



# **A User's Guide to the Central Portal of the Biosafety Clearing House**

## **“Registering Data in the BCH Central Portal”**

### ***Using the Management Centre***

2<sup>nd</sup> Edition  
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## 1. INTRODUCTION TO THE MODULE

### What you will learn in this module:

- **About the Central Portal and the Management Centre**
- **To register and sign in to the BCH Central Portal**
- **To manage your personal profile**
- **To register core reference records**
- **To manage submitted records**
- **To manage users**
- **To use the virtual mailbox**

### **A. Context**

The UNEP-GEF Project for Capacity Building for Effective Participation in the Biosafety Clearing House (BCH) is preparing a modular training package that aims to provide a practical “how-to” guide for countries to assist them in learning, understanding, using, and setting-up national access to the BCH. The training package is designed to be flexible and is tailored to meet diverse needs of different countries, allowing them to select those tools and ideas that are most useful to their situation, needs and priorities. The training package is divided into four modules, each addressing one element of the Biosafety Clearing House (BCH).

### **B. Audience**

This module was designed to provide guidance to users of the Biosafety Clearing House (BCH). It was developed for a non-technical audience with little or no knowledge of the Cartagena Protocol and the BCH, but a need to input data, access and use data, or set-up the IT-related components of the BCH. Functionality of the Users of the BCH is limited to those who have particular levels of access. National Focal Points (NFPs) and data entry personnel.

### **C. Purpose**

This module demonstrates the process of **registering information online**, using the Management Centre of the Central Portal. The web-based Central Portal allows governments to administer their information directly in the BCH databases. These databases, which form the nucleus of the BCH, can be used to register information pertinent to the Cartagena Protocol.

It is also possible to register information with the BCH in other ways, as long as the common formats for submitting information are used.

Email: Common formats can be emailed to the Secretariat at [bch@biodiv.org](mailto:bch@biodiv.org)

Fax: Common formats can be faxed to the Secretariat at +1 514-288-6588

As an example, you can refer to the instructions for registering new information within this guide, as much of the procedure is similar. More information on common formats can be found in this User Guide, [page 14](#), and in the online help documentation (Module 5: Organizing your Data) located at: <http://bch.biodiv.org/mod5/overview.html>. Because of possible delays, postal mail may not be a viable solution for certain categories of information that must be registered according to strict timelines (e.g. final decisions regarding domestic use of LMOs for food or feed, or final decisions for processing under Article 11.1 of the Protocol, which must be made available through the BCH within fifteen days of making the decision).

#### **D. Information Flow through the Central Portal**

For entering new records or editing existing records:

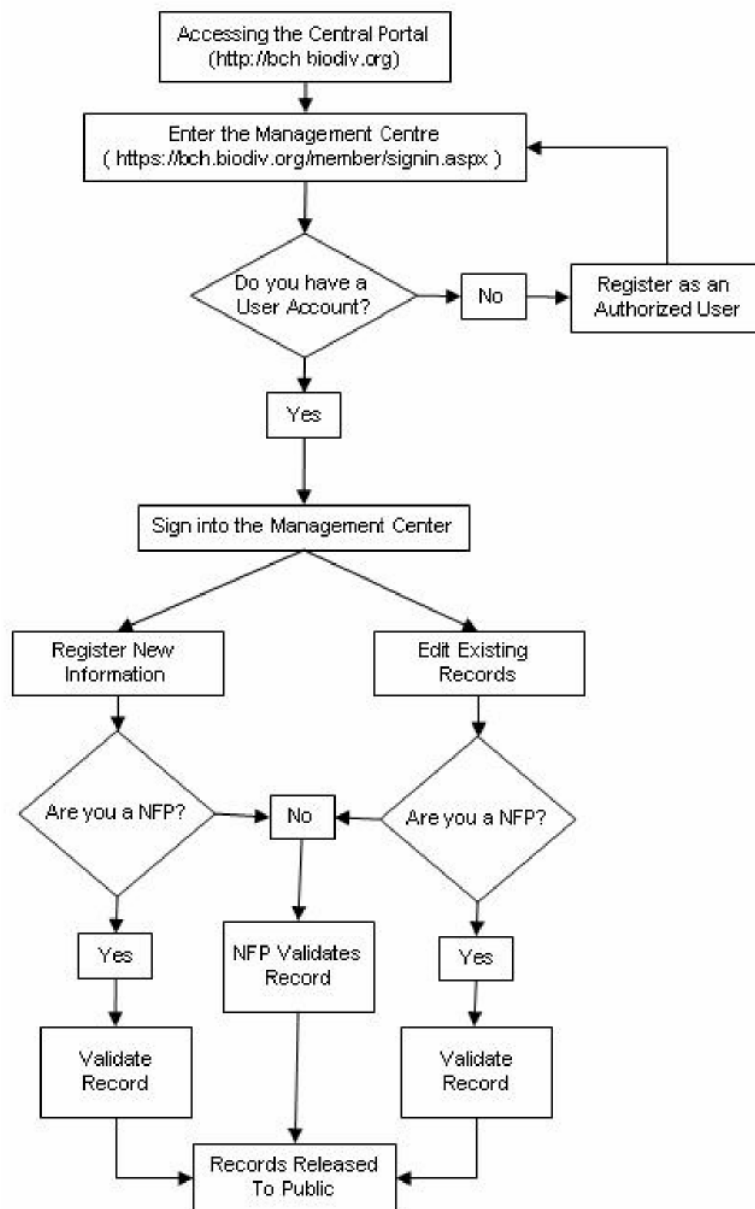


Figure 1: Flow Chart for Entering/Editing Records in the BCH Central Portal

## 2. ACCESSING THE BCH CENTRAL PORTAL

The Central Portal is the gateway to all of the functionality of the BCH website. It has been designed to make the two primary activities of finding information and registering information (as obliged by the Protocol) as clear and intuitive as possible, as well as to provide documentation and other resources. The Central Portal is administered by the Secretariat of the Convention on Biological Diversity (CBD), which is also the Secretariat of the Biosafety Protocol.



### OVERVIEW

You access the BCH Central Portal through the website at <http://bch.biodiv.org>. It is the gateway to accessing all information in the BCH. The CBD Secretariat are the administrators of the site.

The welcome, or opening, page of the Central Portal of the Biosafety Clearing-House (BCH) can be used to access all areas of the Central Portal.

BCH website address: <http://bch.biodiv.org>

For ease of navigation, the welcome page is divided into seven sections. From left to right (Figure 1, below):

- Left Side Bar: Contains a quick search tool and additional means of navigating the website.
- Finding Information: Provides an entry to the individual BCH databases (National Contacts, Laws & Regulations, Decisions & Declarations, Capacity Building, Roster of Experts)
- Registering Information: Provides an entry to the Management Centre, where authorized users can register information with the BCH databases.
- Resources: Provides links to other useful resources within the website, including help pages, BCH discussion forums, bibliographic information, upcoming biosafety meetings, relevant sites and tools, and other resources.
- Latest Additions: Links to the most recent Cartagena Protocol information posted to the BCH.
- Latest [News](#): Information about new features in the BCH Central Portal
- Right Side Bar: Contains help pages, such as frequently asked questions (FAQs), modules on finding information, and modules on registering and organizing your data.

Additional information on the Central Portal can be found in the online help documentation (Module 1: The Central Portal), located at: <http://bch.biodiv.org/mod1/overview.html>.



Exercise 1: Go to the BCH Central Portal.



Exercise 1: Solution

1. Connect your computer to the Internet
2. Open your Internet Browser
3. In the address bar of your browser, type: <http://bch.biodiv.org/>
4. Press the "Enter" key on your keyboard
5. Use your computer mouse or keyboard to familiarize yourself with the website.

### 3. THE MANAGEMENT CENTRE

The Management Centre of the BCH is the data entry interface for registering, updating, deleting or correcting information for the BCH. Access is restricted to BCH users with an account. Anyone can register for an account with the Management Centre; however, only information that is validated by the BCH National Focal Point or the CBD Secretariat will be published on the BCH.



#### OVERVIEW

The BCH Management Centre is where account holders register information with the BCH. Information is published only after it has been validated (i.e. verified for accuracy) by either a BCH Focal Point or the CBD Secretariat.

A link to the Management Centre can be found on the BCH Welcome Page, under “Registering Information.”

*Figure 3: Link to the Management Centre on BCH home page*

From this link, the “Sign In to the Management Centre” page appears. Other options on this page include account creation, password reminders, and basic information about entering data into the Management Centre.



#### Exercise 2: Find the Management Centre

From the Welcome Page to the BCH Central Portal, click on “Enter the Management Centre...”

Or, in the address bar of your browser, type in the following:  
<https://bch.biodiv.org/member/signin.aspx>



#### Exercise 2:

1. Connect your computer to the Internet
2. Open your Internet Browser
3. In the address bar of your browser, type: <http://bch.biodiv.org/>
4. Press the “Enter” key on your keyboard

Use your computer mouse or keyboard to familiarize yourself with the website.



## 4. GETTING A BCH ACCOUNT



### OVERVIEW

You can access any BCH record without an account. Getting an account allows you to join the mailing list, participate in the discussion forums and register information - you can sign up for an account through the Management Centre. Registration of some information types is restricted to certain users (e.g. national information is restricted to governments). All records have to be “validated”, i.e. approved before they are published on the BCH.

### A. *Signing up for a BCH account*

Any user can search the BCH databases and website **WITHOUT** an account. The registration process is only necessary if you require the ability to register information with the BCH or wish to receive e-mail notifications from the BCH Current Awareness Service listserv or the BCH Information Technology Specialist Update listserv. For more information on these two additional services, please visit the Central Portal (click on “Mailing Lists” within the left-hand navigation) or type the following web address into your browser:

<http://bch.biodiv.org/member/maillinglist.shtml>

Creation of accounts for online registration of most information via the Management Centre is restricted to specific user categories.

A user ID and password can be requested by completing this online application process or by sending a signed letter or fax to the Secretariat. Certain types of accounts (e.g. BCH National Focal Points) may require additional verification before they can be created. Once registered, you will be sent a welcome message and a temporary password.

### B. *Validation and types of account*

To ensure the accuracy of information available through the BCH, records for most types of user must be “**validated**”, i.e. approved for publishing.

Records submitted by BCH National Focal Points are automatically validated. Records created, modified, or deleted by National Authorized Users are validated by the BCH National Focal Point for their country. The CBD Secretariat validates other categories of information (such as information resources) entered by other categories of users to ensure their relevance to the mandate of the BCH.

### C. *National Focal Points*

**BCH National Focal Points** are authorized to use the BCH Management Centre to create, delete, or modify information pertaining to national contacts, laws and regulations, decision information, organisms, risk assessments, biosafety experts,

capacity-building needs and priorities, capacity-building activities and news items for their country. Only the BCH National Focal Point has the authority to "validate" information for that country (i.e. verify the accuracy of the record and make it public), and to create new authorized users for the country.

Before creating an account for a BCH National Focal Point, the CBD Secretariat must receive **written confirmation** of the nomination to this post. Written confirmation may either be sent by fax or postal mail to the Secretariat on Ministry letterhead, signed by a Focal Point for the Protocol or Convention, or responsible Minister. Email confirmation may be used, as long as the email originates from an account that has previously been validated by the Secretariat (i.e. an existing focal point).

#### ***D. National Authorized Users***

BCH National Focal Points may also nominate additional **National Authorized Users**, who are permitted to register information in any or all of the information categories as appropriate. However, to ensure the authenticity of the information, the BCH National Focal Point is required to verify the accuracy of any record and **validate** it before it is made public.

New National Authorized User accounts must be authorized by the BCH National Focal Point before they can be finalised.

Before creating an account for a BCH National Focal Point, the CBD Secretariat must receive **written confirmation** of the nomination to this post. Written confirmation may either be sent by fax or postal mail to the Secretariat on Ministry letterhead, signed by a Focal Point for the Protocol or Convention, or responsible Minister. Email confirmation may be used, as long as the email originates from an account that has previously been validated by the Secretariat (i.e. an existing focal point).

#### ***E. Biosafety Experts***

Registered **Biosafety Experts** can be given permission by their BCH National Focal Point to modify any information pertaining to their own **Expert Record** in the Roster of Experts. As with other Authorized Users that modify information under national jurisdiction, these changes will have to be validated by the BCH National Focal Point before they are published.

New Biosafety Expert accounts must be authorized by the BCH National Focal Point before they can be finalised.

#### ***F. Organizations***

Organizations that are involved with capacity-building work can create and modify records relating to **capacity-building projects** and **capacity-building opportunities**, as well as records in the **Academic Compendium of Biosafety Courses**. They may also wish to participate in the Biosafety Capacity-Building Network (see Module 3: Networking).

Registration and modification of records by Organizations have to be **validated by the Secretariat** before they are published.

## G. General users

General users can create and modify records in the **Biosafety Information Resource Compendium** and suggest organizations for inclusion in the **Directory of Organizations involved in Biosafety Activities**.

## H. Email Listserv and Discussion Forums

A user account is required to register for the BCH Email listservs (see Module 3: Networking) or to participate in the BCH Discussion Boards (see Module 4: Resources). **All types of user account** are eligible to receive the mailing list, or to post comments in the Discussion Forum.



### Exercise 3: Sign up for a BCH Account



### Exercise 3: Solution

*If you already have a user ID and password, you can immediately sign in the BCH central portal. Go to the Section: "Signing into the Management Centre."*

*If you do not have access to your email account (to receive your password) please ask an instructor for assistance.*

1. From the BCH Management Centre page, click on "Sign Up for a BCH Account" or, in the address bar of your browser, type in the following: <https://bch.biodiv.org/member/signup/start.shtml>
2. Select the radio button next to the profile according to your personal situation.
3. Click on "Continue" to validate your choice. You can always exit the registration process by clicking on "Cancel request".

**Steps 4 and 5 apply to government users only (i.e. BCH National Focal Points, National Authorized Users and Biosafety Experts. Other users should go to step 6.**

4. From the drop down list, select the name of the country corresponding to the government by which you are nominated. If your country is not listed, cancel this request and send a separate email to the CBD Secretariat, [bch@biodiv.org](mailto:bch@biodiv.org)
5. Click "Continue" to validate your choice. You can always exit the registration process by clicking on "Cancel request".
6. Provide personal Information. Some fields, marked with a red star, are mandatory. If one of these fields is empty the sign up process will ask you to fill in the specific field.
7. Click on "Submit request" to confirm your choice. Once the form has been submitted it will be automatically processed. The BCH will automatically send an e-mail to the address you provided to confirm your subscription and give you details of your new account.

## 5. LOGGING IN TO THE MANAGEMENT CENTRE

### A. *Logging in to the Management Centre*

Before logging in, you need to have created an account (see Section 4: Getting a BCH Account above).

To log in, simply enter the **Email Address** you used to register for an account and your **password** on the Sign-in page of the Management Centre and click the **Sign-in** button.

If you check the “**Remember me**” box, you will not have to provide your email address the next time you will use the BCH Central Portal, as long as you are signing in from the same computer. However, this option should be used only if no-one else has access to your computer.

**Warning:** *If you use a shared computer, don't check the “Remember Me” box as other persons may be able to use your account.*

### B. *Security*

The Management Centre is protected from unauthorized registration through a secure system of information exchange called Secure Socket Layer. The email address and password system to control access and use is also an important part of the security system and it is therefore very important to choose a password that is difficult to guess, and to keep your password safe.

Some important things to remember about protecting your password (and your BCH account):

- Never share your password. This is particularly important for National Focal Points, since they are responsible for the activities carried out with their account, and they have important validation privileges for their government's information.
- Do not write your password down as it can easily be stolen.
- Change your password with some frequency. How often you do this depends on what you are protecting, e.g. National Focal Points would be expected to change their passwords more often than a general user would.
- Do not store your password in a program (such as a web browser). It is not difficult for people to recover your password from inside one of these programs, particularly if they have access to your computer.

### C. *Choosing a password*

Choosing a good password can be difficult because you want it to be fairly long and difficult to guess, but you also need to remember it easily (without writing it down). BCH passwords are **case sensitive**, and should be **between 6 and 20 characters** long. You can use numbers or letters in the password.

Some hints on selecting your password include:

- Avoid using “dictionary words” (i.e. words that appear in a standard dictionary).
- Use a mixture of upper and lower case letter and numbers.

- Avoid using characters that don't appear on a standard keyboard (e.g. Euro symbol) since they may not work correctly in all circumstances (e.g. if you need to log in to your account while travelling).
- A popular method for selecting memorable passwords is to use letters and numbers from a phrase or song lyric. For example, "The Biosafety Protocol was adopted in January 2000" becomes "TBPwaiJ2000".

### ***D. Changing your password***

When your account is first created, you will be sent a temporary password by email. You must change this password the first time you log in to your account as a security measure. You can also change your password at any time by selecting the **Password Change** option in the left-hand menu under the "Registering Data" heading (this option appears only after you have logged in to your account).

### ***E. Forgotten Passwords or old email addresses***

If you don't remember your password, click on the "Forgot your password?" link on the Management Centre Sign-in page. A new password will be automatically sent to your e-mail address.

If you change your email address, you will need to contact the Secretariat to have the information in your old account transferred to your new address.



#### **Exercise 4: Log in to your BCH account.**

NOTE: If you already have a user ID and password, you can immediately sign in the BCH Management Centre. Otherwise go to the "Signing up for a BCH account" section first to register as a BCH authorized user.



#### **Exercise 1: Solution**

1. Enter the email you used to register to the BCH Central Portal in the "Registered email address" box. In the "Password" box, enter your password.
2. Click the "Sign in" button to enter the Management Centre.
3. If this is the first time you have signed into your account, you will be requested to change your password before proceeding any further. Enter the temporary password you were assigned in the **Original Password** field.
4. Choose your new password, then enter it twice: first in the **New Password** field, and then in the **Confirm New Password** field. Then click on the "Continue" button to enter the Management Centre.

## 6. MANAGING YOUR PERSONAL PROFILE

### A. *Accessing your account information*



#### OVERVIEW

Your Profile contains your email address and other contact information. It can also be used to set your language preferences and time zone. You can input an additional email address to receive copies of correspondence.

Your account information can be accessed through the link called **My Profile** that appears in the left-hand menu after you have logged in to your account.

In addition to your contact details, the profile section allows you to choose your preferred language from the six official UN languages supported by the BCH (Arabic, Chinese, English, French, Spanish and Russian) and your time zone.

### B. *Copies of correspondence to an additional email address*

If you wish the BCH to send a copy of email correspondence to an additional email address, enter the second address into the **Optional Cc** field that appears under your email address in the “Identification” section. You may wish to do this, for example, if you have registered with a work email address that is not very reliable or does not allow remote access, and you would like emails copied to a personal account.

### C. *Privacy of personal information*

Your personal profile details can only be viewed by you and the CBD Secretariat. Your address and telephone information will be only accessed by the Secretariat if important emails sent by the BCH fail to reach you (i.e. email requests relating to information you have registered with the BCH).

**Note:** National Focal Points are required to make their contact information publicly available. However, because some focal point users include personal information (such as personal email addresses) in their personal profile, changing your profile section does not update the information in the publicly available record for the Focal Point. It is therefore very important to notify the CBD Secretariat in writing if your official contact details change.

### D. *Advanced Security Settings*

If you wish to put in place additional security, you may enable Client Certificate Authentication. Follow the link for **Advanced Security Settings** that appears just under the “My Profile” heading.

Client certificates are encrypted, digital identifications that contain personal information.

You can think of a digital certificate as the digital equivalent of a passport. Similar to conventional forms of identification, client certificates enable Web servers to authenticate, or confirm, the identity of a user before letting that user log on to a restricted Web site. The BCH will authenticate the client using an X.509 certificate, a public key certificate that conforms to a standard that is defined by X.509 Public Key Infrastructure (PKI).

You can obtain a client certificate from a mutually trusted, commercial organization, called a certificate authority. Before issuing a certificate, the authority requires you to provide identification information, such as a name, address, and organization name. The extent of this information can vary with the identification assurance requirements of the certificate. A list of certificate authorities is available by following the link provided in the BCH.



Exercise 5: Update your profile to include your preferred language and time-zone.



Exercise 5: Solution

1. Click on the "My Profile" link in the left hand menu.
2. In the **Language** field under the "Contact Details" section, select your preferred language from the drop-down box.

In the Time Zone field, select your preferred time zone from the drop-down box (note: time zones are expressed in relation to Greenwich Mean Time, or GMT).

Click on the "Update my profile" button at the bottom of the page.

## 7. REGISTERING NEW INFORMATION



### OVERVIEW

Use the Management Centre to select which type of record you wish to enter. Do not register confidential information on the BCH. All data is registered according to a “common format” for reporting information. National Focal Points have their records automatically validated; other users need their records to be validated by their National Focal Point or the CBD Secretariat before they are published.

### ***A. Registering New Information Index***

After you have signed into the Management Centre, click on “Register New Information”, the screen will display different categories of information that are presented as sets of hyperlinks and combo boxes.

You can create a new record by first selecting a category of choice from the drop down menu of categories provided and then clicking create which will immediately display a form in a new page that enable you enter information.

### ***B. Confidential information***

Because the objective of the Management Centre is to make information publicly available through the BCH, any records submitted through the Management Centre should NOT include information of a confidential or sensitive nature.

### ***C. Common Formats***

Each record in the BCH must be registered using the “Common Format” for registering information. Each form that appears in the Management Centre corresponds to the approved Common Format for that category of information. Common formats provide a standardized way to organize and present information, resulting in more effective searches. Although each type of record has a different common format, the procedure for registering information remains the same.

Moreover, much of the information that is registered must draw from various controlled vocabularies in order to maintain as much consistency of terminology as possible. This, too, helps make searches easier and more definitive. In addition, all controlled vocabularies will be translated into the six official languages of the United Nations, so that searches may be conducted in these languages.

Common formats and controlled vocabularies are ways in which information in the BCH databases can be tagged with descriptive information, or metadata. As a result, the use of common formats greatly simplifies searching for and locating information in the BCH databases.

For additional information on common formats and controlled vocabularies, read Module 4 on the BCH Thesaurus and Controlled Vocabulary.



#### ***D. Validation process***

To ensure the accuracy of information available through the BCH, records for most types of user must be “**validated**”, i.e. approved for publishing.

Before any information submitted through the Management Centre is made publicly available, it must first be validated by the BCH National Focal Point or the CBD Secretariat. After the record has been validated, the record creator will be sent an email confirming that the information has been uploaded to the database.

Should you notice any difference between your submission and the information made available on the web site, you should contact the Secretariat immediately by email at [BCH@biodiv.org](mailto:BCH@biodiv.org)

## 8. THE BCH TRAINING SITE



### OVERVIEW

The BCH Training Site looks just like the official site and can be used to practice registering records (without affecting the official site).

### ***A. Using the BCH Training Site***

A **BCH Training Site** has been implemented to help you familiarize yourself with the functioning of the BCH's Management Center, and to practice registering information with the BCH.

The training site, which includes the same functionality of the true site, allows for entry of sample records, training on website navigation, validation of records, and overall familiarity of the website. It allows country personnel to become familiar with entering and managing data, without the implications of making public “real” data that may not be complete.

BCH Website: <http://bch.biodiv.org>

BCH Training Site: <http://bchtraining.biodiv.org>

The information registered on the Training Site does not affect the official BCH site and, because the site is secure, it is not made publicly available. (Similarly, the information registered on the official BCH site is not always available on the Training Site.)

**Warning:** You should always make sure you are logged in to the BCH Training Site if you want to register a test record.

### ***B. Accessing the Training Site***

You can access the BCH training site either through the link on the **Home Page**, or through the link on the **Help** section accessed through the Left Hand Menu, or by entering the web address directly into your browser: <https://bchtraining.biodiv.org>.

You can use any existing BCH account to log in to the Training Site, using the same process as outlined above. The site is differentiated from the “official” version of the BCH with a different header bar appearing across each page.

## 9. CORE REFERENCE RECORDS



### OVERVIEW

The BCH is a relational database system and records may refer to each other. This reduces the need to duplicate entering information. Core reference records contain information that is repeated across multiple records. All users can refer to the global core reference records that are maintained by the CBD Secretariat. You can also create personal core reference records for your own use if needed.

### A. About relational databases

The BCH is a **relational database system**, which essentially means that records may be linked in a way that allows information stored in separate records to be used together. For example, the data in a record for a particular living modified organism may be referred to (or used) by several other records, such as decisions by a number of different countries on that organism and risk assessments on that organism. The living modified organism record in turn may refer to other records, such as a record for an inserted gene and contact information for an applicant.

Referring to other records greatly reduces the need to manually enter duplicative information (e.g. you can enter the contact details for a Competent National Authority only once and then simply refer to that record when registering a hundred decisions it has taken, rather than entering the contact details a hundred times – once for each decision).

### B. Nested records

Because the BCH contains records that can be interlinked with each other, new records you create can sometimes contain one or several “nested” records. For example, when creating a new record for a decision, you may also need to create a new contact record (for a new applicant) and a new Competent National Authority record.

To ensure you are actively approving all records for publishing (in the example above, submitting the new decision record for publication would also involve submitting a contact record and a Competent National Authority), a warning pop-up will display drawing your attention to the fact that multiple records will be published at the same time.

A list of additional records that are referenced will be provided (see n in the diagram below). To publish all records, select the “Submit all drafts for publishing” option (see o in the diagram below). If you are not yet ready to publish all of the records, select the “save as a draft” option.

*Figure: Screenshot of warning message when publishing multiple records*

### C. Core reference records

While most records in the BCH are searched through the database categories, a few

types of information are not used individually, but are viewed only in the context of another record. This information is stored in a **Core Reference Record** maintained either by an individual or defined user group (if the record will be used by a government, or organization) or by the BCH Administrators (if the record needs to be available for global use). Core reference records maintained by an individual or small group are considered to be in a **personal registry**, while those maintained by the BCH Administrators and accessible to all users are considered to be in a **global registry**.

The information included in either type of core record (personal or global) is made **publicly available** through the BCH if the core record is linked to any other record through viewing the linked record. The difference is that **any user** can link to a global core reference in the **global registry** when creating a record, but only the **owner** of a personal record in a **personal registry** (or a member of their authorized user group) can link to a personal record.

Example of how personal and global core reference records are made available:

*Core reference records registered by user*

Group 1 – personal registry (1 record):  
AAA

Group 2 – personal registry (2 records):  
DDD | EEE

Group 3 – personal registry (0 records):  
[no records]

BCH Administrators – global registry (3 records):  
XXX | YYY | ZZZ

*Core reference records available for user creating records*

Group 1 (4 records = 3 global + 1 personal)  
AAA | XXX | YYY | ZZZ

Group 2 (5 records = 3 global + 2 personal)  
DDD | EEE | XXX | YYY | ZZZ

Group 3 (3 records = 3 global + 0 personal)  
XXX | YYY | ZZZ

The various types of core reference are explained further below.

- ◆ **Contact details** (personal)  
Contact detail records include information about a contact point (typically a person) and coordinates (including address, telephone and email details). Most record types refer to these core references, including national contacts, decisions and declarations, risk assessments, capacity-building activities and information-sharing records.

- ◆ **Living Modified Organisms** (global or personal)  
The BCH maintains a registry of all living modified organisms that are referred to by any of the records in the databases, which includes information about the unique identifier, the introduced traits and a summary of the modification. These core records may be referred to by decisions and declarations records, and risk assessment records. Most records are included in the global LMO registry maintained by the BCH Administrators, but in some instances governments may choose to create personal LMO records – for example, to include additional information about the LMO in their national records, or if the LMO has not yet been added to the registry.
- ◆ **Gene** (global or personal)  
The BCH maintains a registry of all inserted genes that are referred to by any of the records in the databases, which includes information about the donor organism and introduced trait. Most records are included in the global gene registry maintained by the BCH Administrators, but in some instances governments may need to create a personal gene record – for example, if they are registering an LMO with a novel trait that has not previously been used in the BCH.
- ◆ **Organism** (global or personal)  
Information about organisms includes taxonomic status, common name(s) and a summary of its characteristics. Organisms are referred to in records that contain information about parental or recipient organisms, and donor organisms (living modified organism records) or relevant expertise (biosafety experts).

## 10. GENERAL PRINCIPLES FOR ENTERING RECORDS



### OVERVIEW

There is a standard layout used on all record editing pages in the Management Centre. The online editing pages reflect the common formats for reporting information.

### A. *Layout of the Record Editing Pages*

All of the record editing pages accessed through the BCH Management Centre use a standard layout.

1. **Record type:** The type of record you are editing is at the top of the page, indicated with an icon and the category of information (in the example above, a “contact” record is being edited).
2. **Tabs:** Tabs indicate if you are editing an individual record, or if you have created a nested record (in the example above, the user is editing a “contact” record, which has been created while originally working on a Biosafety Information Resource Record).
3. **Page numbers:** Page numbers appear on the top and bottom of each data entry page. Your current location is highlighted in green, and other pages are in blue. Where necessary, the data entry pages are broken into multiple pages to make editing long records more manageable.
4. **Review page:** After entering information, you must go through a “review” page, which displays the information you have entered as it will appear in the record. If you need to make any changes, select the relevant page, make the changes, then click on the review page again.
5. **Save changes:** Clicking on this button brings a pop-up screen that gives you the option of either publishing the record, or saving the record as a draft. (If you do not wish to do either of these things, press the “cancel” button.)
6. **Cancel or delete:** Clicking on this button brings a pop-up screen that gives you the option of either cancelling the changes you just made to the record while keeping the previous version of the draft (e.g. if you were editing an existing record but you decided not to make the changes after all), or deleting the record completely. (If you do not wish to do either of these things, press the “cancel” button.)
7. **Select languages:** Clicking on this button brings a pop-up screen that allows you to select in which languages you would like to provide information in the record you are editing. Tick the relevant box(es) and click “save selection” to add additional language fields to your record. (If you do not wish to make changes to the language fields, press the “cancel” button.)

### B. *Entering Data into the Common Formats*

All of the record editing pages accessed through the BCH Management Centre are based on the relevant **Common Format** for reporting information to the BCH.

1. **Section headings:** The blue shaded boxes describe the sort of information you will need to provide in each section.

2. **Field names:** The bold text is the name of the field in which you will need to provide data.

3. **Help icons:** Clicking on a help icon brings a pop-up screen that provides access to relevant online help for that section, if available.

4. **Language:** The purple shaded box next to each text field indicates the language in which information is being provided.

5. **Controlled vocabulary list:** Controlled vocabularies are indicated by grey text reading **[please specify]**. Click on the **Select** button to open a list of terms from the controlled vocabulary, highlight the relevant option and click on the **Continue** button. (If you do not wish to make or change your selection, press the “Cancel” button.)

**Note:** For very long or complex lists (e.g. taxonomic status of organisms), a search box will open up instead of a list of terms. Enter in a search word, or part thereof (your term must be at least three characters long) and click on the **Search** button to get a list of terms.

You can then click on the **[info]** link for a description of the term, or the **[search related]** link to get a list of any terms related to this in the BCH thesaurus.

To browse the whole list of available terms, click the **Show All** button.

If your term appears with the phrase **NON-PREFERRED** in red next to it you should click on the **[search related]** link and choose the preferred synonym.

If your term does not appear, click the **Specify another value** button and create a new term.

6. **Check boxes:** Short controlled vocabulary lists are sometimes displayed as check-boxes. Click the box next to the relevant terms to add or de-select the term.

7. **Other terms:** If the term of your choice is not available from a controlled vocabulary list, you will need to click on the “other” box. Select the term which most closely describes your new term (this will help in searching for your record), or choose “other” again if there is no related term. Then enter your new term and press the **Continue** button. (If you do not wish to create a new term, press the “Cancel” button.)

8. **Add a reference:** This button allows you to link to one or more other records registered with the BCH, or to create a new record with the required information. Clicking on the button opens a page with a list of available records to which you can make a link. **Select** the relevant record and click on it to link to it.

If there is no record containing the information you need, you can create it by clicking on the **Create** button. A second tab will appear on the screen and you will be able to create the new record. When you have finished entering information and saved the new record, you will return to your place in the original record.

## 11. MANAGE INFORMATION



### OVERVIEW

Use the “Manage your information” feature to edit existing records. You cannot delete a record that is being referenced by another record (e.g. a record for contact details that is being used by a Competent National Authority). You can change ownership of a record between users. You should save your work regularly as a draft (the BCH creates a background save every 5 minutes in case your connection is lost, but this is not a substitute for manual saving).

### A. *Manage Information*

Use the “Manage your information” button to access records you have previously created in the BCH.



Exercise 7: Find a record you want to edit.



### Exercise 7: Solution

1. In the main page of the Management centre, click on “Manage your information”
  - a. Or, in the address bar of your browser, type in the following:  
<https://bchdemo.biodiv.org/Pilot/Member/MyRecords.aspx>
2. In the “Information Management” page you can see the list of records you are authorized to modify or delete.
3. Click on the name of the record (in Blue) to view the details of the selected record.
4. The record details page shows some information as the record owner or the date of creation. It also presents a summary of the content of the record.

### B. *Edit Information*

Once you have opened a record, you can use the “Edit Record” function to make changes to it.



Exercise 8: To change the information contained in the selected record.





#### Exercise 8: Solution

To modify the information contained in the record, click on the “Edit record” button.

The form will appear in the same format as in Chapter “Registering Information” depending on the record category. Please refer to the according sub Chapter.

- You will receive an e-mail from [bchadmin@biodiv.org](mailto:bchadmin@biodiv.org) to confirm your request. You can always cancel the request by replying to this e-mail.

3. **Warning:** *When an Authorized User modifies a record, the modification has to be accepted by the National Focal Point.*

4. If you are a National Focal Point, the modifications are immediately accepted in the database.
5. If you are an Authorized User, the request appears now in the “Pending requests which you have submitted for validation” Section of the “Management Centre” page.



#### Exercise 9: To delete a record.



#### Exercise 9: Solution

1. To delete the selected record, click on the “Unpublish record” button
2. A warning message will ask you to acknowledge the deletion of the selected record.
3. If you are sure to delete the selected record, click on “OK”. You can always cancel the request by clicking on “Cancel”.
  - You will receive an e-mail from [bchadmin@biodiv.org](mailto:bchadmin@biodiv.org) to confirm your request. You can always cancel the request by replying to this e-mail.
4. **Warning:** When an Authorized User modifies a record, the modification has to be accepted by the National Focal Point.

If you are a National Focal Point, the modifications are immediately accepted in the database.

If you are an Authorized User, the request appears now in the “Pending requests which you have submitted for validation” Section of the “Management Centre” page.

### **C. Delete Information**

Records can be unpublished to remove them from the public database.

### **D. Unpublishing records**

Because the BCH contains records that can be interlinked with each other, a record you wish to delete can sometimes be referenced by multiple documents. For example, you may wish to delete a contact information record (used for a capacity-building project that has changed hands), but the same contact record may also be used in another project, and a biosafety information resource.

To ensure you do not inadvertently delete a record that is used in another document, a warning dialog box appears when you try to unpublish a record that is being referenced by another records, listing the record(s) that use the information you are trying to unpublish.

*Figure: Screenshot of warning received when attempting to unpublish a linked record*

### **E. Drafts and background saves**

When you are registering new information, you have the option of saving a copy of the record as a draft in **Your Records** collection. You should save drafts regularly, particularly if you are entering a lot of data, or if you do not have a very reliable internet connection.

The BCH automatically saves a temporary copy of the record you are working on every 5 minutes. Should an interruption occur, your draft will be restored to its last saved state. This feature can help you to recover work if a connection error occurs, but should not be used as a substitute for regular manual saving of the record you are working on.

Figure: Screenshot of message to advise saved record has been recovered.

## 12. USER GROUPS

### A. User groups

The BCH allows governments and organizations to form a “group” of users. Users in each group have the ability to see records for all members of the group, including draft records. This allows the group to share editing of different records owned by the government or organization.

### B. Give Ownership

Records are typically “owned” by the BCH user that created them. You may wish to change the ownership of a record in some cases, for example to transfer a record to a member of the BCH roster of experts to allow them to edit it, or if a member of your user group leaves the organization.



Exercise 10: Give ownership to a record.



Exercise 10: Solution

1. To give a record ownership, click on the “Give ownership” button.
2. A page requesting you to enter an e-mail address should appear. You should specify the email address of the BCH user to which you want transfer the ownership.

Enter the e.mail address and click continue to save the changes

You will receive an e-mail from [bchadmin@biodiv.org](mailto:bchadmin@biodiv.org) to confirm your request. You can always cancel the request by replying to this e-mail.

**Note:** If a user is not the owner of a record, he can still modify this record given he has the correct roles assigned to him (see chapter “Manage Authorized Users” below).

## 13. MANAGE AUTHORIZED USERS

**Note:** This chapter applies only to National Focal Points.



### OVERVIEW

BCH National Focal Points may nominate (or remove) additional National Authorised Users to assist them in entering information. However, the National Focal Point must still validate every record before it is made public.

### A. Authorize new user

As **BCH National Focal Point** you may nominate additional National Authorized Users to be granted the ability to register information in any or all of these information categories as appropriate. However, to ensure the authenticity of the information, you will be required to verify the accuracy of every record they create before it is made public through the BCH.



Exercise 11: Authorize a new user.



### Exercise 11: Solution

1. In the “National Authorized Users Management” page, click on the “Authorized New User” button.
2. An empty “User profile” is shown. You will have to fill the following form:  
**Warning: Some fields, marked with a red star, are mandatory. If one of these fields is empty the sign up process will ask you to fill the specific field in.**
3. Enter the email address of the new authorized user.  
**Warning: All the necessary information will be send to this email. Be sure this is a valid email address.**
4. Enter the contact details of the new authorized user.
5. You must select the role of the user you want to authorize. The most “basic” role is “National Authorized User for all records”. This role allows the user to add, edit or delete any information with the needed validation of the National Focal Point.
6. To assign this role to the new user, select “National Authorized User for all records”. It should be in blue.
7. Click on the “Add” button with the green arrow. “National Authorized User for all records” will then appear in the “selected roles” box.
8. Click on the “Save profile” button to validate the new user.

## **B. Manage Authorized Users**

The National Focal Point can authorize, edit or delete users to the BCH Central Portal. The “Authorized Users” button in the left bar, only shows to National Focal Point. By clicking on it, you can enter the national authorized user management area.

This leads you to the “National Authorized Users Management” Page where you can find the complete list of authorized users.

## **C. Edit Authorized Users**



Exercise 12: Edit an existing user.



Exercise 12: Solution

On the “National Authorized Users Management” page, click on the email link corresponding to the National Authorized User you want to edit.

The “User profile” is shown. You can now update the profile and contact details of the selected user:

**Warning:** Some fields, marked with a red star, are mandatory. If one of these fields is empty the sign up process will ask you to fill in the specific field

3. Click on the “Save profile” button to validate the changes you have made.

## **D. Delete Authorized Users**



Exercise 13: Deleting an existing user.



**Exercise 13: Solution**

1. On the “National Authorized Users Management” page, click on the “Delete user” link corresponding to the National Authorized User you want to edit.
2. A confirmation message below indicates that the profile has been successfully deleted..

## 14. VIRTUAL MAILBOX



### OVERVIEW

*Your virtual mailbox receives emails that are sent automatically by the BCH, including messages about things that need to be done to properly validate your records (e.g. update keywords).*

### A. Using the mailbox

Each BCH user has a Virtual Mailbox used to receive email notifications sent by the BCH. You should check it regularly since it contains valuable information for BCH users. (Note: The mailbox is “virtual” because it has no real email address and cannot be used to send emails.)

#### New messages

Unread email messages appear in bold under the Subject heading.

#### Reading messages

To open a message, double click on the message title in the list. After you have read a message, it will no longer appear in the list in bold.

#### Saving messages

If you would like to keep the message in your virtual mailbox (e.g. if you wish to refer to it again), click on the “Return to mailbox” button that appears below the message.

#### Deleting messages

If you would like to delete a message you are reading, click on the “Delete this message” button below. If you wish to reply to the message, you must have a valid email address. (If you do not have an email address, contact the BCH for assistance using the contact form.)

To delete a message from the mailbox list, click on the checkbox to the immediate left of the message and then click on the button below called “Delete selected items”. If you accidentally select the wrong message, you can de-select it by clicking on the checkbox a second time.

You can also delete several different messages at the same time from the mailbox list by clicking on the checkboxes to the left of the all messages you wish to delete and then clicking on Delete selected items. To delete all of your messages at once, select them by clicking the top checkbox to the immediate left of the Subject heading followed by clicking on Delete selected items.

### B. Warning messages

You may receive an automatic warning message in your virtual mailbox if you register a record that contains keyword terms that are not in the BCH controlled vocabulary. This means that this record may not be classified correctly, and will not be searchable using the BCH thesaurus. Please check the record and update the appropriate sections as soon as possible.



**Exercise 14: Visit your virtual mailbox and read the “Welcome Message”, then save it in your mailbox for later reference**



***Exercise 14: Solution***

1. Make sure you are logged in through the Management Centre to activate your Virtual Mailbox.
2. Click on the Mailbox link on the top left of the BCH page.
3. Click on the message titled “Welcome to the Biosafety Clearing-House.” After reading it, click on the “Return to mailbox” button that appears below the message to save it in your mailbox.

## 15. DOWNLOADABLE COMMON FORMATS



### OVERVIEW

*The Common Formats used to register information in the BCH can be downloaded for offline completion either as PDFs or Word documents.*

The standardized structures or **Common formats** for organizing information that are used to report information to the BCH are all available for download as either a Word document or as a PDF. This allows you to complete the information off-line. Use of these formats may be useful in cases where Internet access is unreliable or particularly costly as the forms may either be mailed to the CBD Secretariat for entry into the BCH, or they may save connection time by allowing most information to be entered off-line to be cut and pasted into the online forms through the Management Centre.

All forms can be downloaded from the Common Formats page:

<http://bch.biodiv.org/resources/commonformats.shtml>

In some cases, multiple forms may be required in order to register a single record, i.e. if the record contains a reference to information in a core reference record that has not already been registered with the BCH

For example, to complete a Decision, it may be necessary to download the **Decision** common format *plus* the **Competent National Authority** common format (if a new authority is making the decision) *plus* a **Contact Details** common format (if the contact person has not previously been registered with the BCH) *plus* a **Living Modified Organism** common format (if the organism has not previously been registered with the BCH). However, in most cases it will only be necessary to use the primary common format.