sector pages	
yyRESOURCE	Where yy is the first word in the name of the sector, with the exception of 'agriculture and forestry', which we tag as AGRIFORESTRYRESOURCE. Tags: BiodiversityRESOURCE CoastalRESOURCE DisasterRESOURCE FinancialRESOURCE HealthRESOURCE InfrastructureRESOURCE	

	MarineRESOURCE WaterRESOURCE	
	For vulnerability and risk pages	
water	WaterRESOURCE (note: we use the same tag as for related sector pages)	
cryosphere	CryosphereRESOURCE	
terrestrial biosphere (including biodiversity, agriculture and forestry)	BiodiversityRESOURCE	
marine impacts	MarineRESOURCE	
urban areas and health	UrbanRESOURCE	
atmosphere	atmosphereRESOURCE	
General, main page	vuln-risk-gen	
	For observations and scenario pages	
obs-scen-zzz	Various tags for general (obs-scen-gen) and subpages (obs-scen-zzz), with zzz first letters of page topic	
Indicators, general	Obs-scen-gen	
Indicators, marine	Obs-scen-sea	
Indicators, water	Obs-scen-wat	
Indicators, biosphere	Obs-scen-ter	
Indicators, urban/health	Obs-scen-urb	
Indicators, atmopshere	Obs-scen-atm	
	For adaptation measures pages	
Main page	adapt-meas-gen	
	Other tags	
uncertainty	Database items to appear in uncertainty guidance	
glossary	Database items to appear with glossary	

linksection	Database items to appear in links section	
Costs	Database items specific for monetary valuation and costs of adaptation	