EFR Collaboration Platform

User Guide

Atos Origin

enisa
European Network
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About ENISA

The European Network and Information Security Agency (ENISA) is an EU agency created to advance the functioning of the internal market. ENISA is a centre of excellence for the European Member States and European institutions in network and information security, giving advice and recommendations and acting as a switchboard of information for good practices. Moreover, the agency facilitates contacts between the European institutions, the Member States and private business and industry actors.

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Table of Contents

Table of Figures

Introduction

This User Guide presents a step by step guide for understanding and using the EFR platform, a collaboration platform for concurrent use, implemented to facilitate the execution of the EFR Processes.

This guide should serve as a suitable guidance for users to perform the tasks they have been assigned and support them to operate on the platform correctly.

The platform is structured according to the general workflow of the EFR process and the users' platform permissions are designed in compliance to each user's specific work scope. In particular this platform supports the phases of scenario building, scenario analysis and risk assessment as well as the preparation of the final deliverable.

The purpose of the platform is to create a collaborative space where all participants who contribute to the process of assessing Emerging and Future Risks (EFR Process) can cooperate. Via the EFR collaborative platform, the different user groups coordinate their efforts to create, analyse, and assess scenarios in the face of identifiable Emerging and Future Risks.

This User Guide will first present an overview of the EFR platform by briefly depicting the different user groups, the general activity workflow, the key terminology as well as the principal pages the user will operate on. Further, the guide provides a chapter on basic document management pointing out the most essential steps the users have to take in order to process documentation with the application. , by giving an

The User Guide concludes with a more precise description of each scenario phase of the EFR Collaboration Platform presenting for each phase the involved users and introducing concisely the different roles and tasks the involved users will carry out.

The EFR Framework at a glance

The EFR framework consists of a set of core processes aimed at assessing Emerging and Future Risks. The framework builds a scenario describing the threat environment by incorporating the known characteristics of the current environment and the known or envisaged characteristics of future/emerging application or technologies. The core processes of the framework shown in are:

1. Submission of a Request
2. Scenario Building and Analysis
3. Risk Assessment
4. Risk Treatment
5. Trend Analysis
6. Information Collection
7. Information Dissemination
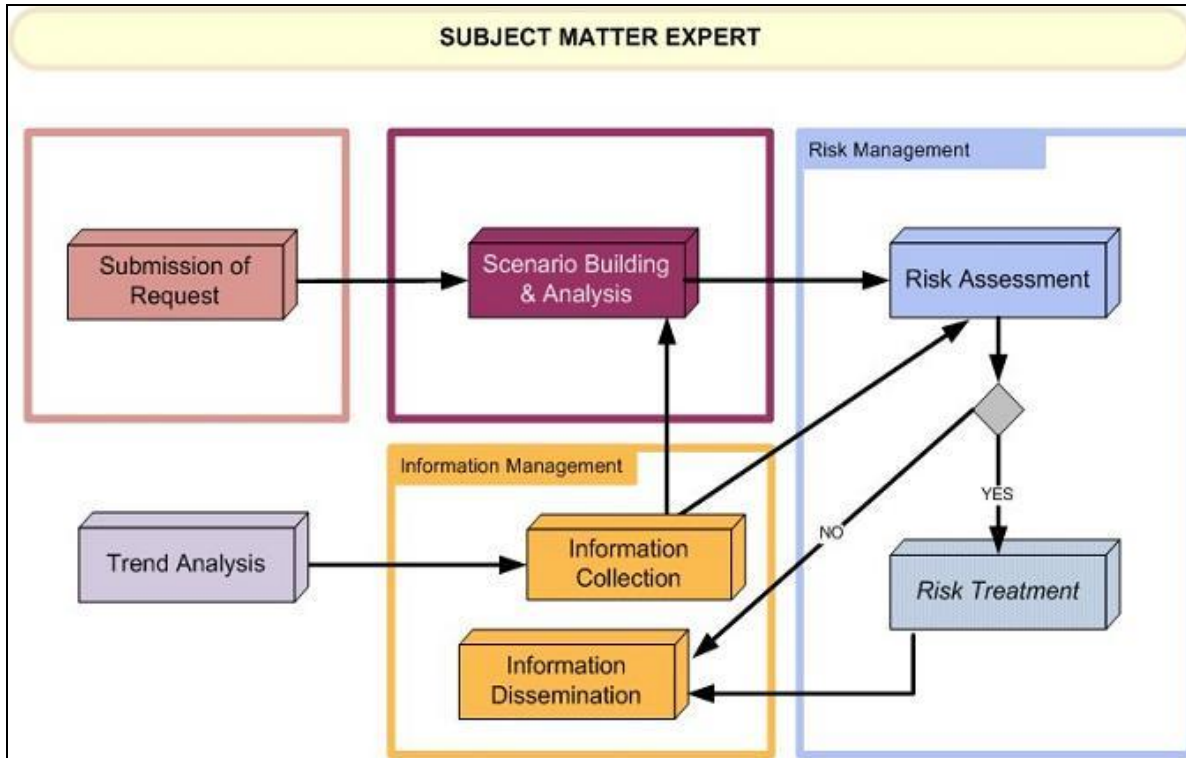
Figure 1: High level overview of the EFR process

The diagram shows the flow of the EFR process root level. The starting point would be a request submitted by the Users with the objective to assess emerging and future risks that might result from a combination of new technology and/or new applications being implemented. These requests may come from:

a) Member States considering the impact of new technology/applications and the need for introducing new or amended policy

b) The EC and other EU Institutions considering the impact of strategic IS/IT planning or considering the development/implementation of new and innovative applications or technology.

The requests need to be presented in a specific template, thus assuring that the client-specific requirements are properly formatted. These requests will be used to build scenarios. Specialised expertise required for each process depending on the request is provided with the involvement of subject matter experts.

Additionally, Subject Matter Experts would take into account information such as trend reports, the World-Wide-Web, white papers and research papers in order to develop and endorse scenarios. The trend reports are elaborated during the Trend Analysis and document relevant trends concerning emerging and future risks.

Once having built and analysed the scenario, a completed and approved scenario template will be forwarded to the Risk Assessment. On the base of the scenario template, potential

risks are identified and assessed and appropriate risk treatment decisions are afterwards produced in order to encounter the identified risks. In a final step the outcome of the evaluation would be disseminated to the target audience using a number of diverse mechanisms.[1]

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[1] Enisa: EFR Framework Handbook, Dec 2008.

Introduction to the EFR collaboration platform

The EFR collaboration platform (from now on "The Platform") aims to facilitate the usage of the EFR framework by supporting the execution of key processes and their corresponding activities. In this version the platform supports the processes of scenario building, scenario analysis and risk assessment as well as the preparation of the final deliverable. Other processes and activities for the time being will have to be carried out completely manually. As the experience with the framework grows and the users get familiar with the features of the platform it is certain that ways to increase the efficiency of the current implementation and extend support to the currently manual parts will be identified.

The purpose of the platform is to create a collaborative space where all participants who contribute to the processes of assessing Emerging and Future Risks (EFR Framework) can cooperate. The different user groups coordinate their efforts to create, analyse, and assess scenarios to reveal identifiable Emerging and Future Risks. The platform provides storage space (workspaces) to store files and facilitate sharing of information, document editing, discussion forums and workflow features that lead to the production of the EFR processes outputs (documents). Users can track what is the progress of each process and where their contribution is required. In addition the platform will sent out email notifications to alert the users on certain events (file uploaded, user contribution required, process output accepted, etc).

The outputs of each process (output documents) in many cases will use preformatted templates designed to present the contributions of the experts in a coherent format. The development of these documents is supported by a file editing workflow and document versioning. The same workflow is uniformly applied in all processes, thus experts should find few surprises once they participate in the execution of one process. In the following chapters the implementation artefacts used to realise the processes will be explained as well as the actions required by each user depending their specific roles and the progress of the process they participate.

User Roles

As per the description of the EFR processes the participants assume certain roles that frame the obligations and interaction of each individual to the execution of each process. In the case of this platform this translates to a set of permissions on objects (artefacts) of the platform that prescribe what the user is allowed to do and how the platform interacts with the user. The users of the EFR collaborative platform correspond to the following roles:

1. EFR Manager
2. EFR Specialists
3. Experts
4. EFR Stakeholder
5. EFR Administrator

According to the EFR framework, these roles represent the key actors participating in the building, analyzing, assessing and finalizing of a scenario. The main functions of each role are described below.

Please note that the described roles refer to the roles as users of the EFR platform application which is mainly focused on access control management and the assignment of tasks. For a full description of the principal actors in the EFR Framework please be referred to the EFR Framework Handbook.

EFR Specialists

The EFR Specialists are mainly responsible for the correct circulation, management and validation of the working documents. One of his tasks is to initiate the scenario building process by choosing the according scenario templates from the database. These templates serve as the starting point for the Experts.

Further, the EFR Specialists are in charge of consolidating the Experts´ contributions into one working document and uploading them to the corresponding workspaces. Please find more information about the actions of the EFR Specialist in the corresponding chapter at the end of the user guide.

Experts

This role requires significant knowledge and experience in the specific subject area considered using the EFR framework. The expertise needed may vary based on the specific requirements of the submitted requests, the technologies involved, the threat environment or the type of risks being identified or assessed.

The Experts tasks include creation of scenarios and analysis, contribute new document versions or add comments to existing scenarios. They are responsible for uploading their documents to the platform and share them with other experts. Additionally, they have the possibility to participate for instance in a blog of building discussions with the mean to interchange positions or opinions and enrich the process. This role is typically recruited for particular assignments called in an ad-hoc basis. Thus, it is not a stable entity.

There are different *types of Experts* depending on the sub-workspaces they are working in:

1. Building: Building Matter Experts

                              Building Validation Matter Experts

2. Analysis: Analysis Matter Experts

                              Analysis Matter Experts

3. Assessment: Assessment Matter Experts

                              Assessment Validation Matter Experts

4. Finalization: Finalisation Matter Experts

EFR Manager

The EFR Manager ensures the smooth operation and quality of the entire process by reviewing and evaluating the most relevant aspects of the EFR application. Apart from the overall controlling and supervising functions, his main tasks are to examine as well as to (dis)approve the scenarios created by the different Expert groups.

EFR Stakeholders

The EFR Stakeholders form part of the EFR Stakeholder Forum, a stable entity composed by highly experienced experts in information risk assessment and management, emerging and future risks, emerging technologies. They review the generated EFR scenarios, give advisory services on issues of their expertise and have the opportunity to comment and provide their feedback in a specific dialogue workspace. The role of the EFR Stakeholder Forum is mainly advisory and ensures regular revisions and evaluations of relevant aspects of the entire EFR infrastructure.

EFR Administrator

Note that the EFR Administrator will not actively participate during the document workflow which will be the main focus in this chapter. For this reason, the actions of the EFR Administrator will not be described during the course of the different scenario phases, but are presented in a separate section at the end of this chapter (section 12.6).

EFR Process implementation deviations

What should this chapter contain? Which kind of information should be added here?

The general activity workflow
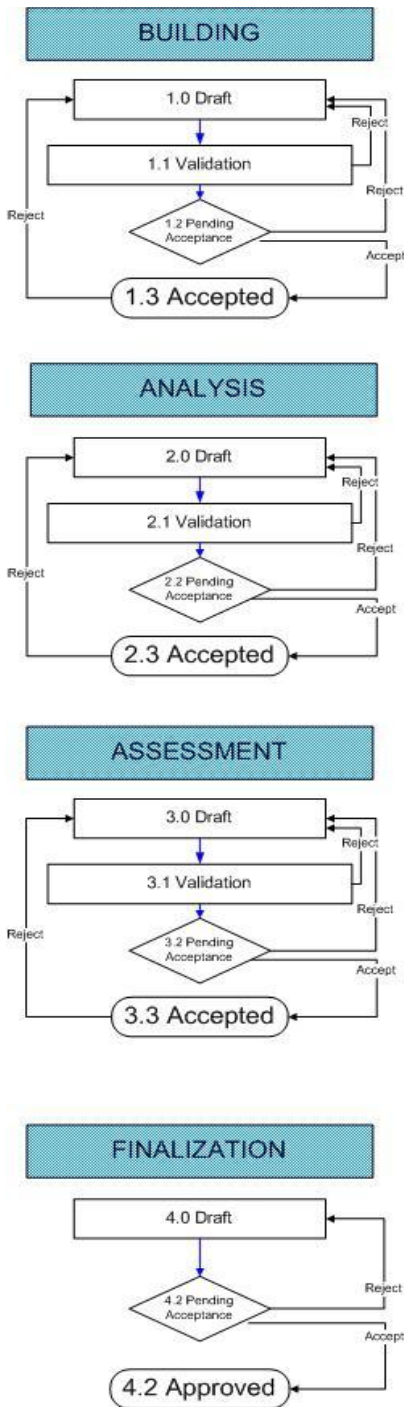
Figure 2: Overview scenario phases

Scenario phases of the EFR infrastructure

The scenarios that each user will be working with are composed of different phases which are represented by the top phase folder of the platform structure. These phases represent the subsequent steps necessary to carry out the key principals of the EFR process. The four phases of the process are:

1. Building

2. Analysis

3. Assessment

4. Finalisation

Whenever one phase is finalized, the EFR Collaboration Platform automatically opens the next phase. When all working documents are stored in the "Accepted" folder of the workspace the phase is considered to be finalised. At this moment, the system automatically opens the subsequent phase and the work in this phase can start.

In exceptional cases, the opening of a new phase can also be carried out manually even though the previous phase has not been finalised yet. This rather extraordinary action can only be carried out by the EFR Manager and the EFR Specialists. They are equipped with the specific permissions to manually open the next phase.

In both cases the users know at all times at which point of the workflow a specific scenario is in. The drop down menu of each scenario on the left hand side of the application will only open up to the workspace in which the users are currently working in. This means for instance that the users cannot open the Finalization phase if the process is still in the Analysis phase. Even more, the Finalisation workspace button to click on does not appear in the navigator menu until the Assessment phase has not been started yet.

Workspaces and sub-workspaces

Each of the four phases represents a workspace. The workspaces are, except of the last workspace "Finalization", divided into four sub-workspaces or steps. The sub-workspaces of all phases are:

1. Draft
2. Validation
3. Pending acceptance
4. Accepted

The workspace "Finalization" is composed of only three sub-workspaces – Draft, Pending acceptance and Approved. The sub-workspaces contain the templates, working documents and contributions which is the basic working material for the different users. More details about the different document types will follow in section Nomenclature.

The Drafting Step

During this step, the EFR Specialists copy a scenario template document from the "Administration/templates" workspace to the "Draft" workspace. At this moment, the appropriate Experts of this phase download these templates from the draft sub-workspace and start working with them.

The Experts upload their contributions they have been working on to the top phase folder (these are the main workspaces of the phases – Building, Analysis, Assessment, Finalisation). The contributions can either be based on the templates or are edited as new documents. The EFR Specialists are now able to consolidate the different expert contributions to a working document. This working document is then stored in the "Validation" folder.

The Validation Step

The document validation starts as soon as the EFR Specialists store a working document in this sub-workspace. At this point, the Validation Experts will be able to work with the working document and upload contributions for this document to the top phase folder. Based on these contributions the EFR Specialists compose a working document and store it in the "Pending Acceptance" sub-workspace.

The Pending Acceptance Step

In this sub-workspace, the EFR Manager is in charge of evaluating the working document which he can accept or reject. In the case of acceptance, the working document will pass on to the next sub-workspace "Accepted". In the case of rejection the working document is send back to "Draft" for refinement or new edition.

The Accepted Step

The last step of each phase is the "Accepted" folder. Here, the final versions of the working documents are stored and ready to pass on to the next phase of the EFR process.

This is the procedure for all phases of the EFR infrastructure. After the document is stored in the "Accepted" sub-workspace the EFR Specialists start the next phase by retrieving the corresponding template from the folder Administration/templates/phase. The process will start again as described before.

Depending on the role the user is performing, the administrator has granted specific permission rights to each user allowing him to access the different workspaces in order to be able to cope with the tasks he has been assigned to.

It has to be taken into account that the access to the different phases depends on the current working state of the workflow. In other words, the user is not able to access for example the fourth phase "Finalisation" if the current work on the scenario is still in the "Building" phase. This implies that the working process needs to be performed in subsequent steps.

Permissions

The users are equipped with different permission rights defining their access to the workspaces and their scope of actions within the workspaces. These permissions are granted by the EFR Administrator.

All participants have access and reading permissions for those folders they are supposed to work in. The different Expert Groups, for instance, can upload their contributions to the workspace they are assigned to. They have owner permissions, which mean they can make changes/updates in their own documents.

Additionally, EFR Manager and EFR Specialists have permissions to open the subsequent phase manually even though the previous phase is still active. For example, in an exceptional case, they could open the Analysis phase although the Building phase is still in working process (See detailed information in section "Actions of EFR Manager").

Implementation artefacts

The EFR collaboration platform has been implemented using the Alfresco Enterprise Content Management System. The system was accordingly adapted and customized in order to meet the criteria required for the implementation of the platform.

Alfresco document management features provide organizations with all the services necessary for creating, converting, managing, and sharing electronic documents. Built on industry-standard open-source platforms, Alfresco provides version management, search capabilities, and visualization showing relationships and dependencies. Alfresco collaboration features provide the infrastructure, integration points, and tools required for accessing, sharing, and distributing content among users.[2] As such some of the terminology used in alfresco is inevitably visible by the users.

In the following section we introduce the key terminology of the EFR Collaboration Platform.

Key terminology of the platform
The following terms form part of the platform's key terminology:

- Workspaces

- Phase

- Step

- Discussion Forum

- Email notification

Workspaces
According to the Alfresco system "Workspace" is the term used to define the folder where the platform documents are stored:

"An Alfresco space is a folder with additional properties such as business rules and security. Similar to a folder, a space can hold sub-spaces and any type of content."[3]
Workspaces and sub-workspaces are used to provide the tree structure where documents are stored depending on their type, process (phase) relevance, or workflow step.

Phase / Process workspace
A phase is a workspace that used to hold the documents specific to an EFR process. The phases of the EFR collaborative platform are corresponding to the supported EFR processes: 1.Building, 2.Analysis, 3.Assessment and 4.Finalisation. For example the "1.Building" phase is where we can find all the documents relevant to the "Scenario Building" process of the EFR framework. Exception to this rules are the "External Information Document" type, these documents are to be stored in their own workspace, the "Scenario Knowledge" workspace regardless of their relevance to a specific phase.

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2 More detailed information on Alfresco: Shariff, Munwar Alfresco. Enterprise Content Management, Packt Publishing, Birmingham, 2006, or www.alfresco.com
[3] See Shariff, Munwar: Alfresco. Enterprise Content Management, Packt Publishing, Birmingham, 2006, p. 63.

Apart from documents inside a phase workspace are located discussion forums and the editing workflow sub-workspaces (Steps).

Step

As already discussed the output of each phase/process is a set of output documents. These documents are built inside the file editing workflow that consists of the following steps: Draft, Validation, Pending Acceptance, and Accepted. The Step sub-workspace is the representation of the workflow step and contains the "working documents" that have reached the certain step of the workflow. Depending on the Step different actions are possible on the documents by different users (EFR Specialist and Managers) and other users are required to complete specific actions (Contribute to the content, Validate content, Approve content)

Note: the last phase "Finalisation" represents an exception in the sense that it is just composed of three steps: Drafting, Pending Acceptance, and Accepted.

Discussion forums

The platform provides a special type of spaces called "Discussion forums" for collaboration. A forum is essentially a space composed of a number of member-written topics. Each topic entails a discussion or conversation in the form of a series of member-written replies. These topics remain saved on the website for future reading indefinitely or until deletion by a moderator.[4]

The discussion forums are the best place to share thoughts, ideas or comments about certain scenarios, documents etc.

Using the collaborative forums, the author of a document can invite others to work on the document and participate in the general discussions about the document.

Email notification

Email notification is a powerful feature where people can be notified immediately on certain events of the platform based on their assigned roles.

In particular users will be notified when documents are added to a workspace and the users' contributions, comments or specific actions are expected. Further, email notifications will be sent out to the concerned users when new documents have been uploaded or modified. Please find detailed descriptions of all email notifications in Annex I and III.

Document types

Throughout all phases the users will work with different types of documents:

- Templates Documents
- Contributions documents
- Working documents
- External information documents
- Output Documents

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[4] See ibid, Alfresco. Enterprise Content Management, p.265.

Templates

Templates are the starting point for preparing the output required by the execution of a process/phase. A Template can be an empty document, a specially structured document, the output document of the previous phase or older scenarios prepared in the past. For convenience and coherence "Templates" should be collected in the workspace "0.1.Templates". Once a template is copied in one of the steps of a phase workflow it is then a "Working document" and not a "Template" anymore. There can be a number of templates for each phase and only some of them may need or be selected for use. Uploading Template files and using them as working files is an action available only to the EFR Specialist.

Contribution Document

These documents are stored in the top phase folder (1.Building, 2.Analysis, 3. Assessment, 4.Finalisation). They contain the Experts' contributions on the basis of the scenario templates. As such the experts must download the latest version of the working document the wish to contribute to and include their contribution. Then the expert has to name the contribution file according to the guidance given below on naming conventions and upload it to the top phase folder. Note that document versioning is not automatically enabled for contribution documents, thus following the guidance on naming convention is important.

Working documents

The working documents are the consolidated version of the different expert contributions. These documents are consolidated by the EFR Specialist and always include the term "scenario" in the file name. Working documents follow the structure of the platform folders and indicate the status the process is currently in.

Please note that there can be any number of working documents for each phase and the overall process is only considered to be finished when all working document are accepted as output documents.

Note: It is required that working documents contain the word "scenario" in their name.

Guidance on document naming conventions

The table below describes the nomenclature of the different document types. Please note that the enumeration of the contribution and working documents should be identical to the template number they are based on:

Phase	Template name	Contribution document	Working document
Building	01-template-Building.doc	01-<exp_username>-Building_<ss>.doc	01-scenario-Building.doc
Analysis	01-template-Analysis.doc	01--<exp_username>-analysis_<ss>.doc	01-scenario-analysis.doc
Assessment	01-template-assessment.doc 02-template-assessment.<ext>	01-<exp_username>-assessment_<ss>.doc 02-<exp_username>-assessment_<ss>.doc	01-scenario-assessment.doc 02-scenario-assessment.doc
Finalisation	01-template-finalisation.doc 02-template-	01-<exp_username>-finalisation_<ss>.doc 02-<exp_username>-	01-scenario-finalisation.doc 02-scenario-

	finalisation.doc	finalisation_<ss>.doc	finalisation.doc
<ss> representes a two digit serial number that needs to be incremented on every new contribution of the expert corresponding to the same Working document (01,02,3,..,etc).			

Figure 3: Documents naming convention

Output Documents

When a phase is completed, one or more output documents will describe the results of the specific phase. These documents will be used as inputs to a next phase. In the last phase Finalisation the phase output documents are the result (Final deliverable) of the entire scenario workflow.

Note: A phase cannot be dimmed complete if there are working documents left in any step of the workflow.

External Information Document

These documents do not form part of a specific phase and they do not represent a specific step within the workflow. They can be documents found in the web or reports of an organisation relevant to the scenario. This is a type of document with additional information on a certain topic which might be of interest for the participating users and relevant to the scenario. These documents must be stored in the "Scenarioknowledge" workspace.

Document Versioning and History

The control of the distinct versions of the "Working Documents" uploaded to the systems is performed automatically by Alfresco. This means that whenever a working document changes in the system (that is, whenever you upload it), Alfresco automatically replaces the previous document with the new one and generates an internal copy of the previous document, called a version of the document. This copy may be accessed by the user at a later point in time (subject to their corresponding access rights), by accessing the version control feature of Alfresco. This allows the user to recover previous versions of the document at any time.

Alfresco provides the option to specify whether the uploaded document includes minor or major changes and it allows the user to add notes to the document versions in order to maintain a brief change history.

Scenario Phases and workspace structure

The following section describes the workspace structure of the EFR Collaboration platform as it is presented by the application.

The basic structure principal can be illustrated in the screenshot below:

Figure 4: Workspace structure
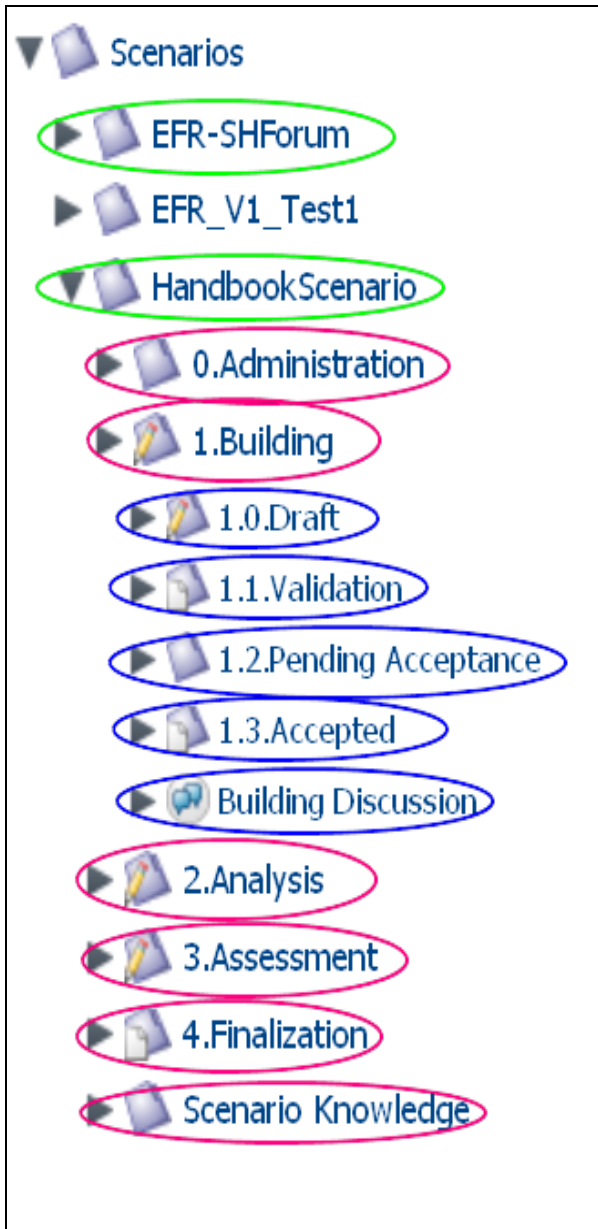
The green circle represents the structure level where the different scenarios are stored. In our example the name of this workspace is "Handbook Scenario". Please note that there is no possibility to store, upload or edit any documents in this workspace. The EFR-SHForum workspace is equally located on the same structure level than the different scenarios.

Each scenario comprises six main workspaces or top phase folders which represent the different scenario phases of the EFR process and additional information folders (red circles).

The main phases of a scenario are:

1. Building

2. Analysis

3. Assessment

4. Finalisation

Additional workspaces of this structure level are the 0.Administration and the Scenario Knowledge workspace.

By clicking on the arrow symbol next to the phases, each phase unfolds and displays the different steps necessary in order to forward a document to the next workflow phase. Each phase consists of the five sub-workspaces represented in the screenshot by the blue circles. As described previously, all working documents of the scenario need to pass through the steps Draft, Validation, Pending Acceptance and Accepted before the phase is considered to be finalised (blue circles).

The Building phase

This first phase of the EFR workflow has at its aim to generate relevant and valid scenarios.

All user groups will be involved in the "Building" workspace with the construction, evaluation and approval of valid scenarios. The involved users are namely the EFR Specialists, Building Matter Experts, Building Validation Matter Experts, the EFR Manager and the EFR Stakeholders.

According to the general activity workflow previously described the Building workspace (1. Building) is composed of the following sub-workspaces (green circle):
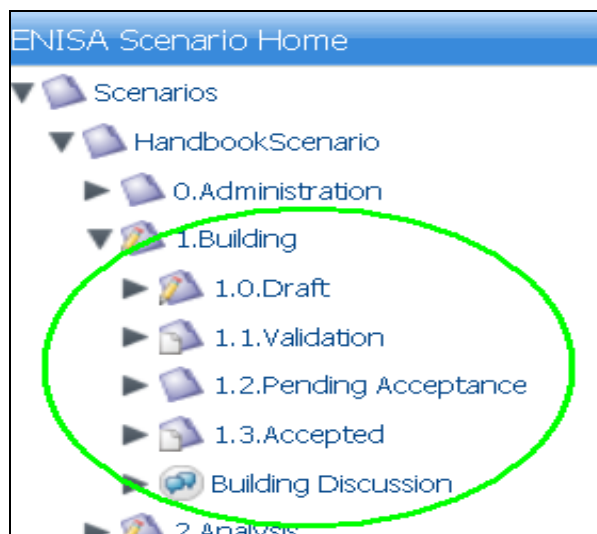
Figure 5: Building workspace

The working documents pass through all sub-workspaces and are at the end of the phase stored by the EFR Manager in the 1.3Accepted folder. Once every working document is stored in 1.3Accepted, the phase is considered to be finalised. The "Phase Output Documents" contain the results of the Building workspace and will pass on as input to the Analysis workspace. As soon as all working documents are in the Accepted sub-workspace all other sub-workspaces will then be blocked for any interaction by the users.

The Analysis phase

The objective of this part is to analyse the outcomes of the previous "Building" phase which purpose was the construction, evaluation and approval of valid scenarios. The involved users of the Analysis phase are namely the EFR Specialists, Analysis Matter Experts, Analysis Validation Matter Experts, the EFR Manager and the EFR Stakeholders. After having achieved stable and validated scenario versions from the previous phase, the experts of this phase analyse the scenarios in cooperation with the other users.

The actions performed during the different phases are identical. They all follow the same pattern which consists in forwarding the working documents to the "Accepted subfolder of the according phase" which concludes with the opening of the next phase.

The main distinction consists in the involvement of different groups of Experts (Analysis Matter Experts and the Analysis Validation Matter Experts) specialized in the analysis of

scenarios. Furthermore, the participants of this phase have the chance to exchange opinions in the "Analysis discussion blog".

According to the general activity workflow described in chapter 4, the "Analysis" (2.Analysis) workspace is composed of the following sub-workspaces (green circle):
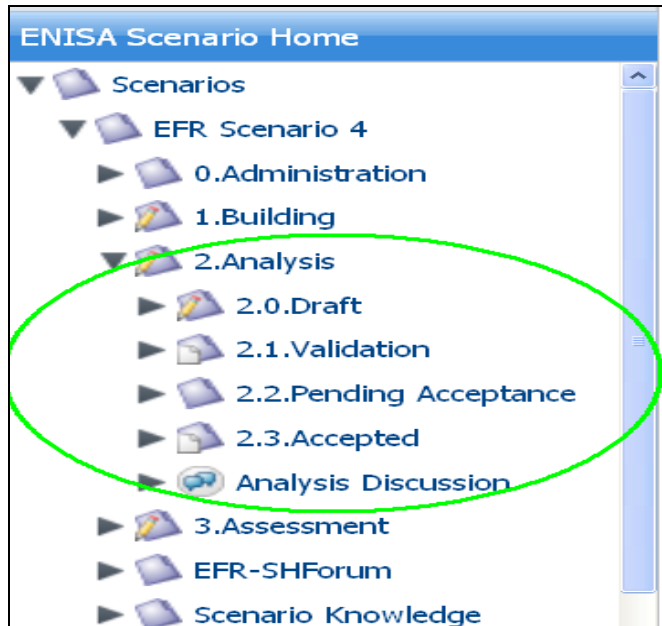
Figure 6: Analysis workspace

The Analysis phase finalises when all working documents have been accepted by the EFR Manager. These final "Phase Output Documents" contain the results of the Analysis workspace and will pass on as input to the Assessment workspace. As soon as all working documents are in the 2.3Accepted sub-workspace all other sub-workspaces will then be blocked for any interaction by the users.

The Assessment phase

The primary purpose of the scenario generation is to create valid scenarios to facilitate the assessment of emerging and future risks. The risk assessment process utilises the generated scenarios to identify relevant assets, threats and vulnerabilities relevant to each scenario in order to analyse potential risks. The Scenario Assessment phase is structured as presented in the screenshot below:
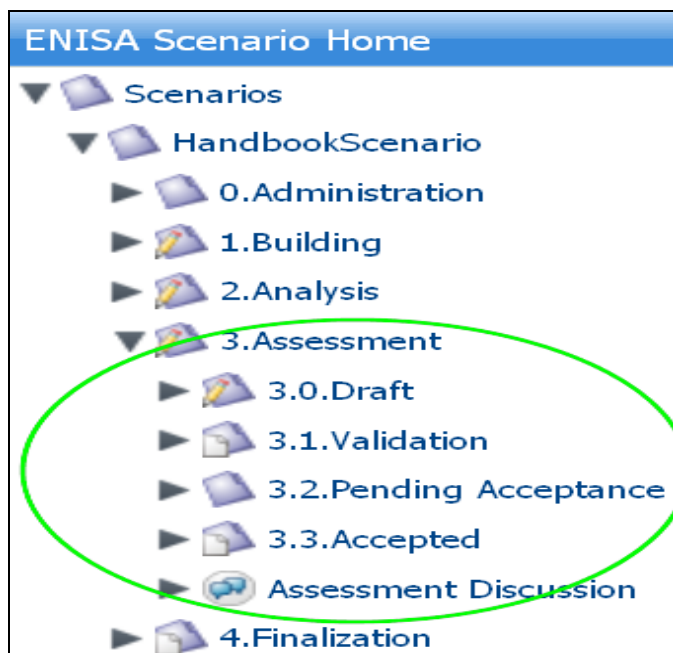
Figure 7: Assessment workspace

During this phase Assessment Matter Experts and Assessment Validation Matter Experts will form the group in charge of identifying and assessing risks relevant to the scenarios which have been previously analysed.

Similar to the other phases, the Assessment phase provides an Assessment Discussion workspace in order to exchange opinions on the Assessment of the scenarios.

When the EFR Manager accepts all working documents, the next phase "Finalisation" will be opened automatically.

The Finalisation phase

The last phase of the scenario workflow is the Finalisation phase. After having built, analysed and assessed the scenario, the process needs to be finalised during this phase. This phase is structured as follows:
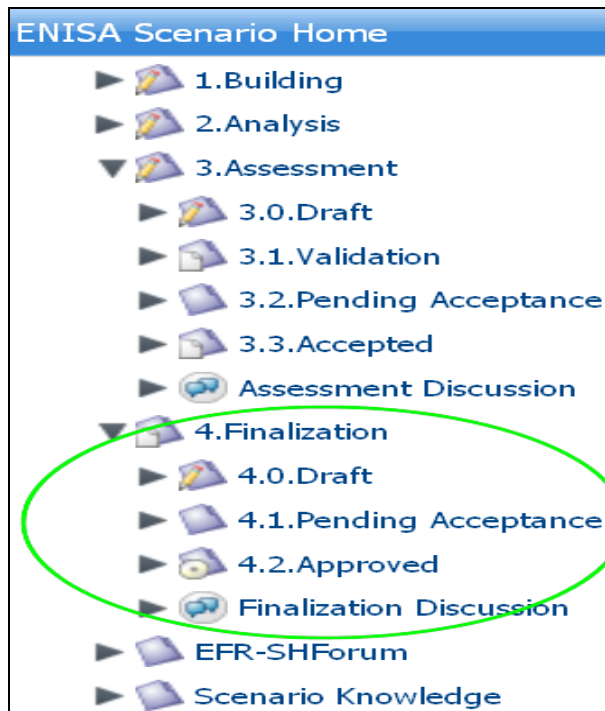
Figure 8: Finalisation workspace

The main difference to the previous phases is that the step "Validation" is not carried out during this last phase. The Finalisation phase is considered to be the final revision and approval of the generated and validated scenarios. At this point of the process there is no special Validation Expert group required since the scenarios have already been validated during the previous steps. The only Experts involved are the Finalisation Matter Experts.

This workspaces stores the results achieved from the assessment of the scenarios. As soon as all working documents are stored in the 4.2Approved folder of the Finalisation workspace the scenario is considered to be finalised. At the end of the workflow all finalised scenarios are stored by the EFR Administrator in a specific repository folder.

The User Interface

Login in the system

The user enters the platform via the website: <mark>http: domain pending to be defined by ENISA</mark>

Figure 9: Enisa Login

The users receive an invitation email from Enisa inviting them to join the EFR Framework application.

They are asked to log-in with their personal credentials sent to them by the platform administrator.

Screen layout

The layout of the EFR Collaboration Platform screen is composed of various parts. A typical platform page is shown in the screenshot below. In this example, the user entered the workspace Building using the navigator on the left area of the screen. Let us examine various sections of the site's layout.
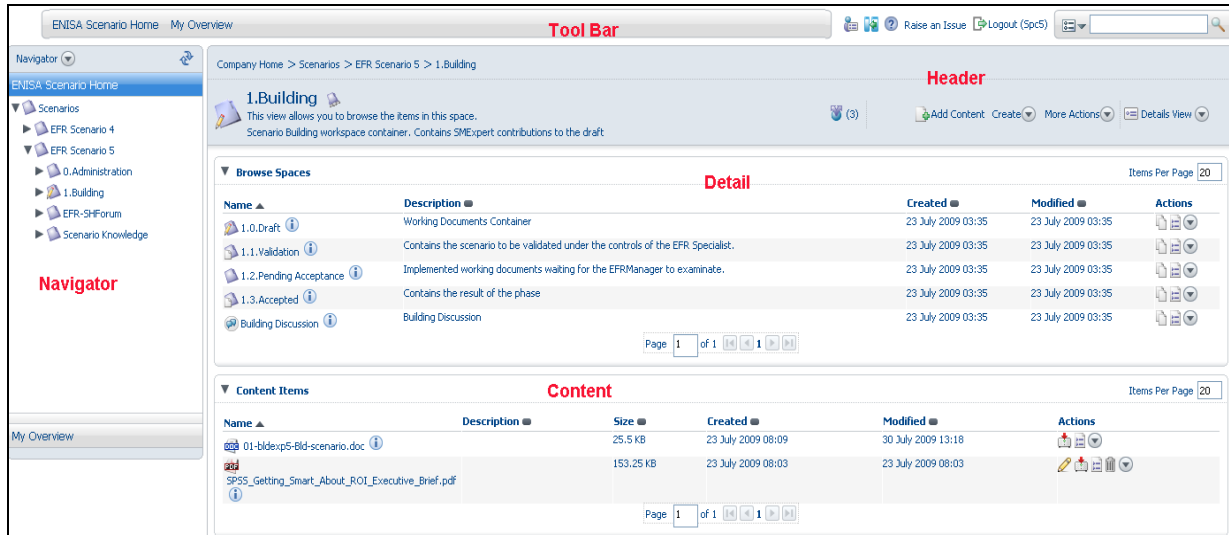
Figure 10: Screen layout

The Tool Bar

The Tool Bar on top of the page provides the following information:

- The user can browse through the platform by clicking on the links to the two main spaces "Enisa Scenario Home" and "My Overview" provided at the top.

- Administration Console icon to perform system administration functions

- User Options icon to change your options and settings

- Help button to launch online help of the alfresco system

- Raise an Issue link to submit bug reports to Alfresco

- Login and logout options

- Search box with basic and advanced search options

Navigator

The navigator on the left area of the screen is a useful tool to browse to the different spaces of the platform. The user can go to a specific space with one click and the detail and content of this space are displayed in the main area of the screen. The navigator always indicates the user in which space of the platform he is currently browsing.

Header

The header screen provides information about the current space, options to create content, menu actions to manage content, and options to use various views to display the information in the current space.

<u>Detail and content</u>

The main area of the site provides information about the sub-spaces and content that is part of the current space. You can click on the icon or title of a space or content item in the detail screen to access the information. Actions are listed as icons for each space or content. Additional action items will be listed if you click on the double-arrow icon.

User Tools

The menu of the platform is kept simple and user friendly, providing two main menu items once the user has entered:

- "My Overview"
- "Enisa Scenario-Home"

My Overview

The main page "My Overview" is the starting page for every user. The page displays the following main components:

- My task list
- My spaces list
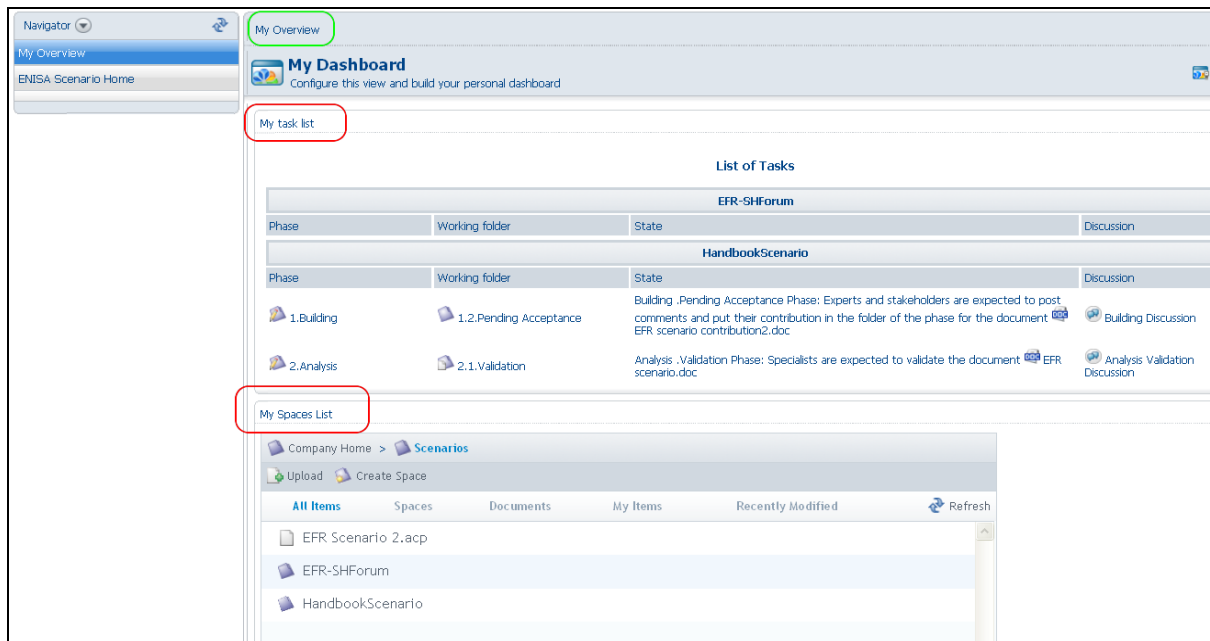
Figure 11: Layout "My Overview"

These items allow the user to see at one glance the tasks he is assigned to and the workspaces he is involved in.

The following section takes a closer look at these important components of the "My Overview" page.

My task list

The "My task list" is a very important tool for the user and serves him as the main point of reference. The "My tasks list" is a personalized list presenting all pending tasks the user needs to accomplish and presents an essential tool to track the progress of a scenario:
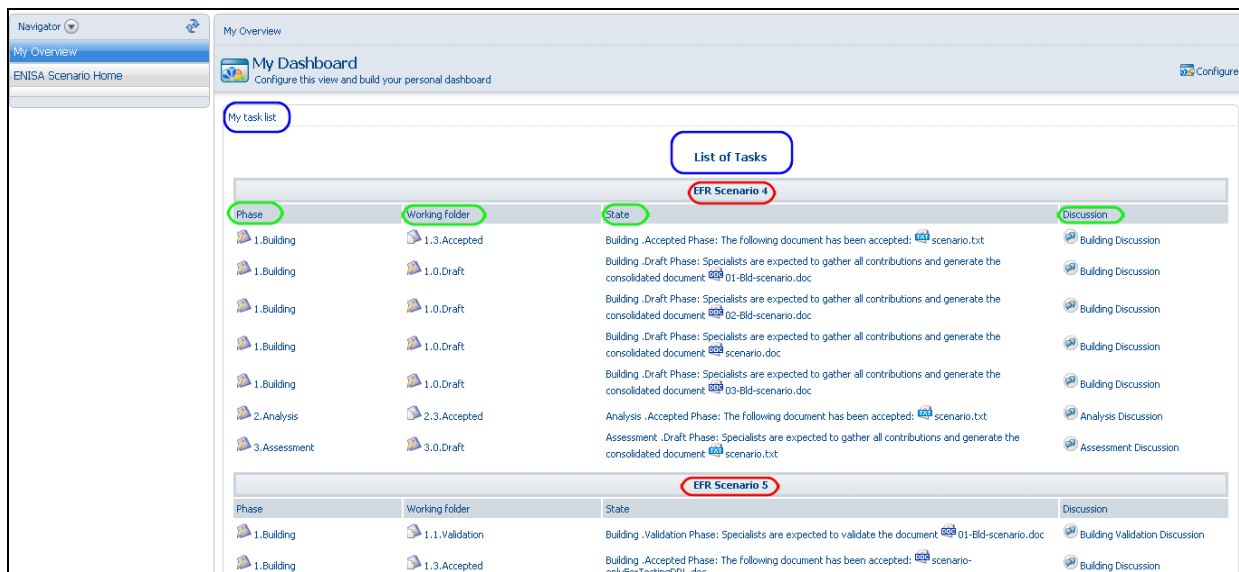
Figure 12: "My task list"

To begin with the pending tasks are organised according to the scenario they belong to. In our example this would be EFR Scenario 4 and EFR Scenario 5 (Figure12, red circles). Within the scenario, the list is split up in four columns:

- **Phase:** This column indicates the scenario phase in which the document is currently stored.

- **Working folder:** This column specifies the step sub-workspace in which the working document is currently stored.

- **State:** This column informs more explicitly about the actual tasks the user is assigned to. For example: "Building Draft phase Specialist are expected to gather all contributions and generate the consolidated document 📄 02Bld-scenario.doc"

  By clicking on the link of the document file (e.g.: 02Bld-scenario.doc) the user can directly download the document without having to navigate to the according workspace.

- **Discussion:** This column informs about the discussion workspaces the user can participate

Please note that every user will additionally be informed via automatically generated email notifications reminding him/her of each pending task he needs to cope with.

My spaces list

The "My Spaces List" is a tool enabling the user to navigate through the different workspaces of the EFR platform. This tool works in accordance with the user's access permission and therefore enables the user to access and view only those items he has permission for.

In comparison to the platform navigator (see below section ENISA Navigator) the "My Spaces List" provides a direct access to all items the user is involved in. By using the "My Spaces list", the user does not necessarily need to know in which exact workspace the document is stored he would like to access, he just clicks on the icons of the list and will be automatically forwarded to the space or the document.

Whereas using the navigator, the user would need to know more precisely in which workspace the document is stored or he would need to navigate through the different spaces until he finds the according item.

The "My Spaces List" is composed of (Figure 13):

- All Items: This view displays workspaces and documents.

- Spaces: This view displays just the spaces related to the user.

- Documents: This view shows only the documents associated to the user's workspaces.

- My Items: This view presents the items of which the user is the editor/owner. These items are created by the user.

- Recently Modified: It reveals recently modified documents or workspaces.
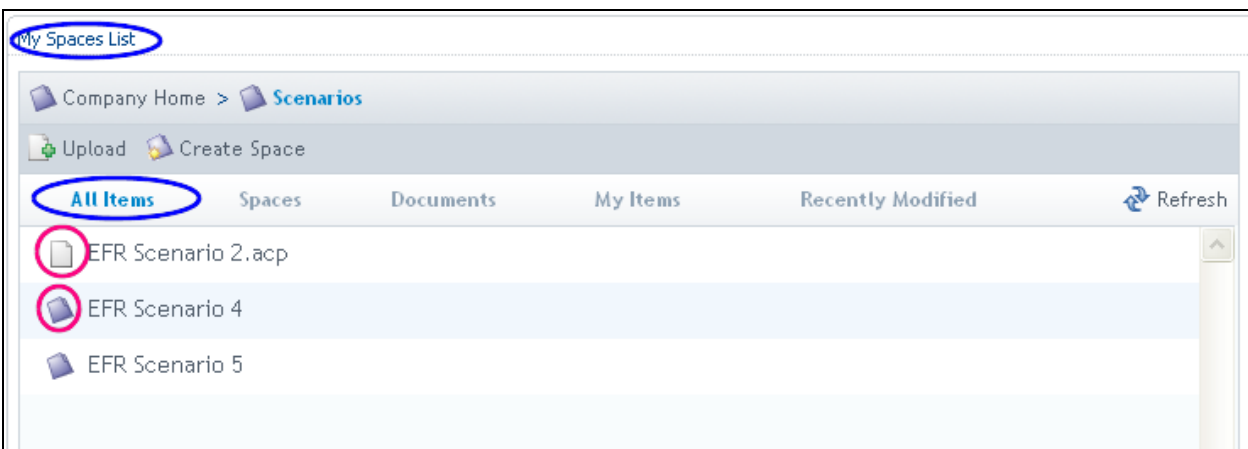
Figure 13: "My spaces" – All items

The system allows the user to navigate in different ways through this component:

- The user can click on the space icon (Figure 14, blue folder image EFR Scenario 4) and access directly the content of the space.

- The user can point at the blue box and a small drop-down display will appear below the document offering the items meta data and further options. The element chosen can be a document or a workspace.

If the element selected is a document [ ] a drop-down display will appear below the document title with several options and a preview of the document.

The options the user will find are the following:

- Check Out

- Edit Details (regarding the properties of the documents).

- Update (possibility to update a document allowing the user to upload a document and store it under the same name as the original document)

- View Content which is a link to download the document. For closing this extra-window the user should click again into the blue box.

- Delete
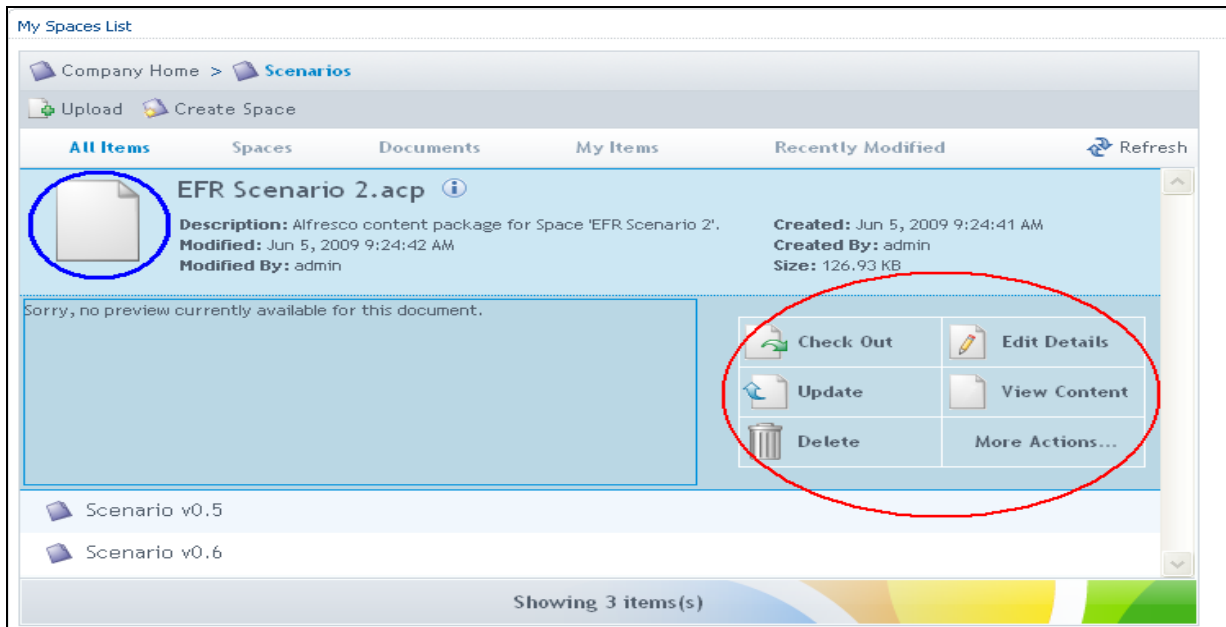
Figure 14: "My Spaces List" - All items - Document

If the element selected is a workspace a small window will appear disclosing three options:

- Edit Details: An explorer new tag is opened. Here, the properties of the workspace can be edited (Name, Description,..)

- Delete: The user can delete the selected workspace and the related sub-spaces and documents.

- More Actions: This option button will open a new tab disclosing the document's view properties. This option allows the user to configure and change the specifications for this document, as well as to apply actions to it.
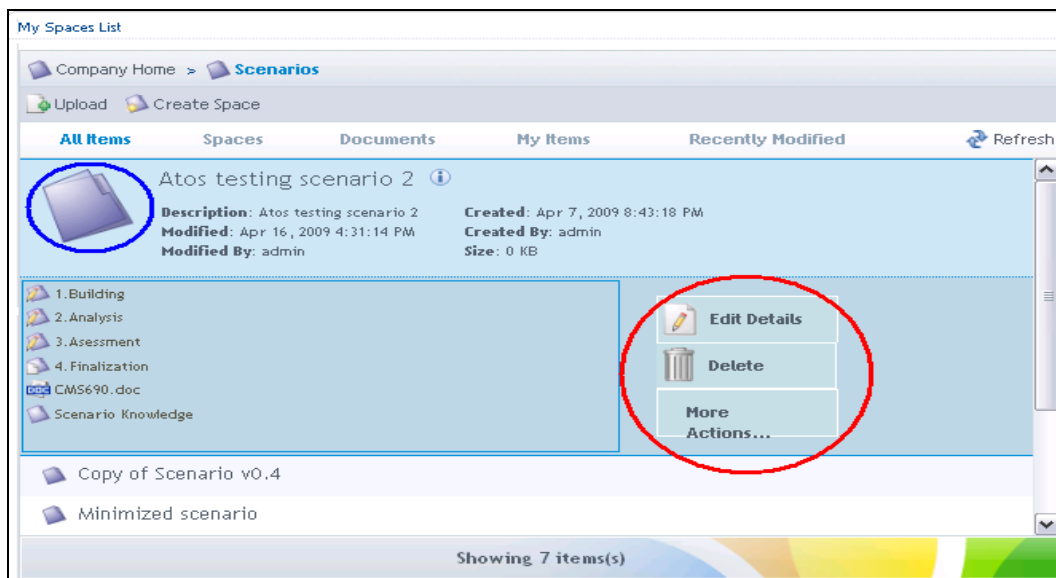
Figure 15: "My Spaces List" - All items – Workspace

The Navigator and ENISA Scenario Home

The ENISA Scenario Home page presents the actual working and collaboration area of the EFR infrastructure. On the page "ENISA Scenario-Home" the user can find the different scenarios he is currently involved in. Each scenario is composed of the above mentioned four phases where the different user groups will be collaborating.

The phases can easily be selected by using the navigator on the left hand side of the interface. By clicking on the arrow next to "Scenarios" a drop down menus will unfold with the existing scenarios. The user can choose the scenario he wants to work with by clicking on the arrow.

Again, a drop down menu will display the different phases of this specific scenario. By this means the user can navigate through the different phases of different scenarios and the contents will be displayed on the right hand side of the screen.
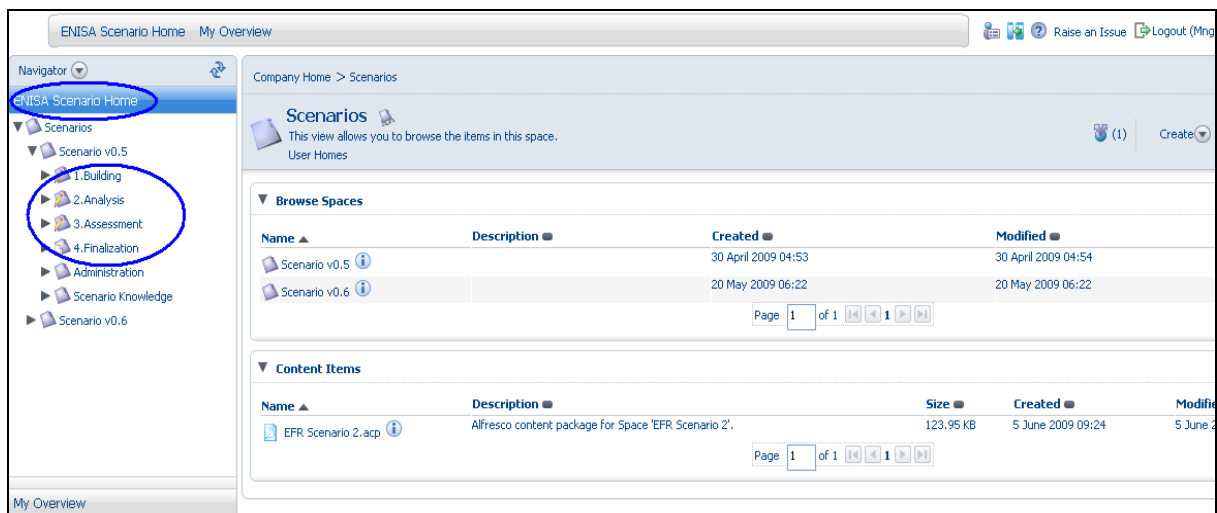
Figure 16: Navigator and ENISA Scenario Home

Working with documents

This section deals with the basic document management features such as:[5]

- Uploading a document

- Downloading a document

- Editing a document

- File Properties and File History

---

[5] Note that this section is based in most parts on the Alfresco User Manual: Shariff, Munwar Alfresco. Enterprise Content Management, Packt Publishing, Birmingham, 2006 or www.alfresco.com.

Upload a document

The screenshot below presents an example of the main document management features of the platform. Please note that the layout and components can be slightly different depending on the specific user access rights. If the user is not equipped with certain permissions, the corresponding icon will not appear in the interface. For example, if the user does not have edit rights in a specific phase, the icon "Edit" (pencil) will not appear in the interface.
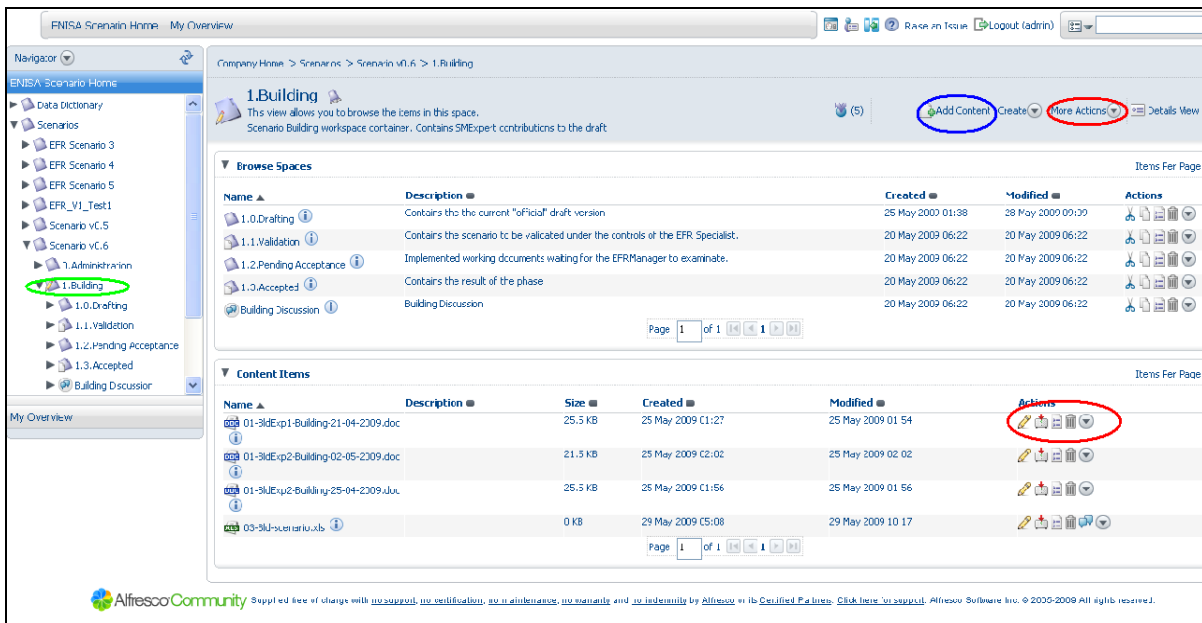
Figure 17: Basic document management – Upload document

In order to upload a document, the user has first to enter the workspace he would like to work in (Figure 17: in our example marked with the green circle). The user can either navigate to this file by using the navigator on the left hand side or he could access directly from "My Overview – My task list" to the corresponding workspace.

In "My task list", the user clicks on the pending task he needs to accomplish and will automatically be forwarded to the workspace the document belongs to.

Once entered the workspace, the user can upload content from his hard drive into a workspace following the steps given below:

1. In the space header, click the Add Content link (blue circle).

2. The Add Content dialog appears.

3. To specify the file that you want to upload, click Browse. In the File Upload dialog box, browse to the file that you want to upload. Click Open. Alfresco inserts the full path name of the selected file in the Location text box.

4. Click the OK button to upload the file from your hard disk to the EFR platform repository. A message informs you that your upload was successful as shown in Figure 20:
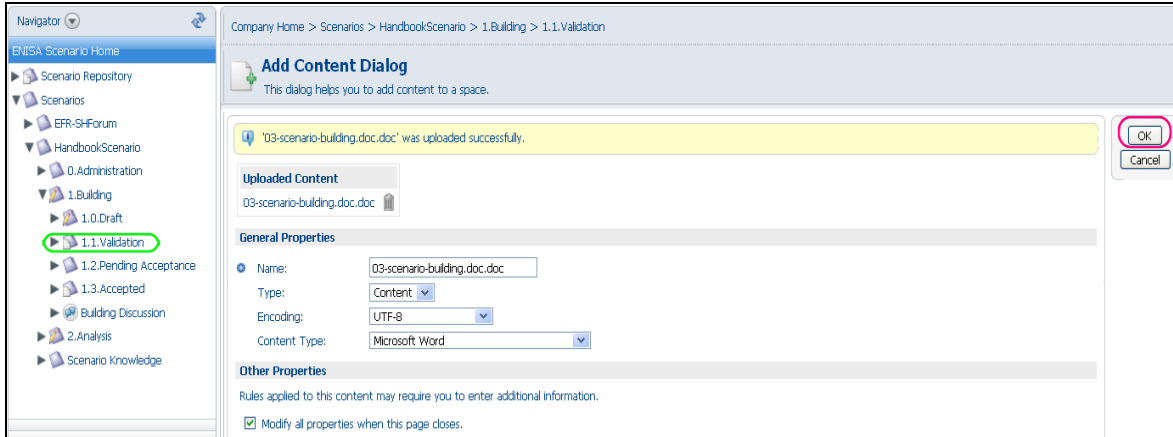
Figure 18: Add content dialog

5. Click OK to confirm.

6. The *Modify Content Properties* dialog appears (Figure 19).
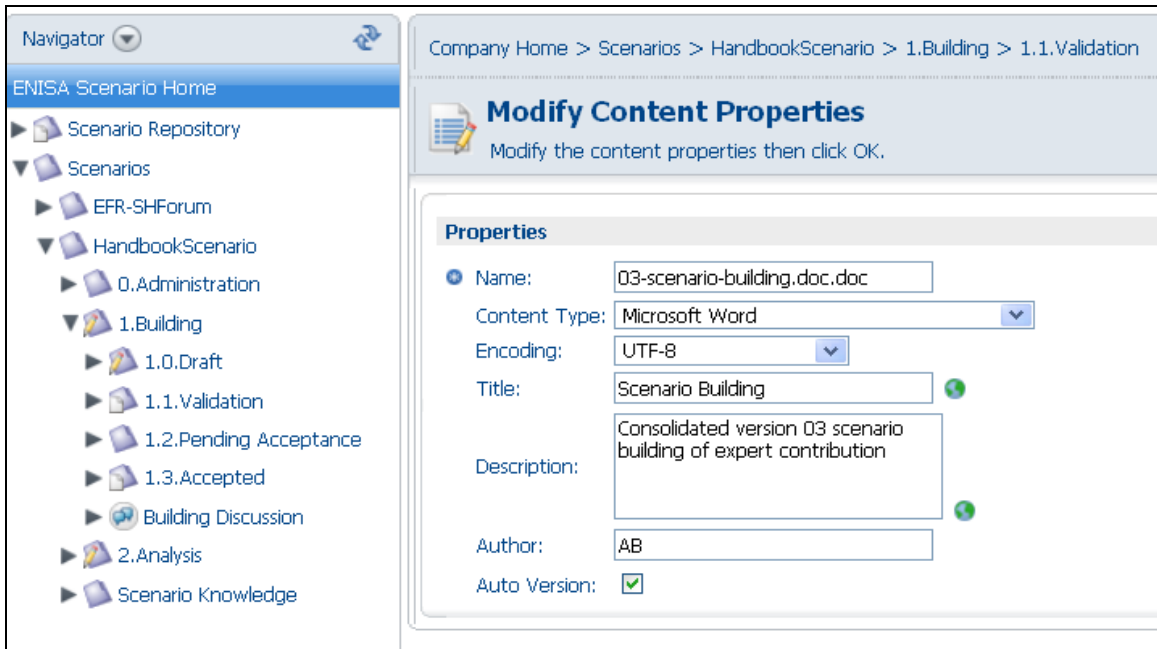
Figure 19: Modify content properties

Verify the pre-populated properties and add information in the text boxes. Name is a mandatory property (as you can tell from the small star next to the label), whereas Title and Description are optional properties. The name defines the file name of the document. Additionally, the user can provide meaningful and appropriate document title and description as well as the author's name. This additional information facilitates the search for this specific document. The more information provided for a document, the more search parameters can be used in order to carry out a successful search.

Auto versioning can be enabled by selecting the Auto Version checkbox. If auto versioning is enabled, each Save and of the document and update (upload) results in an incremented version number which will be reflected in a version history of the document.

If auto versioning is not enabled, the version number is incremented only when the document is checked in (for further explanation on the "check in" of documents see next page).

Click OK to save and return to the space you were in before. The file that you uploaded appears in the Content Items pane of the workspace.

Download a document
In order to download a document the user needs to click on the download button which is the second icon of the "Actions" options attached to the document he would like to download and save on his hard disk.

Figure 20: Download a document

Edit a document
The user has different options to edit content. He can either edit an already existing document offline or he can upload an update from his hard disk.

Edit offline
As mentioned before, you need to have edit permissions on the content to edit documents. In order to edit a document offline the user follows the below procedure.

If you have edit access to a file, you will notice a small pencil (edit) icon as shown in the next screenshot.

By clicking on the pencil icon you can download the element to your hard disk and edit it offline.

Figure 21: Step 1 - Edit document

The downloaded document will be locked for editing by other users (see Figure 22 "lock" icon in the blue circle). Further, a new document is created in the workspace with the name "Working copy".
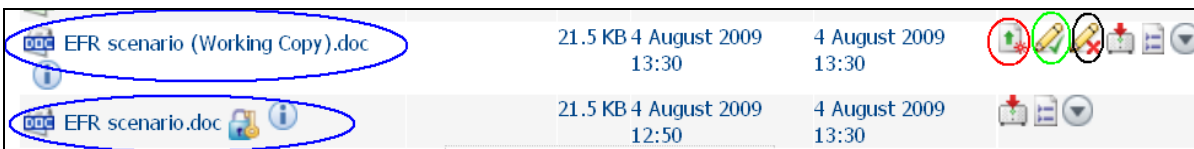
Figure 22: Step 2 - Edit document

Once the user has modified the content on his hard disk, he uploads the new version to the platform by clicking on the upload symbol carrying the green arrow (Figure 22: red circle).

The user is asked to specify whether the document has been modified with minor or major changes.

Note, that uploading a new version will overwrite the former version of the original document. In order to complete with the upload you need to **"check in"** the new version by clicking on the pencil icon with the green checkmark (green circle). If you decide not to edit the original document by uploading the new version you can cancel the action by clicking on the "cancel file editing" icon (Figure 22: black circle).

After uploading the new version the "working copy" and the lock icon on the original file disappear and the modified document replaces the original file maintaining the same file name (Figure 23).

| EFR scenario.doc ⓘ | 21.5 KB 4 August 2009 12:50 | 5 August 2009 08:57 | |

Figure 23: Edit document - Finish

Update a file

Apart from editing a document offline as shown before, the user can also update a document without going offline.

If you have edit access to the file, you will notice the "Update" action icon in the more actions link as shown in the screenshot.

On clicking on the update icon, the update pane opens. Click on the "Browse" button to upload the updated version of the document from your hard disk. Please notice that this function will overwrite the content of the original document while maintaining the original document name.
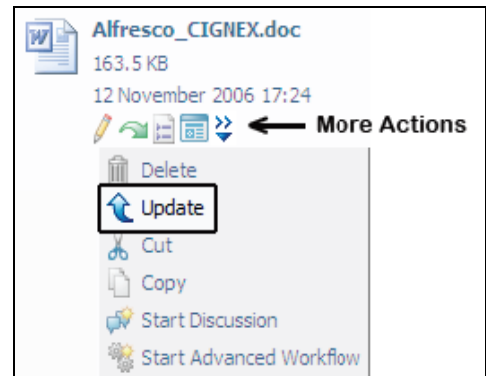
Figure 24: Update File

In comparison to the edit offline function, the update function does not create a working copy and does not lock the document in order to prevent any editing by others. This is not necessary with the Update function since the document will be updated with a content which has been edited at an earlier stage and saved on the user´s hard disk. In the case of the Edit offline function, the document is first downloaded to the user´s hard disk, modified offline and then uploaded again.

File Properties and File History

The user can view the properties of a file by clicking on the "View Details" icon (Figure 25: blue circle).

| EFR scenario.doc ⓘ | 21.5 KB 4 August 2009 12:50 | 5 August 2009 08:57 | |

Figure 25: View details icon

A pane opens displaying details of the file. The most important information for the platform user is the file name, the author and creation date of the original file and the modifiers name and modified date (Figure 26).

Further, the user will have clickable actions as shown in the screenshot on the next page. These clickable actions (icons) will be dynamically generated for a content based on the current user's permissions for that content. For example, if you have copy permission for the content, you will notice a copy icon as a clickable action for that content.
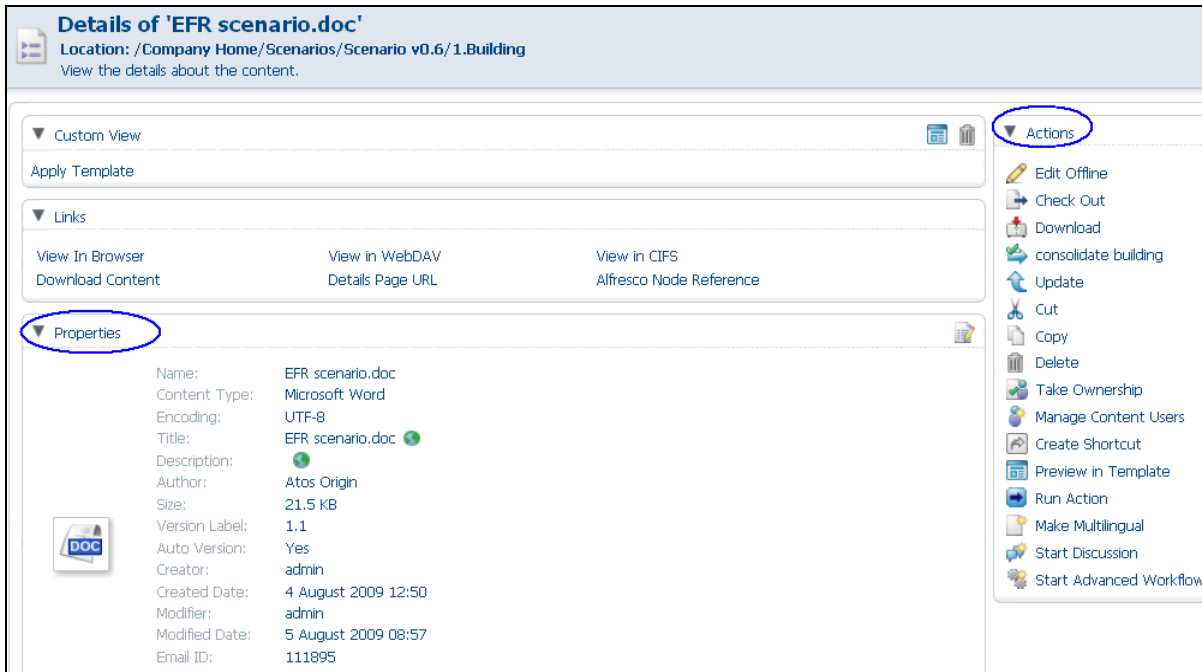
Figure 26: File properties and user actions

Very useful is the link to the "Version History" of the file on the bottom of the screen. There, you find a list of the different file versions and their characteristics (version number, notes, author, upload date, and actions). When uploading a document it is recommendable to fill out the field "Notes" by briefly describing the modifications implemented in the new document version. These notes are integrated in the Version History and serve as a brief change log of the document (see Figure 27).

Figure 27: Version History

Cut, Copy & Paste

From the list of actions as shown in the upper screenshot, you can click on the "Cut" action to move the content to the clipboard. Now you can navigate to any space hierarchy and paste this particular content as required.

Similarly, you can use the "Copy" action to copy the content to another space.

Please note as before, in order to cut, copy & paste from one workspace to another, you need to have the required permission rights.

Using the discussion forums

The platform offers the possibility to create and/or participate in discussion forums. In general, there are discussion forums in every top workspace (scenario phase) and in every validation sub-workspace of each phase. The discussion forums are a collaborative workspace where the users can exchange opinions, comments and give feedback about a specific topic.

Every user involved in a specific scenario can access several discussion forums. Please be aware that the access to the forums and the possibility to actively contribute to a topic depends on the permissions granted to the users. If the user is assigned to work in a specific phase/step, he is also permitted to post comments to each discussion forum associated to this phase/step. In the case that the user is not assigned to work in a specific phase/step, the user is only permitted to read the discussion forums without having the possibility to contribute to them.

For example, Building Validation Experts are only allowed to post comments to the forums associated to the phase Building and the step 1.1 Validation. They may view the other forums of other phases and validation steps, but do not have permission to comment.

The platform provides the following discussion spaces:

- Building Discussion

- Building Validation Discussion

- Analysis Discussion

- Analysis Validation Discussion

- Assessment Discussion

- Assessment Validation Discussion

- Finalization Discussion

Start a discussion forum

Supposing that the user is equipped with the required permissions, he can start a discussion forum by entering the folder "<phase or step> Discussion", for example "Building Discussion".

To create a forum in this discussion, follow the steps given below:

1. Use the "Create" menu drop down list and choose "Create forum" as shown in the screenshot.
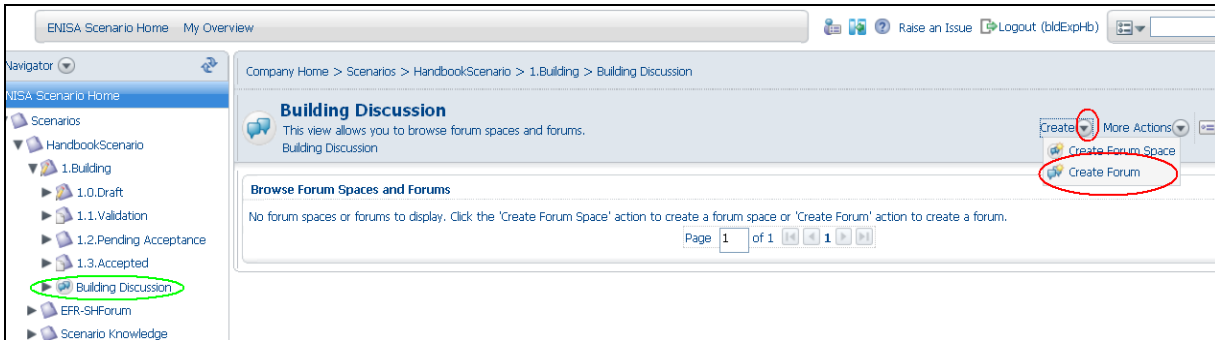
Figure 28: Start Discussion

2. The next window asks you to complete the mask with the forum name. In our example we named the forum "EFR Scenario Building" and accept the name by clicking "Create forum".
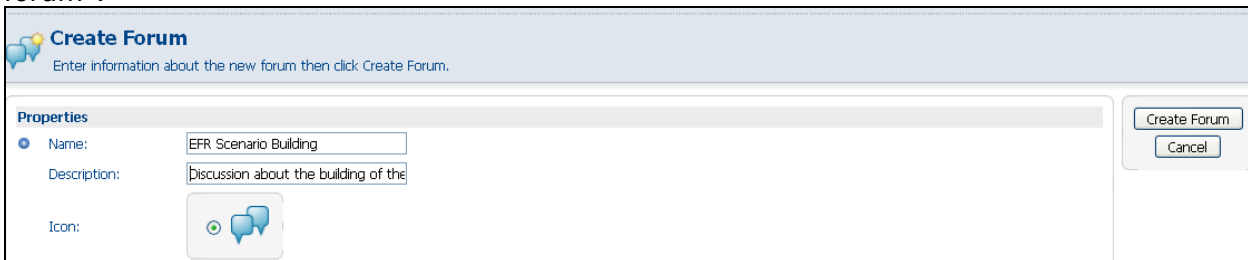
Figure 29: Create Forum

3. The forum is created as shown below (Figure 30):
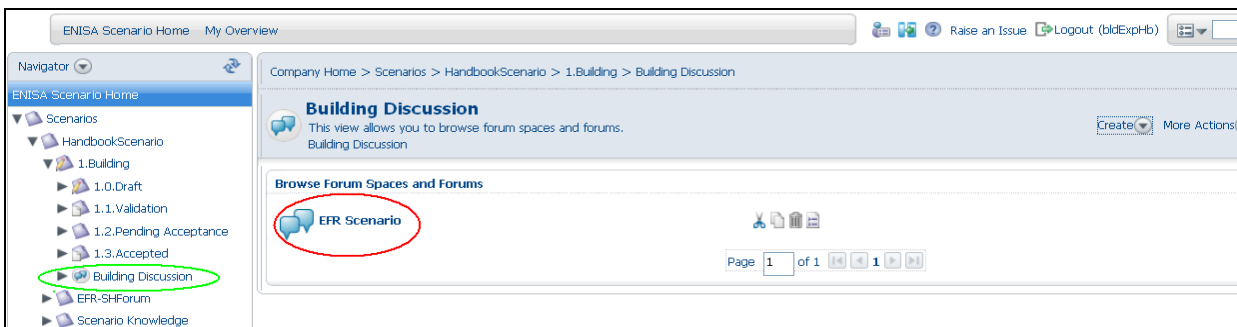
Figure 30: Created discussion forum

Create a topic in a discussion forum
Within a discussion forum, you can create an endless number of topics by clicking on the name of the forum (red circle). Topics are a type of content item like a plain-text item and depict the actual discussion taking place in this forum.

You can create a topic in this forum by following these steps:

1. Use the "Create" menu drop down list and choose "Create topic"

2. A window pops up asking for the topic details as shown in the screenshot below:
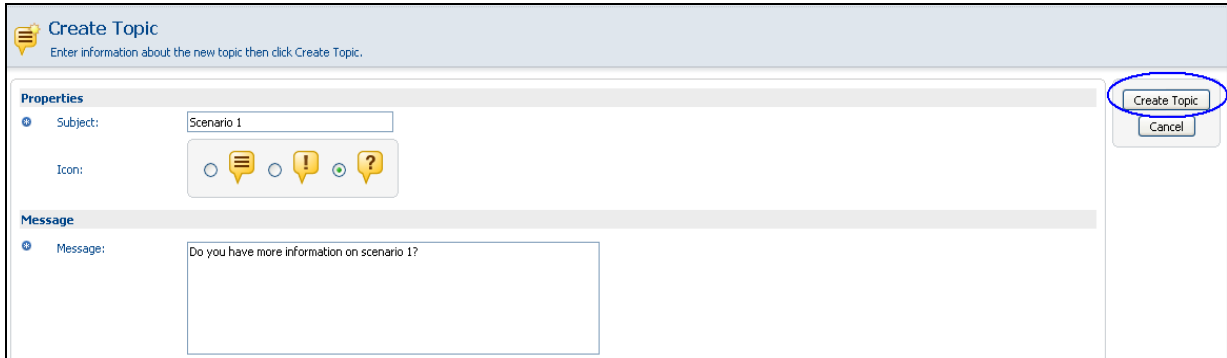
Figure 31: Create topic in discussion

After creating a topic the discussion forum will indicate that there has been a new topic added to this forum (here: "Topic 1" was added to the forum "EFR Scenario", Figure 32):
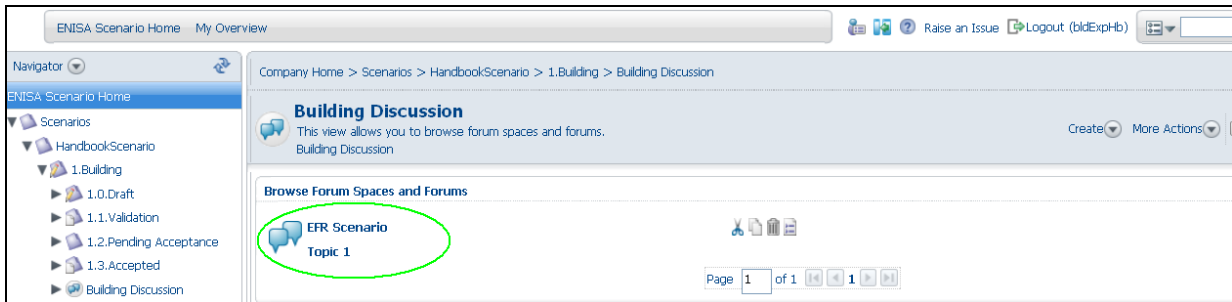
Figure 32: Discussion forum and topic

Users who have access and contribution permission in this discussion forum can reply to this topic. First they need to enter the topic by clicking on the topic name.

A new window appears providing a green response arrow on the right hand side which leads to the option to formulate a contribution as shown in the screenshot below. Please note that there is no limitation on the number of replies (Figure 33).
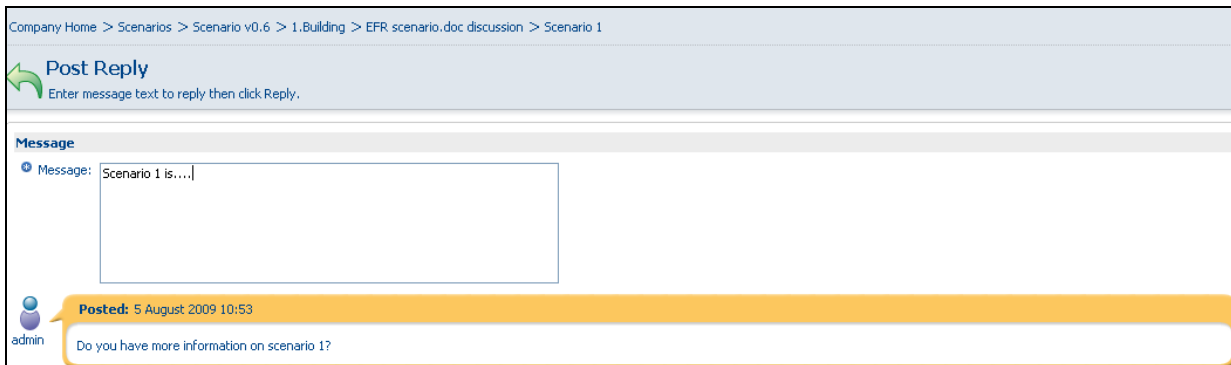
Figure 33: Post Reply

You can create as many topics as you like in a discussion forum. The "Details View" of a discussion forum lists all the available topics and the replies as shown in the screenshot overleaf (Figure 34):
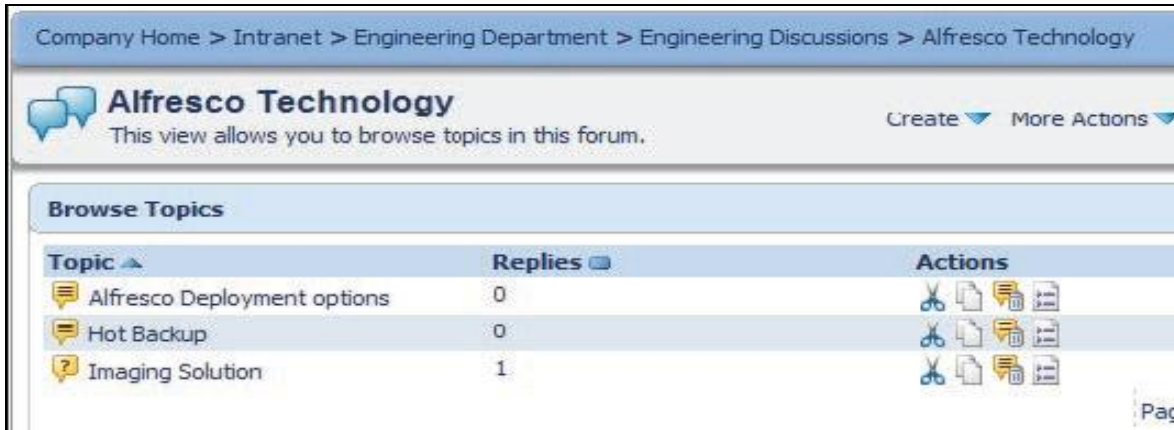
Figure 34: Topic list of discussion forum

Each discussion workspace can encompass an endless number of discussion forums including an endless number of topics. Applying the "Browse View" of a Discussion workspace all forums and topics will be displayed:
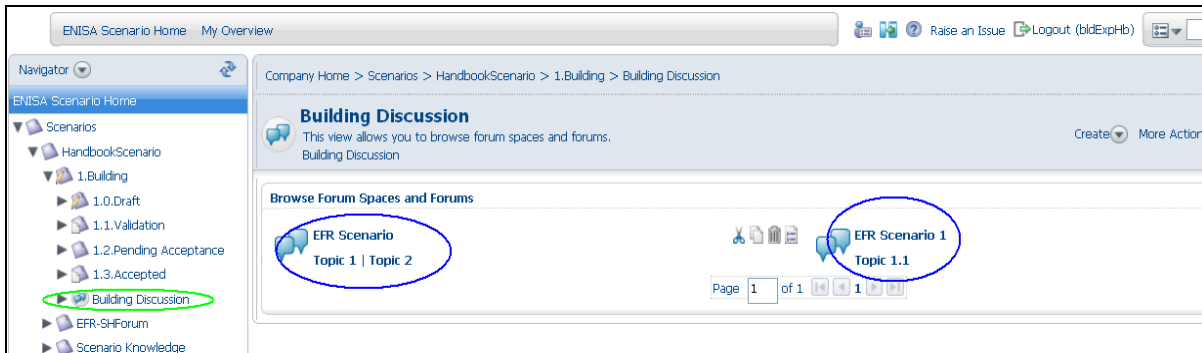
Figure 35: Discussion forums and topics

Notifying and tracking the Progress of Phases

The platform offers a notification and tracking system in order to report the progress of phases. The notification system informs the users about changes which have been made and are subject to their concern and the tracking system supports especially the EFR administrator and EFR Manager in retracing the main actions carried out on the platform.

Notifications

Email notification is a powerful feature which immediately informs the appropriate user about new events of the EFR workflow. The application notifies the involved users when for example documents are uploaded or when changes are made to the certain files. As the workflow proceeds from phase to phase, the platform is configured to send email

notifications to all the parties involved when tasks need to be performed or information needs to be circulated.

Notifications are for example send out when a new scenario has been uploaded and the first phase of the workflow - the "Building" phase - is about to begin. In this case, the system informs the concerned users about the new scenario and notifies them of pending tasks they are assigned to at this specific moment of the process (here: Expert contributions on the created scenario are expected).

One example of such a notification is shown below:

Description	**NOTIFICATION BUILDING FOLDER CONTRIBUTION send to SPECIALIST, EXPERTS**
Recipients	Specialist, Building Matter Experts, Building Validation Matter Experts
Subject	EFR "Scenario Name", Phase: Building, Document uploaded
Body	Greetings. This notification is relevant to the Building phase of the EFR "Scenario Name". A new document "document.name" has been uploaded and it is available at http://document.url Please take into account the new information provided by this document. Discussion on the contents of this document or other topics relevant to this scenario is available at "Building phase forum" Your contributions for this phase must be uploaded at: http://document-workspace.url You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

For more examples of email notifications please see Annex I at the end of the user guide.

Tracking activities

The "My task list" advises the user about pending tasks he needs to accomplish. Besides, the list gives an overview about the different scenarios the user is involved in and informs about the documents currently in progress.

In the following, we present examples of the "My task list" which are generated for different users. The screenshots display an exemplary task list for the Specialist, Experts and Stakeholders.

In our example the Specialist uploads a working document (01-scenario-building.doch) to the Draft workspace of the Building phase. The message on his task list advises the Specialist that he is supposed to gather contributions from the experts and generate the consolidated document (Figure 36).

The other item of the task lists belongs to the Validation workspace of the Building phase. A new working document has been uploaded which requires the validation by the Specialist (Figure 36).

Figure 36: Specialist - Task list of the Building phase/Draft and Validation

By observing the information on the task list, the user can track the progress of his tasks. In our example, the working document relevant for the Specialist is currently in the second step of the Building phase – the Validation step.

Similarly, the involved Experts of the Building phase and Stakeholders are advised about the status of their tasks as shown in Figure 37. They are asked to contribute or post comments concerning the uploaded working document:
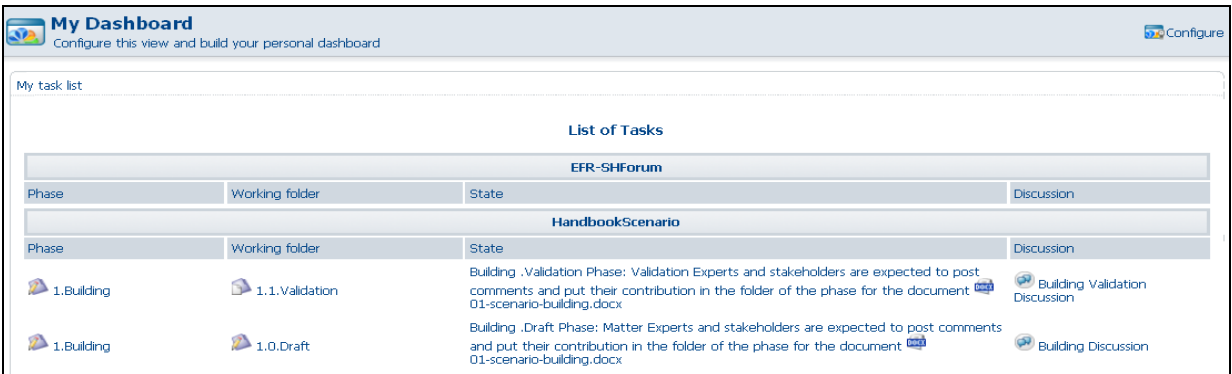
Figure 37: Building phase Experts and Stakeholders - Task list of the Building phase/Draft and Validation

Apart from the information provided by the task list, the users additionally receive email notifications advising about the tasks and phases the user is assigned to. In accordance with our example, **Specialists, Building Matter Experts and Stakeholders** receive the following email notification when a new working document has been uploaded the to the **Draft workspace/Building phase**:

```
Greetings.

You have been assigned to the phase 1.Building/1.0.Draft of the EFR process
HandbookScenario.
A new Working Document "01-scenario-building.docx" has been uploaded and it is available
at http://enisa-server.atosorigin.es/alfresco/d/d/workspace/SpacesStore/79dbd000-e67c-
48ff-9234-070e89a79cab/01-scenario-building.docx

or through the application:
http://enisa-
server.atosorigin.es/alfresco/navigate/browse/workspace/SpacesStore/b46a1127-0bdc-4aca-
820b-a981dec08db7.

You can access and upload other relevant information to this scenario at "Scenario
Knowledge" workspace.

Best regards.
The EFR project.
```

Please find below the according email notification which **Specialists, Building Matter Validation Experts and Stakeholders** receive when a new working document has been uploaded to the **Validation workspace/Building phase**:

```
Greetings.

You have been assigned to the phase 1.Building/1.1.Validation of the EFR process
HandbookScenario.
A new Validated Document "01-scenario-building.docx" has been uploaded and it is
available at http://enisa-
server.atosorigin.es/alfresco/d/d/workspace/SpacesStore/762359ca-8902-4373-a1a9-
d7cc0e5286a4/01-scenario-building.docx

or through the application:
http://enisa-
server.atosorigin.es/alfresco/navigate/browse/workspace/SpacesStore/217a9aeb-7b27-4b5b-
b07b-66f632ff443c.

Please review the document and provide your opinion in the discussion forum of the
validation phase 1.Building at "1.Building Validation Phase Forum".
You can access and upload other relevant information to this scenario at "Scenario
Knowledge" workspace.


Best regards.
The EFR project.
```

Document activity Audit trails

The platform offers the possibility to track the activities completed throughout the workflow by means of the log file. Note that only the EFR platform administrator and the EFR Manager have access to the log.

The log file is automatically generated by the application and reports all activities associated to working documents. Each time a working document is for instance validated, accepted or rejected and therefore moves from one folder to another, the log file will store this activity and the corresponding details (Date, time, author of activity).

Please find below some sample messages from the log file:

Tue, 28 Jul 2009 13:03:00 GMT: User Specialist enisa has uploaded document 03-Bld-scenario_DRL.doc in folder 1.Building//1.2.Pending Acceptance

Tue, 28 Jul 2009 13:03:00 GMT: The document 03-Bld-scenario_DRL.doc has entered the folder 1.Building/1.2.Pending Acceptance due to an action of user Specialist enisa

Tue, 28 Jul 2009 13:03:00 GMT: The document 03-Bld-scenario_DRL.doc has abandoned the folder 1.Building/1.1.Validation due to an action of user Specialist enisa

Tue, 28 Jul 2009 13:02:43 GMT: User Specialist enisa has uploaded document 03-Bld- Information collection and sharing

A more detailed description of the log file can be found in Annex II.

Information collection and sharing

The platform offers a specific workspace for information sharing and collection. This workspace is a knowledge repository which serves as an extra information source for all users with a role in the scenario.

Scenario Knowledge Workspace
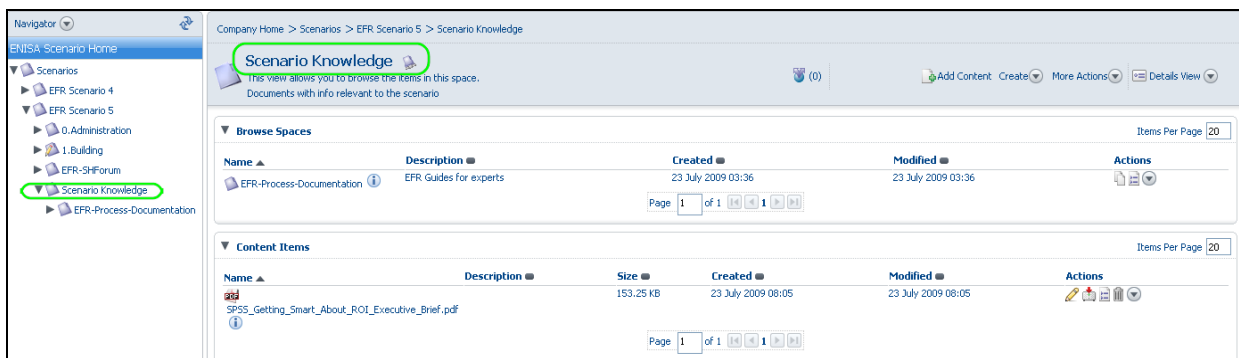
Figure 38: Scenario knowledge

Each scenario has its own scenario knowledge folder which is regarding to the structure of the platform situated at the same level as a top phase folder.

Every user can upload relevant documentation to the folder and share it with all participants of the platform. The documents should be related to the scenario in which they are stored and could for instance contain aspects such as information about a specific

technology, possible risks involved when using a technology or application or trend analysis on diverse issues.

The Scenario Knowledge Workspace provides additional information for everybody involved in performing the EFR process while performing their tasks. The repository is regularly updated and maintained by the EFR Specialists.

EFR-Process Documentation
Which documents will be stored here?

Actions of the Users

The following chapter looks at the basic activities performed by the different users when working with the EFR collaboration platform.

The first section of this chapter gives an overview of basic actions which are essential for all users in order to use the platform. The subsequent sections present then each user group of the platform highlighting the main actions they perform and the workspaces they work in. Basic actions for all users

There are a set of basic actions shared by all users when working with the EFR collaboration platform. Here are some examples of these commonly shared actions:

How and where to contribute by uploading a document

The contributions need to be added to the phase folder they refer to. This means for example that a contribution from the Building Matter Experts needs to be placed in the top folder of the workspace it refers to, in this case the 1.Building folder. Therefore, the user needs to navigate to the Building folder and upload to this folder the contribution he would like to submit.
For specific instruction concerning the upload of a document please be referred to chapter 8 (Section 8.1) of this user guide.

How to contribute by uploading a source of relevant information

This type of additional information should be stored in the workspace *Scenario Knowledge.* This folder is not linked to any process phase and serves as a general information repository which can be accessed by all users. The purpose of this folder is to store documents providing additional information which could be relevant for all users in order to perform their tasks.
The upload of this kind of documents has to be carried out in the same manner than uploading a document to the other workspaces.
For specific instruction concerning the upload of a document please be referred to chapter 8 (Section 8.1) of this user guide.

How to contribute by participating in a discussion

Every user involved in a specific scenario can access several discussion forums. Please be aware that the access to the forums and the possibility to actively contribute to a topic depends on the permissions granted to the users. If the user is assigned to work in a

specific phase/step, he is also permitted to post comments to each discussion forum associated to this phase/step. In the case that the user is not assigned to work in a specific phase/step, the user is only permitted to read the discussion forums without having the possibility to contribute to them.

In order to contribute to a discussion the user needs to navigate to the discussion workspace where he can start a new discussion forum or reply to an already existing forum.

For detailed information about discussion forums please see chapter 10.

How to track the state of a working/output document

One of the platform´s structure principles consists in the fact that the location of the working documents indicates the state in which the documents are in. This means that for example a document stored in the "Pending Acceptance" step of a workspace is at this moment pending to be approved by the EFR Manager before the document can proceed within the workflow.

In particular, any user can track the state of a working document relevant to him by checking his "My task list". This list reveals at a first glance which documents are pending to be worked with and automatically indicate the workspace the documents are in.

How to know when it is time to contribute

As soon as the user enters the platform with his user credentials, "My tasks list" will be displayed informing about any pending tasks. Apart from informing about the scenario name, phase and working folder the document is, the list gives further advice about the task the user is expected to perform. By clicking on the document link of the pending task, the user is directly forwarded to this document in order to contribute.

In addition to this, every time the users are expected to contribute they will receive email notifications advising about pending tasks and providing direct links to the relevant files.

EFR Specialists

Generally speaking, the EFR Specialists supervise all phases and ensure a smooth functioning of the process.

The Specialists contribute actively in two sub-workspaces of the different scenario phases, explicitly they will cope with tasks in the Drafting and the Validation steps. They are mainly responsible to provide scenario templates and to consolidate the contribution documents of the Experts and send them to the according folders of the different phases.

Ultimately, they are responsible to move finished scenarios to the corresponding "Scenario repository" folder.

Actions EFR Specialists

- Copy scenario templates to Draft
- Upload initial working document
- Create consolidated working documents
- Send working documents to Validation and Pending Acceptance
- Participate in Discussion forums
- Store finished scenarios

Actions in following workspaces:

- 0.Administration
- Draft
- Validation
- Finalisation phase
- Discussion workspaces of all phases
- Stakeholder Forum Discussion
- Scenario Knowledge workspace

Actions of the EFR Specialists

The EFR Specialists perform the following actions during the phases of the EFR process:

- Copy the scenario template from the 0.Administration folder to the Draft folder of the respective phase.

- Upload an initial working document version in order to trigger the beginning of the workflow

- Based on Experts contributions create consolidated versions of the working documents and send them from Draft to Validation or from Validation to Pending Acceptance

- Participate in Building Discussion, Building Validation Discussion, Stakeholder Forum Discussion

- Store finished scenarios in the scenario repository folder

The Drafting step

One of the tasks the EFR Specialists needs to accomplish during the Drafting step is copying the scenario template document of the according phase from the 0.Administration folder to the Draft folder of the same phase.

The scenario templates for each phase of the EFR infrastructure (Building /Analysis/ Assessment/Finalization) are stored in the 0.1Templates subfolder of the 0.Administration workspace as shown in the screenshot below:
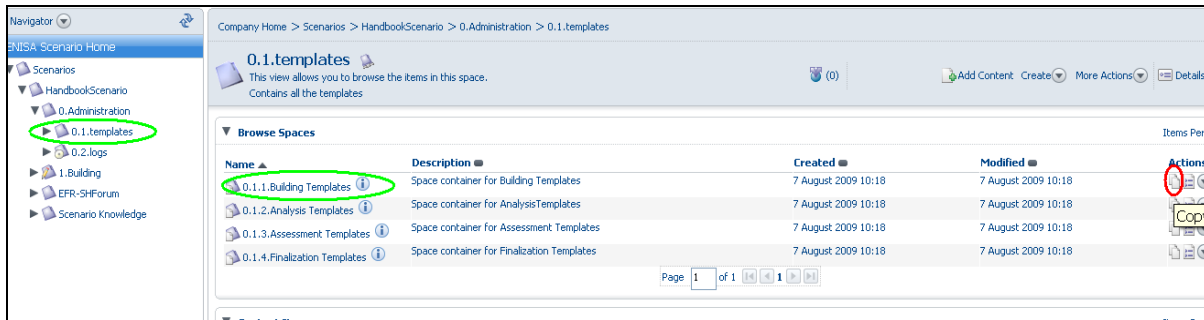

Figure 39: Copy Building template

Further, the Specialist is in charge at this early stage to upload an initial version of the working document. This initial version can be based on the template or on the output documents of the previous phase. In the case of the Building phase, for example, the initial working document is likely to contain just a minimum set of data (i.g. scenario name,…) since the process is only about to start.

At this point it is mandatory to upload the initial working document according to the working document naming convention (i.g. 01-scenario-building.doc) and by this means ensuring the beginning of the workflow.

The initial working documents now stored in the Draft workspace serve as the starting point for the Experts to elaborate their contributions.

By the time the Experts have submitted their contributions to the top phase folder (Building Matter Experts contribute to the 1.0Building folder, Analysis Matter Experts to the 2.0Analysis folder etc.) the Specialists receive an email notification informing them that new documents have been uploaded and are ready to be consolidated.

They can either follow the link provided in the email, click on the appropriate file in the "My tasks list" or navigate to the according top phase folder in order to access the different expert contributions.

The Specialists' task at this moment of the workflow is to consolidate the different expert contributions into one working document. Several steps are required to **consolidate a document**:

1. The Specialists download the different Expert contribution to their hard disk and create a consolidated version of the working document.

2. The working document is uploaded by the Specialist to the Draft folder (Choose the "Add Content" option in the Draft folder). According to the documents naming convention, the Specialists upload the working document with the file name 01-scenario-<phase>.doc whereas the numbers refer to the scenario template the working document is based on. Please note that the term "scenario" remains an obligatory and unchangeable item of the working document name. The working documents must carry the term "scenario" in their file name.

3. After having possibly discussed about the working documents and upload all of them, the Specialists send the consolidated version from Draft to Validation by selecting the **consolidation action**. During the Building phase, for example, the Specialist clicks on the "More Actions" button and chooses the "consolidate building draft" option from the drop down menu as shown below:
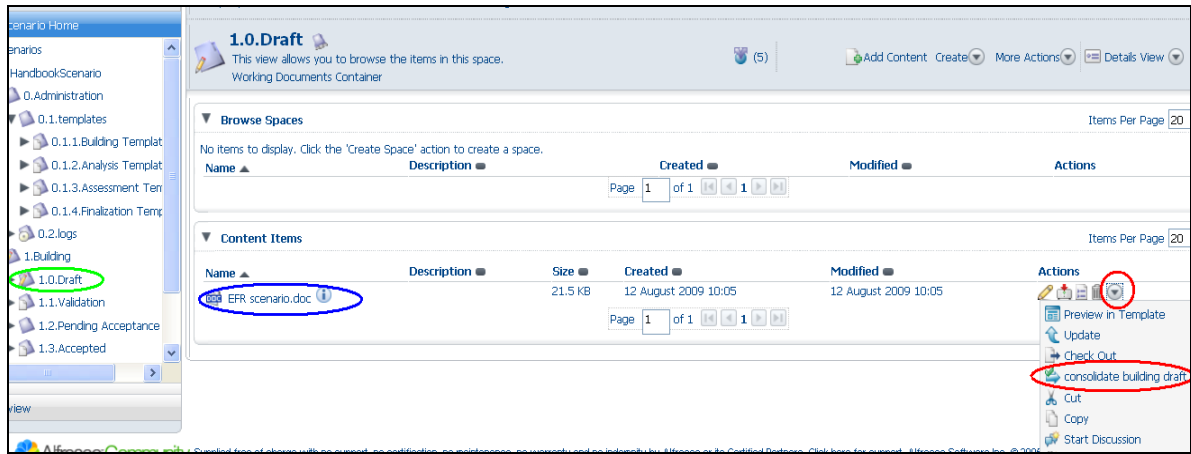
Figure 40: Send working document to Validation

The Validation Step

The working document is automatically forwarded to Validation and is available for the next step and the involved users are notified by email. Like before, the Experts in charge begin to comment and validate the scenarios and upload their contributions to the top phase folder.

In accordance to the Draft step, the Specialists collect the different Expert contribution documents from the top phase folder and create a consolidated version of the working document which they upload to Validation. By selecting the "send for approval" option from the Actions menu (Figure 42), the working documents with the validated scenarios are automatically send to the next step of the phase – the Pending Acceptance.
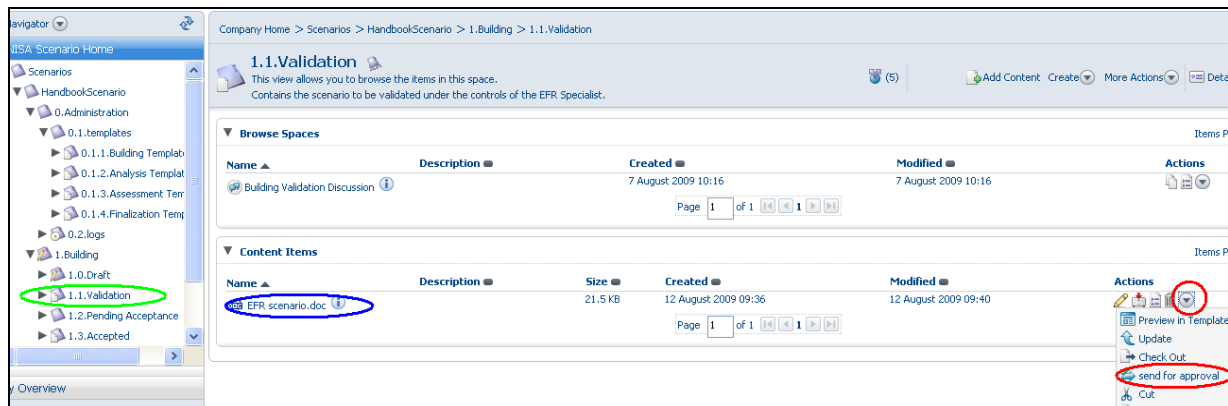
Figure 41: Send working document to Pending Acceptance

How to reject a working document from validation back to the drafting step

In case the Specialist decides that the working document is not ready to be approved, he can reject the document and send it back to Draft for refinement (Figure 42):
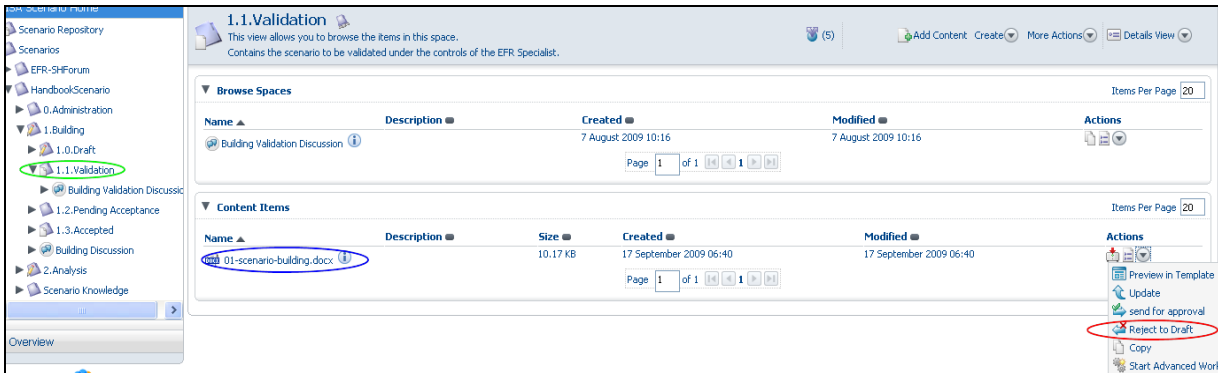
Figure 42: Reject to Draft

Store finished scenarios

A scenario is considered to be finished when all working documents are stored by the EFR Manager in the Accepted sub-workspace of the Finalisation phase.

At his point of the process, the EFR Specialist is in charge of moving the entire scenario folder by using the Cut & Paste function.

In order to avoid the overload of the 4.3Accepted folder, the scenario is moved to the "Scenario repository" folder where all finished scenarios are stored.
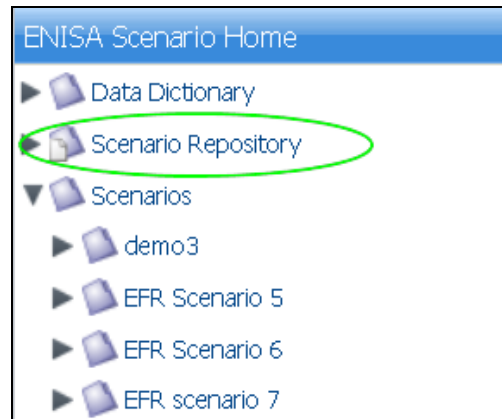
Figure 43: Scenario Repository

Apart from the above mentioned activities, the EFR Specialists have the possibility to participate at any time in the three existing **Discussion workspaces** of the different phases. For more details about these workspaces please see the section on Discussion forums.

Like all other users, they can further partake in the information sharing and collection by contributing or downloading information to and from the Scenario Knowledge workspace.

Experts

There are two different types of Experts per phase working on the EFR platform. Depending on their field of expertise, Experts either work in the phases Building, Analysis, Assessment or Finalisation. As described in previous chapters, there are also different types of Experts working within the same phase. During the Building phase, for instance, the following Experts form part of the scenario building process:

- Building Matter Experts
- Building Validation Matter Experts

The Building Matter Experts, for example, are actively involved in the 1.0Draft sub-workspace whereas the Building Validation Matter Experts accomplish their tasks in the 1.1Validation sub-workspace.

Actions Experts
- Download scenario templates
- Upload contribution documents
- Participate in Discussion forums

Actions in following workspaces:
- Draft
- Building
- Validation
- Discussion workspace of assigned phase
- Validation Discussion of assigned phase

Actions of the Experts

The Experts and Validation Experts carry out the following actions during the

phases of the EFR process:

- Download scenario templates of the respective phase

- Upload Expert contribution documents to the top phase folder. Consider the naming convention: 01<exp_username><Phase><ss>.doc

  Please note that the first number needs to be identical to the number in the scenario template the contribution is based on.

- Participate in their respective Discussion forums

The Drafting Step

The Experts automatically receive an email notification as soon as a working document has been stored in the Draft folder. At this point, the main tasks of the Experts start.

In each phase, the involved Experts are expected to contribute to the working document/s of the phase. Therefore, Experts initiate their actual working process by downloading the corresponding template document and replenish it with their contribution. Building Matter Experts download for example the template-Building.doc from the 1.0Draft folder.

Once they have filled out document template, they upload their contribution (the filled template) to the system, following the appropriate naming convention (see below). These contributions will be used by the Specialist to consolidate the working document.

The different steps to be accomplished are summarized as follows:

1. Download the scenario templates from Draft necessary to create the Expert contribution.

2. Upload the contributions to the top phase folder following the instructions given in the example below:

   In our example the Expert with the username "A" is performing his tasks in the Building phase:

   - Expert "A" downloads for example 01-template-Building.doc to his hard disk

- Experts create a contribution document based on the information from the Building template

- Expert accesses the 1.0Building top phase folder

- Clicks on "Add Content"

- Uploads the contribution document in accordance with the naming convention **01-<exp_username>-<Phase>_<ss>.doc.**

   In our example: 01-exp_A-Building_<01>.doc

   The first number must be identical to the number of the scenario template the Expert contribution document is based on. In this case the contribution is based on the template 01-template-Building. The last number represents a two digit serial number that needs to be incremented on every new contribution of the expert corresponding to the same Working document (01,02,3,..,etc).

   Please note that the Expert contributions should not carry the word "scenario" in the file name since only working documents include "scenario" in their document names.

The contributions of the Experts are integrated by the EFR Specialists to a consolidated working document and forwarded to Validation.

The Validation Step

From now on, another group of Experts - the *Validation Matter Experts* of each phase- will be notified by email. They are asked to comment on and/or modify the working documents stored in the Validation folder.
Similar to the steps described in the above section, they download the working documents from the Validation folder and add their contributions. Their contribution documents contain the Experts' evaluation about the created scenarios and assess if the scenarios fulfil all requirements and are therefore considered to be valid.

Validation Discussions of each phase

Apart from the general Discussion workspace of each phase accessible for both Expert types, the Validation Matter Experts can additionally exchange opinions on the special *Validation discussion forums* in the Building, Analysis and Assessment phase. This workspace is mainly designed for the Validation Experts and serves as a tool to exchange ideas and opinions amongst them. Besides, EFR Specialists, and the EFR Manager can actively participate and contribute to the Validation Discussion workspace. The screenshot below shows an example of a Validation Discussion.

Figure 44: Building Validation Discussion

Like all other users, they can further partake in the information sharing and collection by contributing or downloading information to and from the Scenario Knowledge workspace.

EFR Manager

The main responsibility of the EFR Manager is to monitor, examine and approve the scenarios designed by the Experts. He will intervene in the last sub-workspaces "Pending Acceptance" and "Accepted".

Actions EFR Manager

- Approve and reject scenarios
- Manually open new scenario phases
- Participate in different Discussion forums

Actions in following workspaces:

- Pending Acceptance
- Accepted
- Discussion workspaces of all phases
- Validation Discussions of all phases
- Stakeholder Forum Discussion
- Scenario Knowledge workspace

Actions of the EFR Manager

The EFR Manager performs the following actions during the phases of the EFR process:

- Monitor the process
- Examine the scenarios provided by the Experts
- Approve scenarios
- Reject scenarios and send for correction or rebuilding
- Open new scenario phases
- Participate in the Discussion and Validation Discussion workspaces of each phase and the Stakeholder Forum Discussion

The Pending Acceptance Step

In the same manner than the other users, the EFR Manager is notified whenever a new working document has been stored in the Pending Acceptance folder and is pending to be approved. At this moment of the process, the EFR Manager decides whether the document is approved and able to enter the next phase or if it is rejected.

Approve a document:

In the case that the scenario described in the working document copes with the required criteria, the EFR Manager forwards the document to the last sub-workspace Accepted. In order to approve the scenario, the EFR Manager chooses from the "Action" drop down menu the option "<phase> accepted". Supposing he is working in the Building phase, he chooses **"building accepted"** as shown in Figure 44. In this example the working document is automatically sent to the 1.3Accepted folder, the last sub-workspace of the Building phase.
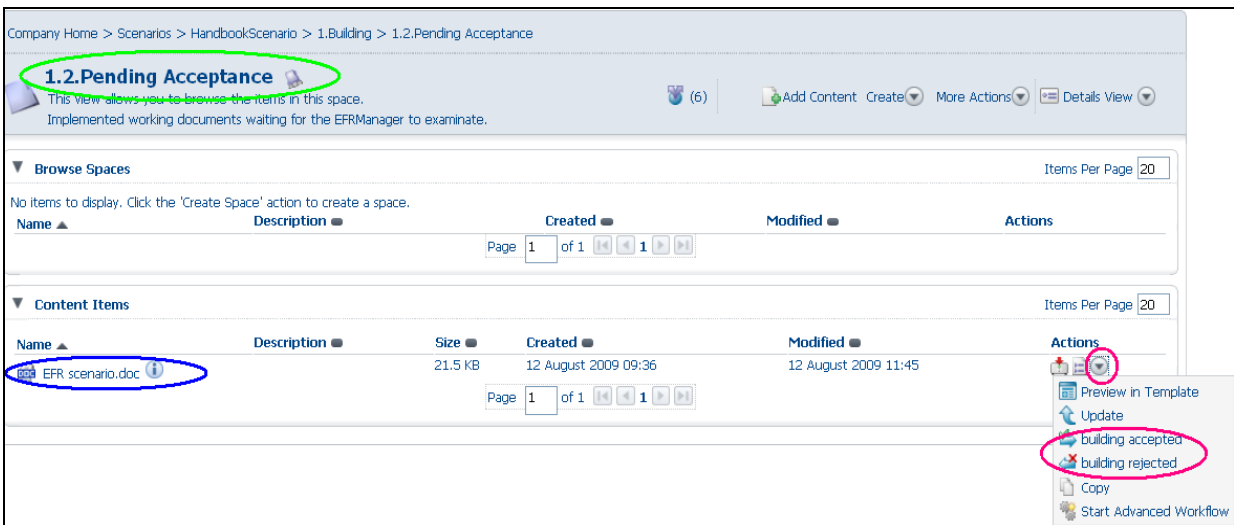
Figure 45: Approve working document

Reject a document:

In case that the EFR Manager decides that the document needs to be refined he rejects the document. According to our example, he rejects the created scenario by selecting **"building rejected"** from the "Actions" drop down menu (Figure 44). The document is automatically sent back to the 1.0Draft folder where the elaboration of the scenario will start once again.

The Accepted Step

During this last step of each phase the EFR Manager is in charge of finalizing the phase by sending the working document to the subsequent phase in order to be examined by another group of Experts.

At this point, the EFR Manager has two options:

- Send the working document to the Draft folder of the next phase
- Send the working document back to Draft folder of the current phase

As illustrated in the below screenshot, the EFR Manager can choose from the Action menu whether he sends the working document to the next phase or back to Draft to be refined.

Figure 46: Send document to Analysis

Please note that apart from being send back to Draft, a working document which has already passed on to the "Accepted" state may still be edited by the EFR Specialist.

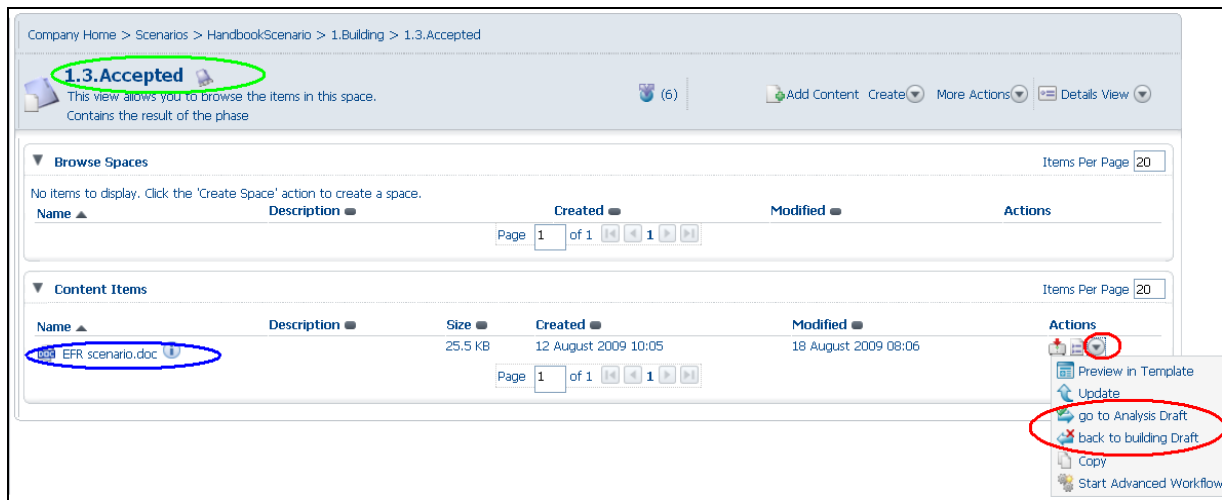When all working documents are stored in the Accepted folder the Specialists, Experts, EFR Manager and the Stakeholders are notified that the next phase can start.

Open a new scenario phase

As briefly described in a previous chapter, the system automatically opens the subsequent phase whenever the anterior phase has been finalised. A phase is considered to be finalised when all working documents have been stored in the "Accepted" folder of the workspace.

This means, for example, if there is still one working document in the Building Draft step and all other working documents are already stored in the Building Accepted step, the system will not open the Analysis phase until the remaining document has been send to the Accepted folder as well. During a normal course of the workflow, a new phase can only be opened when the previous one has been finalised.

However, the opening of a new phase can also be carried out manually even if the previous phase has not been finalised yet. This rather exceptional action can only be carried out by the EFR Manager and the EFR Specialists. They are the only users equipped with the specific permissions to manually open the next phase.

In order to open a new scenario phase, the EFR Manager needs first to navigate to the phase he would like to open. In our example, the EFR Manager opens the Analysis phase manually as shown below:

1. Choose the option "View details" from the "More Actions" drop down menu
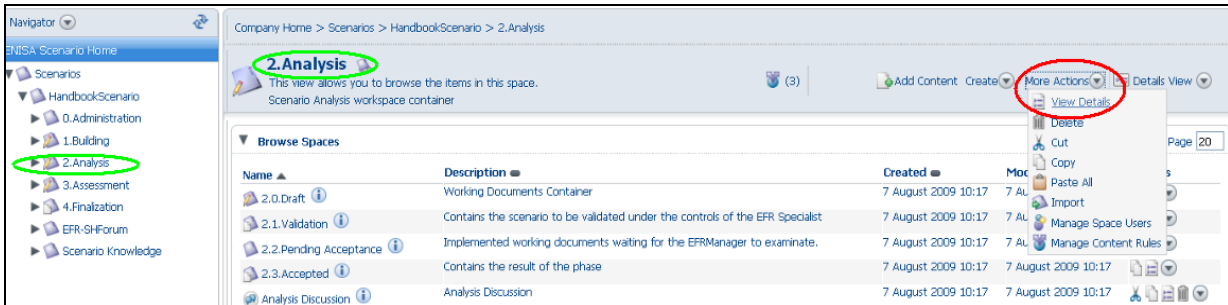
Figure 47: Open Scenario manually – I

2. Select from the Actions list "Run Action"
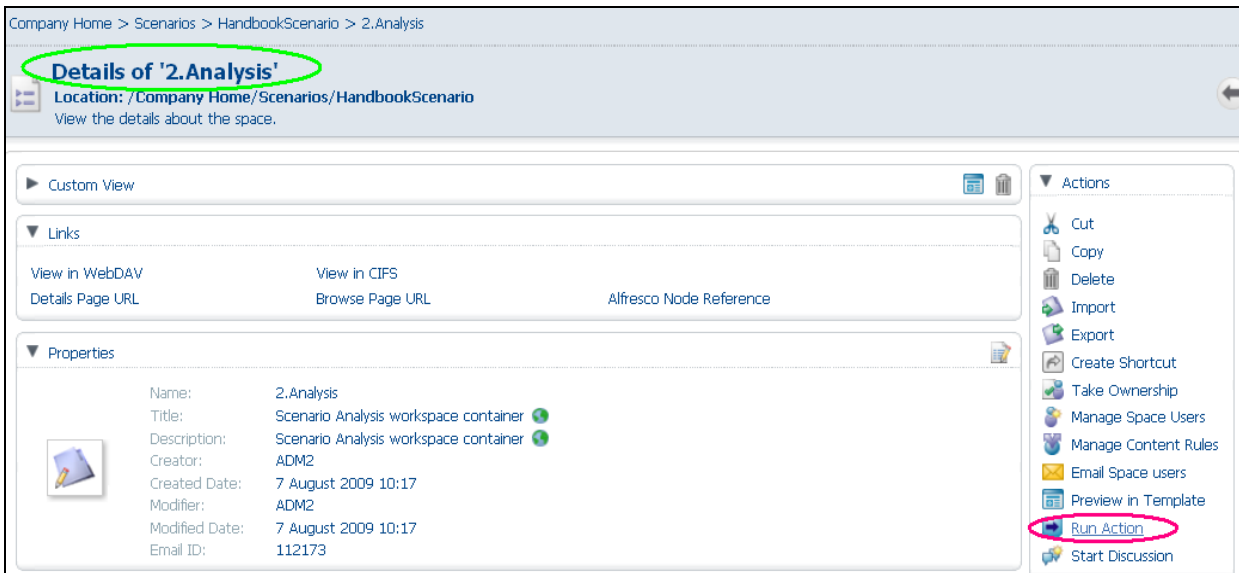
Figure 48: Open Scenario manually – II

3. In the list provided by the Run Action Wizard, choose the option "Execute a script" and activate this selection by clicking on the button "Set values and select" and then click on "Next"

Figure 49: Open Scenario manually – III

4. In the next window select from the drop down list "userOpenPhase.jr" and continue by clicking on "OK"
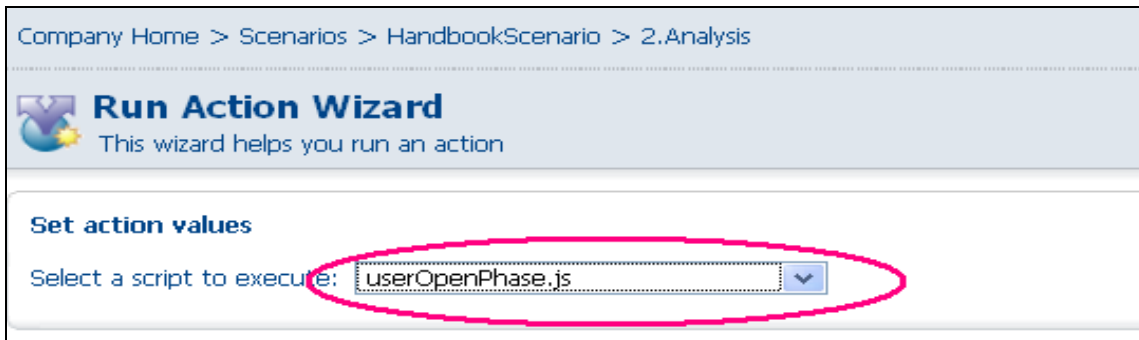
Figure 50: Open Scenario manually – IV

5. The last window shows a summary of the action and needs to be finalised by clicking on "Finish".

Like all other users, the EFR Manager can further partake in the information sharing and collection by contributing or downloading information to and from the Scenario Knowledge workspace.

EFR Stakeholder Forum
The role of the EFR Stakeholder Forum in the EFR process is mainly advisory. The EFR Stakeholders have access rights to every workspace and principally support the other

users with comments on scenarios or specific issues and give advice related to areas of their expertise.

The EFR Stakeholder Forum carries out a universal role during the performance of the workflow and will remain unchanged in their composition. In other words, the same EFR Stakeholders represent the Forum during all phases of the EFR process.

Actions EFR Stakeholder Forum
- Provide advice to the users on specific topics in all phases
- Participate in Discussion forums in all phases

Actions in following workspaces:
- Draft
- Validation
- Pending Acceptance
- Accepted
- Discussion workspaces of all phases
- Stakeholder Forum Discussion
- Scenario Knowledge workspace

Actions EFR Stakeholder Forum

The members of the EFR Stakeholder Forums carry out the following actions during the "Building" phase:

- Give support to the users

- Providing advisory services on a specific issue

- Contribute and exchange opinions on the different Discussion forums of all phases

The EFR Stakeholder forum workspace

The members of the EFR Stakeholder Forum dispose of a workspace especially created for them in order to add contributions or discuss in a special discussion workspace – the Stakeholder Forum discussion (see the section on Discussion forums).

The members of the Stakeholder Forum can upload contributions to the EFR Stakeholder forum workspace by clicking "Add Content". For more detailed information on uploading a documents please be referred to the according section "Upload a document".

These Stakeholder contributions can be downloaded by all other users and can serve as an additional information, support or advice for them in order to perform their tasks.

Similar to the other users, the Stakeholders can participate in the discussion forums created on the platform.

Further, the EFR Stakeholder Forum workspace disposes of a special discussion workspace principally created for the members of the Stakeholder Forum.

All users have access rights to the Stakeholder Forum discussion, so they can follow the discussions, but only the Stakeholders, Specialists and the EFR Manager have edit permissions. The Experts cannot edit in the Stakeholder Forum discussion.

The screenshot below illustrates the most important features of the EFR Stakeholder Forum workspace:
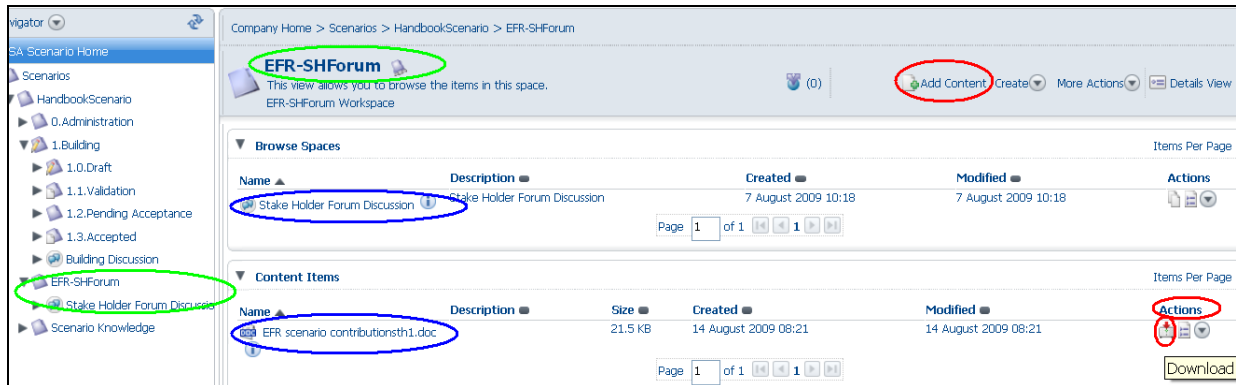

Figure 51: EFR-SHForum workspace

Like all other users, they can further partake in the information sharing and collection by contributing or downloading information to and from the Scenario Knowledge workspace.

Discussion workspaces of the EFR platform

The users have diverse possibilities to participate in discussion forums of the EFR platform. In the following, we take the Building phase as the showcase in order to demonstrate the different discussion options the user disposes of during each scenario phase.

During the Building phase the users can contribute to a total of three different Discussion workspaces:

1. Building Discussion

2. Building Validation Discussion

3. Stakeholder Forum Discussion

Please note that not all users will have access to all of the three discussion workspaces and follow discussions whereas not all users have edit rights for all discussion workspaces.

The "Building Discussion" is the general discussion workspace of the Building phase. It contains general feedback about this first phase. All users have the possibility to actively participate in the discussions of the Building phase, exchange opinions or doubts, and give advice by posting messages to the forums. This means they can both create new discussion forums and invite other users to exchange opinions on a specific issue or simply reply to the comments of others. The Building discussion presents a sub-workspace in the Building phase. For more detailed information on the basic management features of the discussion forums please see the specific chapter on discussion forums.

The "Building Validation Discussion" is a discussion workspace especially designed to exchange information on the issue of validating scenarios. Please note that note all users have the possibility to participate in this discussion forum. The Building Validation Matter

Experts, the EFR Specialists and the EFR Manager can contribute to these discussion forums.

The "Stakeholder Forum Discussion" serves as a main communication tool for the EFR Stakeholders. By means of these forums, the Stakeholders can chat and exchange opinions and doubts. According to their rather universal role of examining and monitoring the process, the EFR Specialists and the EFR Manager are also able to actively participate in this "Stakeholder Forum Discussion" workspace.

EFR Administrator

The EFR Administrator is not bound to any specific phase of the process and does not participate in the actual working tasks of the EFR process. His main working field is the provision of administrative and technical support.

Actions EFR Administrator

- Create new scenarios
- Add new users
- Assign scenario roles
- Administer log file

Actions of the EFR Administrator

The EFR Administrator has permissions to all workspaces and all system files including the system folder "Data Dictionary" which must not be deleted under any circumstances and which should not be modified unless you have profound knowledge of Alfresco and the EFR process implementation.

In addition, he has access to the log of the application which serves for tracking the actions of different users and the general movements on the platform.

Apart from the general administrative tasks, the EFR Administrator performs several tasks which should be explicitly mentioned in the next sections.

Create new scenarios

The EFR Administrator is in charge of creating new scenarios for the EFR collaboration platform. Once having accessed with the administrator credentials, the EFR administrator needs to navigate to the "Scenario" folder and click on the "Create" button. From the drop down menu he selects the "Advanced Space Wizard" option as shown in Figure 51.

Figure 52: Create Scenario – Advanced Space Wizard
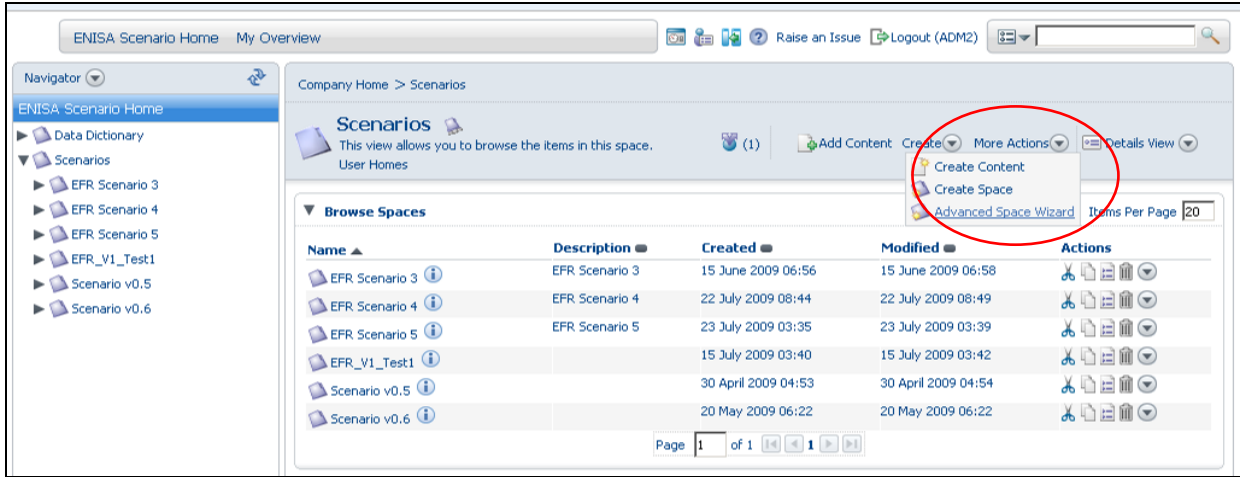
The next screenshot displays the Create Space Wizard where the EFR Administrator selects the "Using a template" option and clicks next:

Figure 53: Create Scenarios – Starting Space

The administrator is asked to select the template he wants to use. By default configuration he ought to choose the template "EFR Processv1_0":
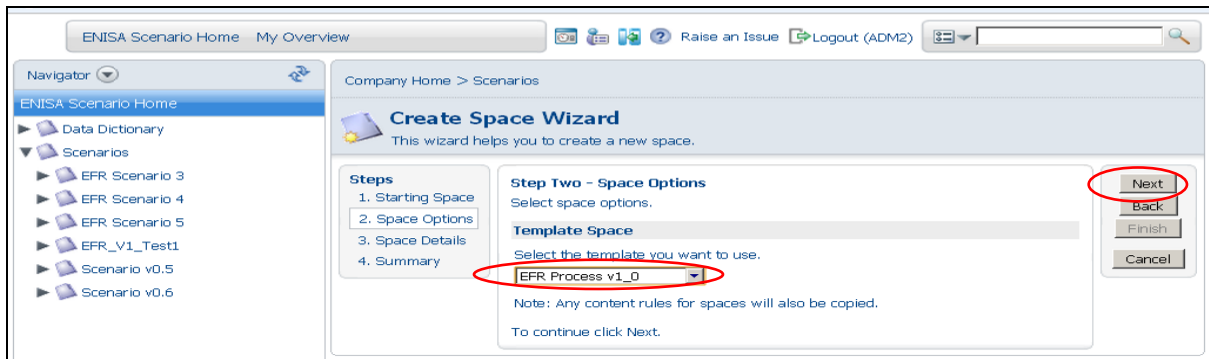
Figure 54: Create Scenario - Space Options

After he selected the template, the EFR administrator is asked to complete the scenario details as illustrated below:
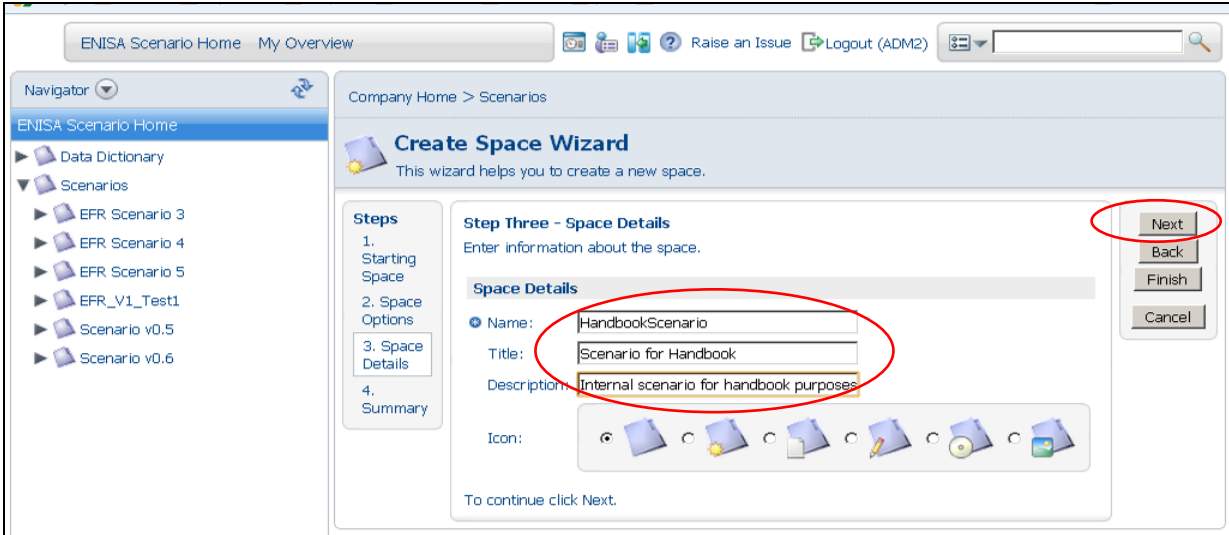
Figure 55: Create Scenario - Scenario details

The last window presents a summary of the replenished scenario details. The scenario creation is completed by clicking on "Finish".

Add users to the system

Besides the creation of new scenarios, the EFR Administrator is also responsible to add users to the system. By accessing the "Administration Console" on the top menu, the administrator is able to manage several system administrative functions. The Administration Console can be accessed via an icon on the "Enisa Scenario Home" page as indicated below:
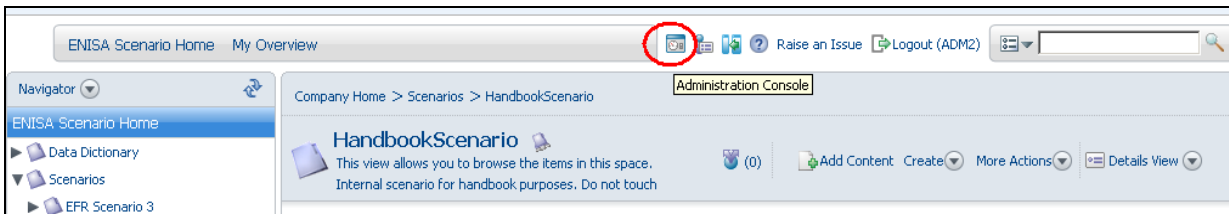
Figure 56: Administration Console

In order to add users to the system, the administrator needs to select "Manage system user" from the administration console:
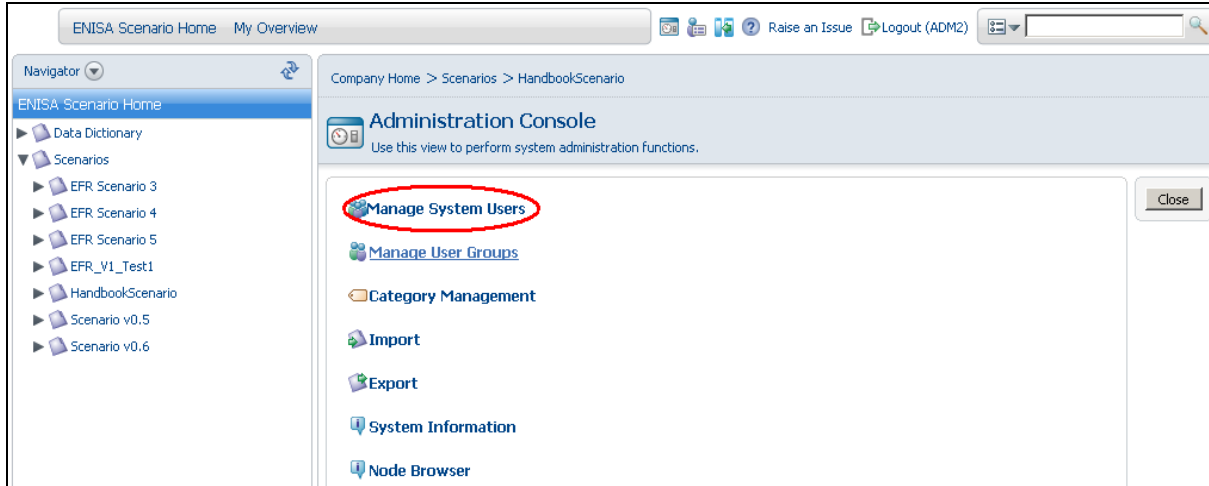
Figure 57: Administration Console - Management System Users

Then, the administrator chooses the "Create User" option as shown below:

Figure 58: Create User

The "New User Wizard" guides through the steps necessary to add a user. The EFR Administrator needs to complete first the person properties as shown below:
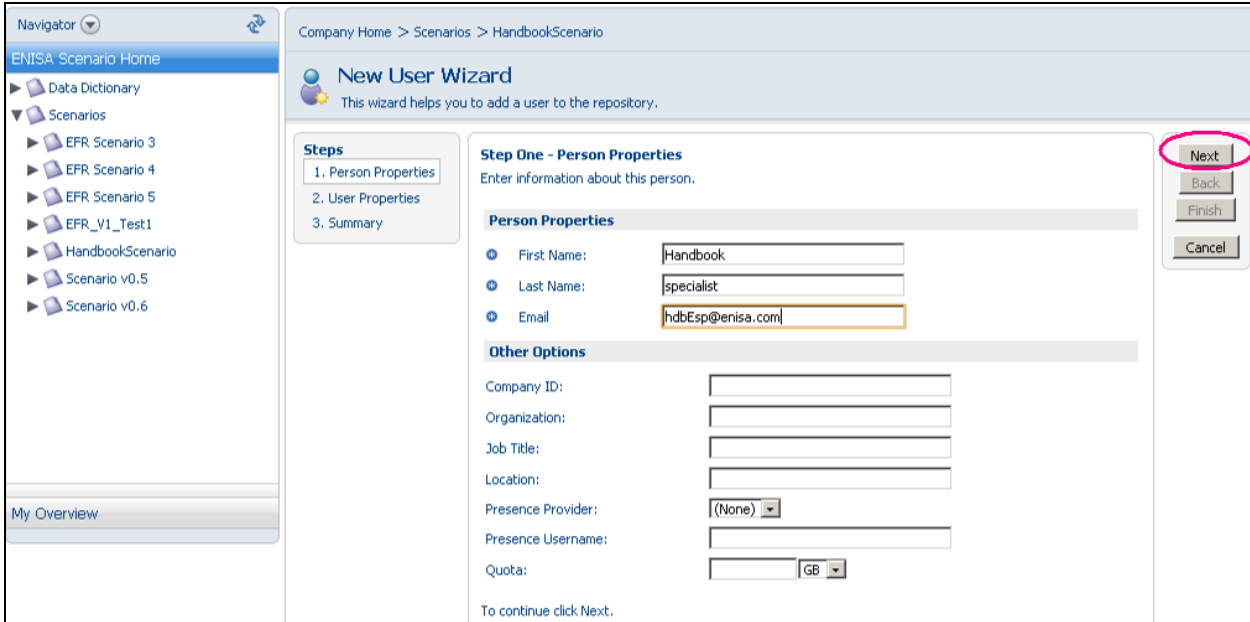
Figure 59: Person Properties

Second, the user properties need to be completed(Figure 59):
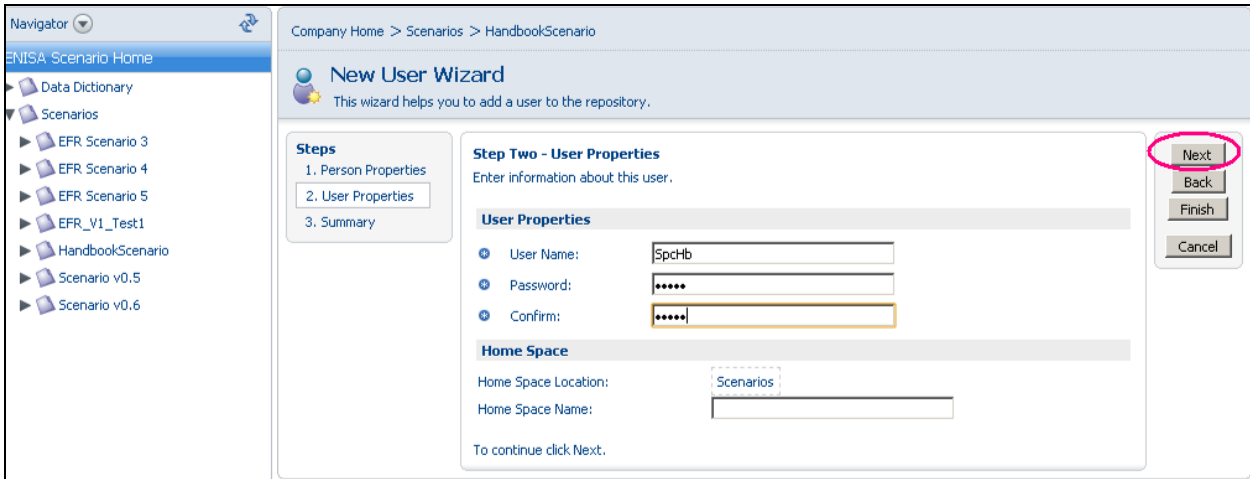
Figure 60: User properties

The last step provides a summary of the user details. The configuration is confirmed by clicking on "Finish".

Assignment of scenario roles

The EFR Administrator is further accountable for assigning scenario roles to the users. Assigning a role mean in the context of the EFR Collaboration Platform that a user is added to a specific user group of a specific scenario.

Please note, for a smooth functioning of the system, it is essential to create the scenarios first before assigning the scenario roles.

The "Administrative Console" is the starting point for the assignment. The EFR Administrator chooses "Manage User Group" as shown in the next screenshot:
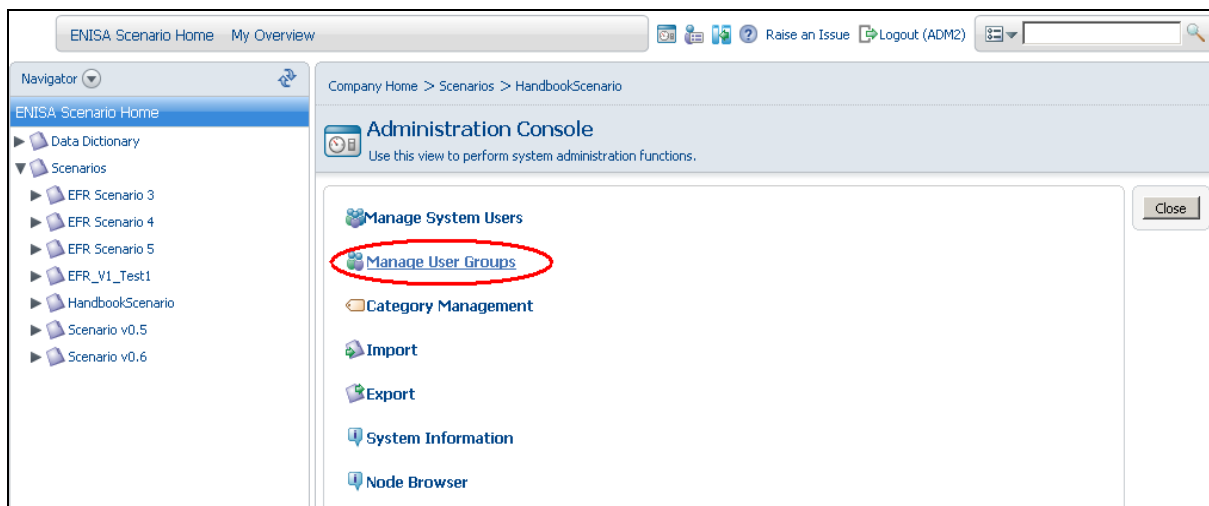
Figure 61: Manage User Groups

In order to assign a scenario role to a user, the EFR Administrator selects first the respective scenario from the root groups of the application.

It is crucial to remember that there are two special groups at the root level which should not be modified or deleted. The **Template Group** is a system group which should not be modified/deleted under any circumstances and the **Stakeholder Group** functions independently from the scenarios. Since there is only one common Stakeholder Forum for all scenarios, this group has been created previously on the platform and should remain unchanged.

Once the EFR Administrator has chosen the scenario, he can assign a user to one of the user groups by clicking on the "Add user" icon situated underneath the respective user group. In our example a new user is added to the "EFR Scenario 5 Finalization Matter Expert" group:

Figure 62: Add user to user group

Please note there is a second possibility to add a user to a user group. The administrator could also enter into the respective user group and choose from the "More Actions" drop down menu the option "Add user".

The next step is to search for the user you would like to add by clicking on "Search" and selecting the required user from the list by clicking on "Add". Confirm this step with the "OK" button.

Figure 63: Search and add user

Annex I - Email Notifications Chart

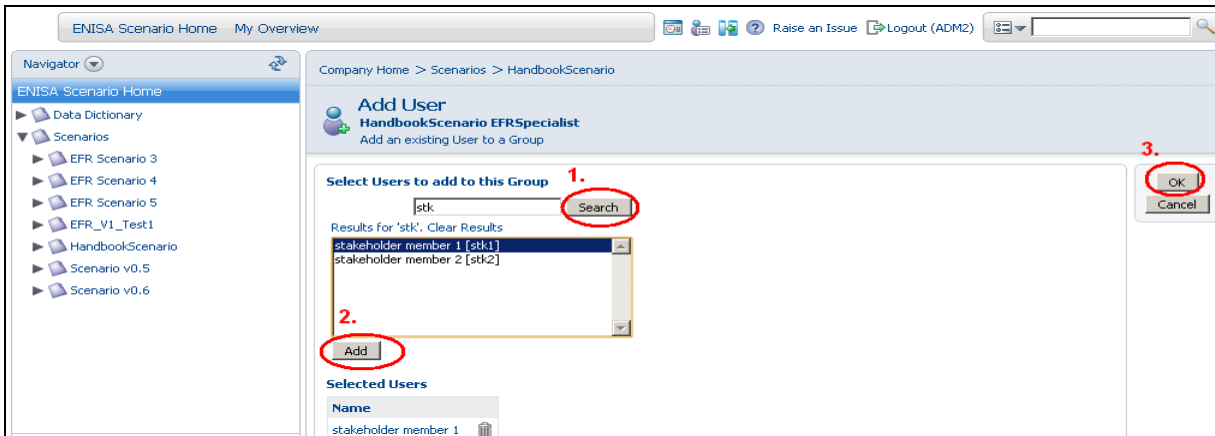| Phase	Event	Recipient	Description
Building	Working document uploaded	Specialist, Building Matter Experts, Building Validation Matter Experts	Notification about Building folder contributions send to Specialist, all Building Experts
Building	Working document uploaded	Specialists, Building Matter Experts	Notification about Building Draft folder send to Specialist, Building Matter Experts
Building	Working document uploaded	Specialists, Building Validation Experts, Stakeholders	Notification Building validation document send to Specialists, Building Validation Experts, Stakeholders
Building Validation	Scenario available	Stakeholders	Notification Building Pending acceptance document send to Stakeholders
Building Validation	Document submitted for approval	EFR Manager	Notification Building Pending acceptance document send to Manager
Building	Document accepted by EFR Manager	All groups involved in the Building phase except the EFR Manager Group	Notification Building document acceptance to building groups
Analysis	Working document uploaded	Specialist, Analysis Matter Experts, Analysis Validation Matter Experts	Notification about Analysis folder contributions send to Specialist, all Analysis Experts
Analysis	Working document uploaded	Specialist, Analysis Matter Experts	Notification about Analysis Draft folder send to Specialist, Analysis Matter Experts
Analysis	Working document uploaded	Specialists, Analysis Validation Matter Experts, Stakeholders	Notification Analysis validation document send to Specialists, Analysis Validation Experts, Stakeholders
Analysis validation	Scenario available	Stakeholders	Notification Analysis Pending acceptance document send to Stakeholders
Analysis Validation	Document submitted for approval	EFR Manager	Notification Analysis Pending acceptance document send to EFR Manager
Analysis	Document accepted by EFR Manager	All groups involved in the Analysis phase except the EFR Manager Group	Notification Analysis document acceptance to Analysis groups
Assessment	Working document uploaded	Specialist, Assessment Matter Experts, Assessment Validation Matter Experts	Notification about Assessment folder contributions send to Specialist, all Assessment Experts
Assessment	Working	Specialist,	Notification about Assessment

	document uploaded	Assessment Matter Experts	Draft folder send to Specialist, Assessment Matter Experts
Assessment	Working document uploaded	Specialists, Assessment Validation Matter Experts, Stakeholders	Notification Assessment validation document send to Specialists, Assessment Validation Experts, Stakeholders
Assessment validation	Scenario available	Stakeholders	Notification Assessment Pending acceptance document send to Stakeholders
Assessment Validation	Document submitted for approval	EFR Manager	Notification Assessment Pending acceptance document send to EFR Manager
Assessment	Document accepted by EFR Manager	All groups involved in the Assessment phase except the EFR Manager Group	Notification Assessment document acceptance to Assessment groups
Finalisation	Working document uploaded	Specialist, Finalisation Matter Experts	Notification about Finalisation folder contributions send to Specialist, Finalisation Matter Experts
Finalisation	Working document uploaded	Specialist, Finalisation Matter Experts	Notification about Finalisation Draft folder send to Specialist, Finalisation Matter Experts
Finalisation	Scenario available	Stakeholders	Notification Finalisation Pending acceptance document send to Stakeholders
Finalisation	Scenario submitted for approval	EFR Manager	Notification Finalisation Pending acceptance document send to EFR Manager
Finalisation	Scenario finalised	Specialist, Finalisation Matter Experts, Stakeholders , EFR Manager	Notification Finalisation Email send to all
Finalisation	Scenario finalized and ready to be stored	EFR Manager	Notification EFR Manager Project Finalization

Annex II - The Scenario log

Apart from the document history, which can be accessed through the "View details" option of the document, the EFR application generates a log of the performed actions which reflects the process evolvement. This is the case, whenever a Specialist or a Manager sends a working document from one step to another (e.g. the Specialist sends a working document for approval), a new line is added to the scenario log specifying the complete date and time of the operation, the user who performed it, the kind of operation, and the folders involved in the operation. There is a different log for each scenario, which is located in O.Administration > 0.2.logs in each scenario workspace.

The log file is the document log.csv. The next figure shows an example of the location of the file:
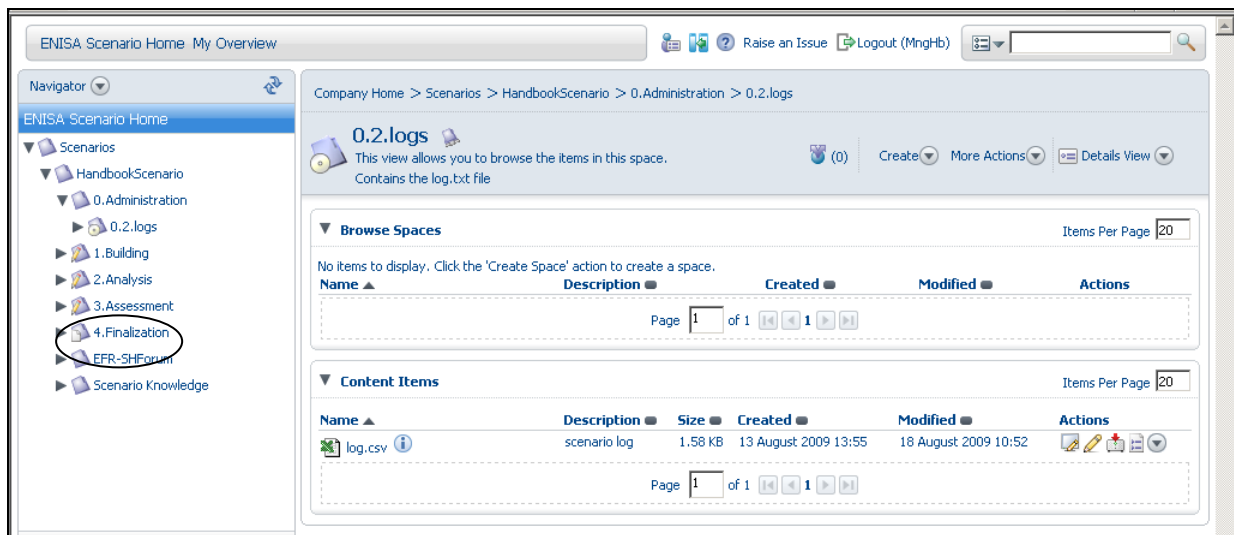
For security reasons, only Managers and System Administrators are allowed to see this file and the folder which contains it.

The log file is a csv file, a standard text file which separates the different fields by a special character, in this case the character ';'.

Spreadsheets applications, like MS Excel are able to open these kinds of files almost in the same way as any excel file because it interprets every field as an excel field. Therefore it is possible to show the file as an excel spreadsheet.

The next figure shows an example of the content of a log file and how it is opened by MS Excel:

	A	B	C	D	E	F
1	DateTime	User	Action	Document	Original folder	Final folder
2	Thu, 13 Aug 2009 17:57:59 GMT	Handbook specialist	entered folder	EFR scenario.doc		1.Building/1.1.Validation
3	Thu, 13 Aug 2009 17:57:59 GMT	Handbook specialist	uploaded document	EFR scenario.doc		1.Building/1.1.Validation
4	Tue, 18 Aug 2009 11:43:25 GMT	Handbook Manager	abandoned folder	EFR scenario.doc	1.Building/1.3.Accepted	
5	Tue, 18 Aug 2009 11:43:26 GMT	Handbook Manager	entered folder	EFR scenario.doc		2.Analysis/2.0.Draft
6	Tue, 18 Aug 2009 11:43:26 GMT	Handbook Manager	abandoned folder	EFR scenario.doc	2.Analysis/2.0.Draft	
7	Tue, 18 Aug 2009 12:05:32 GMT	Handbook specialist	abandoned folder	EFR scenario.doc	1.Building/1.1.Validation	
8	Tue, 18 Aug 2009 12:05:33 GMT	Handbook specialist	entered folder	EFR scenario.doc		1.Building/1.2.Pending Acceptance
9	Tue, 18 Aug 2009 12:05:33 GMT	Handbook specialist	uploaded document	EFR scenario.doc		1.Building/1.2.Pending Acceptance
10	Tue, 18 Aug 2009 12:06:47 GMT	Handbook Manager	abandoned folder	EFR scenario.doc	1.Building/1.2.Pending Ac	
11	Tue, 18 Aug 2009 12:06:48 GMT	Handbook Manager	entered folder	EFR scenario.doc		1.Building/1.3.Accepted
12	Tue, 18 Aug 2009 12:06:48 GMT	Handbook Manager	uploaded document	EFR scenario.doc		1.Building/1.3.Accepted
13	Tue, 18 Aug 2009 14:52:49 GMT	Handbook Manager	abandoned folder	EFR scenario.doc	1.Building/1.3.Accepted	
14	Tue, 18 Aug 2009 14:52:51 GMT	Handbook Manager	entered folder	EFR scenario.doc		2.Analysis/2.0.Draft
15	Tue, 18 Aug 2009 14:52:51 GMT	Handbook Manager	abandoned folder	EFR scenario.doc	2.Analysis/2.0.Draft	

Ready   log

Annex III – Email notifications

Description	**NOTIFY BUILDING FOLDER CONTRIBUTION to SPECIALIST, EXPERTS**
Recipients	Specialist, Experts
Subject	Phase: Building, Document uploaded
Body	Greetings. This notification is relevant to the Building phase of the EFR "Scenario Name". A new document "document.name" has been uploaded and it is available at http://enisa-server.atosorigin.es/alfresco/document.url Please take into account the new information provided by this document. Discussion on the contents of this document or other topics relevant to this scenario is available at "Building phase forum" Your contributions for this phase must be uploaded at: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please review the document and provide your opinion in the discussion forum of the building validation phase at "Building validation phase forum" You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY BUILDING DRAFT to SPECIALIST, BUILDING MATTER EXPERTS**
Recipients	Specialists, Building Matter Experts
Subject	Phase: Building, Working Document uploaded
Body	Greetings. You have been assigned to the phase Building of the EFR process "scenario name" A new Working Document "document.name" has been uploaded and it is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY BUILDING VALIDATION DOCUMENT TO SPECIALISTS, BUILDING VALIDATION EXPERTS AND SHF**
Recipients	Specialists, Building Validation experts and Stake holder forum members
Subject	Phase: Building, Working Document uploaded
Body	Greetings. You have been assigned to the phase Building.Validation of the EFR process "scenario name". The ENISA specialist has produced a new version (document.version) of the Document "document.name" The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please review the document and provide your opinion in the discussion forum of the building validation phase at "Building validation phase forum" You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY BUILDING PENDING ACCEPTANCE DOCUMENT TO STH Forum**
Recipients	STH Forum
Subject	Phase: Building validation, scenario available
Body	Greetings. This notification is relevant to the Building.Pending Acceptance phase of the EFR "Scenario Name". The ENISA specialist has produced a new version (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Please review the document and provide your opinion in the discussion forum of the building validation phase at "Building validation phase forum" Best regards. The EFR project.

Description	**NOTIFY BUILDING PENDING ACCEPTANCE DOCUMENT TO MANAGER**
Recipients	Manager
Subject	Phase: Building validation, scenario submitted for approval.
Body	Greetings. This notification is relevant to the Building Pending Acceptance phase of the EFR "Scenario Name". The ENISA specialist has produced a new version (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please allow some time for the rest of the reviewers to provide their opinion in the forum of the building validation phase at "Building discussion forum" In this phase, you are expected to accept or reject the consolidated document by choosing the appropriate option via the popup menu available in the document icon on the EFR application (note link above). Best regards. The EFR project.

Description	**NOTIFY BUILDING DOCUMENT ACCEPTANCE TO BUILDING GROUPS**
Recipients	All groups involved in the Building phase except the EFR Manager Group
Subject	Phase: Accepted: Document accepted by the EFR Manager
Body	Greetings. This notification is relevant to the Building phase of the EFR "Scenario Name". The ENISA EFR Manager has accepted the document (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Best regards. The EFR project.

ANALYSIS PHASE

Description	**NOTIFY ANALYSIS FOLDER CONTRIBUTION to SPECIALIST, EXPERTS**
Recipients	Specialist, Experts
Subject	Phase: Analysis, Document uploaded
Body	Greetings. This notification is relevant to the Analysis phase of the EFR "Scenario Name". A new document "document.name" has been uploaded and it is available at http://enisa-server.atosorigin.es/alfresco/document.url Please take into account the new information provided by this document. Discussion on the contents of this document or other topics relevant to this scenario is available at "Analysis phase forum" Your contributions for this phase must be uploaded at: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please review the document and provide your opinion in the discussion forum of the building validation phase at "Analysis validation phase forum" You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY ANALYSIS DRAFT to SPECIALIST, ANALYSIS MATTER EXPERTS**
Recipients	Specialists, Analysis Matter Experts
Subject	Phase: Analysis, Working Document uploaded
Body	Greetings. You have been assigned to the phase Analysis of the EFR process "scenario name" A new Working Document "document.name" has been uploaded and it is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY ANALYSIS VALIDATION DOCUMENT TO SPECIALISTS, ANALYSIS VALIDATION EXPERTS AND SHF**
Recipients	Specialists, Analysis Validation experts and Stake holder forum members
Subject	Phase: Analysis, Working Document uploaded
Body	Greetings. You have been assigned to the phase Analysis.Validation of the EFR process "scenario name". The ENISA specialist has produced a new version (document.version) of the Document "document.name" The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please review the document and provide your opinion in the discussion forum of the building validation phase at "Analysis validation phase forum" You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY ANALYSIS PENDING ACCEPTANCE DOCUMENT TO STH Forum**
Recipients	STH Forum
Subject	EFR "Scenario Name", Phase: Analysis validation, scenario available
Body	Greetings. This notification is relevant to the Analysis.Pending Acceptance phase of the EFR "Scenario Name". The ENISA specialist has produced a new version (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Please review the document and provide your opinion in the discussion forum of the building validation phase at "Analysis validation phase forum" Best regards. The EFR project.

Description	**NOTIFY ANALYSIS PENDING ACCEPTANCE DOCUMENT TO MANAGER**
Recipients	Manager
Subject	Phase: Analysis validation, scenario submitted for approval.
Body	Greetings. This notification is relevant to the Analysis Pending Acceptance phase of the EFR "Scenario Name". The ENISA specialist has produced a new version (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please allow some time for the rest of the reviewers to provide their opinion in the forum of the building validation phase at "Analysis discussion forum" In this phase, you are expected to accept or reject the consolidated document by choosing the appropriate option via the popup menu available in the document icon on the EFR application (note link above). Best regards. The EFR project.

Description	**NOTIFY ANALYSIS DOCUMENT ACCEPTANCE TO ANALYSIS GROUPS**
Recipients	All groups involved in the Analysis phase except the EFR Manager Group
Subject	Phase: Accepted: Document accepted by the EFR Manager
Body	Greetings. This notification is relevant to the Analysis phase of the EFR "Scenario Name". The ENISA EFR Manager has accepted the document (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Best regards. The EFR project.

ASSESSMENT PHASE

Description	**NOTIFY ASSESSMENT FOLDER CONTRIBUTION to SPECIALIST, EXPERTS**
Recipients	Specialist, Experts
Subject	Phase: Assessment, Document uploaded
Body	Greetings. This notification is relevant to the Assessment phase of the EFR "Scenario Name". A new document "document.name" has been uploaded and it is available at http://enisa-server.atosorigin.es/alfresco/document.url Please take into account the new information provided by this document. Discussion on the contents of this document or other topics relevant to this scenario is available at "Assessment phase forum" Your contributions for this phase must be uploaded at: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please review the document and provide your opinion in the discussion forum of the building validation phase at "Assessment validation phase forum" You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY ASSESSMENT DRAFT to SPECIALIST, ASSESSMENT MATTER EXPERTS**
Recipients	Specialists, Assessment Matter Experts
Subject	Phase: Assessment, Working Document uploaded
Body	Greetings. You have been assigned to the phase Assessment of the EFR process "scenario name" A new Working Document "document.name" has been uploaded and it is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY ASSESSMENT VALIDATION DOCUMENT TO SPECIALISTS, ASSESSMENT VALIDATION EXPERTS AND SHF**
Recipients	Specialist, Assessment Validation experts and Stake holder forum members
Subject	Phase: Assessment, Working Document uploaded
Body	Greetings. You have been assigned to the phase Assessment.Validation of the EFR process "scenario name". The ENISA specialist has produced a new version (document.version) of the Document "document.name" The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please review the document and provide your opinion in the discussion forum of the building validation phase at "Assessment validation phase forum" You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY ASSESSMENT PENDING ACCEPTANCE DOCUMENT TO STH Forum**
Recipients	STH Forum
Subject	Phase: Assessment validation, scenario available
Body	Greetings. This notification is relevant to the Assessment.Pending Acceptance phase of the EFR "Scenario Name". The ENISA specialist has produced a new version (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Please review the document and provide your opinion in the discussion forum of the building validation phase at "Assessment validation phase forum" Best regards. The EFR project.

Description	**NOTIFY ASSESSMENT PENDING ACCEPTANCE DOCUMENT TO MANAGER**
Recipients	Manager
Subject	Phase: Assessment validation, scenario submitted for approval.
Body	Greetings. This notification is relevant to the Assessment Pending Acceptance phase of the EFR "Scenario Name". The ENISA specialist has produced a new version (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please allow some time for the rest of the reviewers to provide their opinion in the forum of the building validation phase at "Assessment discussion forum" In this phase, you are expected to accept or reject the consolidated document by choosing the appropriate option via the popup menu available in the document icon on the EFR application (note link above). Best regards. The EFR project.

Description	**NOTIFY ASSESSMENT DOCUMENT ACCEPTANCE TO ASSESSMENT GROUPS**
Recipients	All groups involved in the Assessment phase except the EFR Manager Group
Subject	Phase: Accepted: Document accepted by the EFR Manager
Body	Greetings. This notification is relevant to the Assessment phase of the EFR "Scenario Name". The ENISA EFR Manager has accepted the document (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Best regards. The EFR project.

FINALIZATION

Description	**NOTIFY FINALIZATION FOLDER CONTRIBUTION to SPECIALIST, EXPERTS**
Recipients	Specialist, Experts
Subject	EFR "Scenario Name", Phase: Finalization, Document uploaded
Body	Greetings. This notification is relevant to the Finalization phase of the EFR "Scenario Name". A new document "document.name" has been uploaded and it is available at http://enisa-server.atosorigin.es/alfresco/document.url Please take into account the new information provided by this document. Discussion on the contents of this document or other topics relevant to this scenario is available at "Finalization phase forum" Your contributions for this phase must be uploaded at: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please review the document and provide your opinion in the discussion forum of the building validation phase at "Finalization validation phase forum" You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY FINALIZATION DRAFT to SPECIALIST, FINALIZATION MATTER EXPERTS**
Recipients	Specialists, Finalization Matter Experts
Subject	Phase: Finalization, Working Document uploaded
Body	Greetings. You have been assigned to the phase Finalization of the EFR process "scenario name" A new Working Document "document.name" has been uploaded and it is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Best regards. The EFR project.

Description	**NOTIFY FINALIZATION PENDING ACCEPTANCE DOCUMENT TO STH Forum**
Recipients	STH Forum
Subject	Phase: Finalization validation, scenario available
Body	Greetings. This notification is relevant to the Finalization.Pending Acceptance phase of the EFR "Scenario Name". The ENISA specialist has produced a new version (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace You can access and upload other relevant information to this scenario at "Scenario Knowledge" workspace. Please review the document and provide your opinion in the discussion forum of the building validation phase at "Finalization validation phase forum" Best regards. The EFR project.

Description	**NOTIFY FINALIZATION PENDING ACCEPTANCE DOCUMENT TO MANAGER**
Recipients	Manager
Subject	Phase: Finalization validation, scenario submitted for approval.
Body	Greetings. This notification is relevant to the Finalization Pending Acceptance phase of the EFR "Scenario Name". The ENISA specialist has produced a new version (document.version) of the scenario.doc. The document is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Please allow some time for the rest of the reviewers to provide their opinion in the forum of the building validation phase at "Finalization discussion forum" In this phase, you are expected to accept or reject the consolidated document by choosing the appropriate option via the popup menu available in the document icon on the EFR application (note link above). Best regards. The EFR project.

Description	**NOTIFY ALL FINALIZATION EMAIL**
Recipients	Experts, Specialist, STH Forum, Manager
Subject	Scenario finalized
Body	Greetings. The scenario of the EFR Process "Scenario Name" has been approved and released. and it is available at http://enisa-server.atosorigin.es/alfresco/document.url or through the application: http://enisa-server.atosorigin.es/alfresco/navigate/browse/document.workspace Thank you for your collaboration. Best regards. The EFR project.

Description	**NOTIFY MANAGER PROJECT FINALIZATION**
Recipients	Manager
Subject	A scenario has been finalized and is ready for storing
Body	Greetings. The EFR process "ScenarioName" has been finalized. You may now store the resulting documents into the common repository. Best regards. The EFR project.