TRANSITIONS PATHWAYS AND RISK ANALYSIS FOR CLIMATE CHANGE MITIGATION AND ADAPTATION STRATEGIES

D1.1 Data Management Plan

Project Coordinator: SPRU, Science Policy Research Unit, (UoS) University of Sussex

Work Package 1 Leader Organization: SPRU

Contributing authors: Ed Dearnley (SPRU)

<table>
<tr><td colspan="4" align="center">Version Control (delete before submission)</td></tr>
<tr><td>Version Number</td><td>Author(s)</td><td>Purpose/ Change</td><td>Date</td></tr>
<tr><td>0.1</td><td>Ed Dearnley</td><td>Initial document created.</td><td>20/01/16</td></tr>
<tr><td>0.2</td><td>Ed Dearnley</td><td>Draft for internal consultation. Includes additions to cover data integrity and archiving.</td><td>28/01/16</td></tr>
<tr><td>0.3</td><td>Ed Dearnley</td><td>Comments and suggestions from consultation incorporated.</td><td>17/02/16</td></tr>
<tr><td>0.4</td><td>Jenny Lieu</td><td>Added in table of models- light edit</td><td>24/02/16</td></tr>
<tr><td>1.0</td><td>Ed Dearnley</td><td>Final deliverable for submission</td><td>24/02/16</td></tr>
</table>

February 2016

TRANSrisk

Transitions pathways and risk analysis for climate change mitigation and adaptation strategies

GA#: 642260

Funding type: RIA

Deliverable number (relative in WP)	D1.1
Deliverable name:	Data Management Plan
WP / WP number:	1
Delivery due date:	Project Month 6 (29/02/16)
Actual date of submission:	26/02/16
Dissemination level:	Public
Lead beneficiary:	SPRU
Responsible scientist/administrator:	Ed Dearnley (SPRU)
Estimated effort (PM):	0.2
Contributor(s):	Christos Ntanos (UPRC), Tim Suljada (SEI), Wytze van der Gaast (JIN)
Estimated effort contributor(s) (PM):	0.05
Internal reviewer:	Chara Karakosta (UPRC), Andreas Tuerk (Uni Graz), Jenny Lieu (SPRU)

Preface

Both the models concerning the future climate evolution and its impacts, as well as the models assessing the costs and benefits associated with different mitigation pathways face a high degree of uncertainty. There is an urgent need to not only understand the *costs and benefits* associated with *climate change* but also the *risks, uncertainties and co-effects* related to different *mitigation pathways* as well as *public acceptance* (or lack of) of low-carbon (technology) options. The main aims and objectives of TRANSrisk therefore are to create a novel assessment framework for analysing costs and benefits of transition pathways that will integrate well-established approaches to modelling the costs of resilient, low-carbon pathways with a wider interdisciplinary approach including risk assessments. In addition *TRANSrisk* aims to design a decision support tool that should help policy makers to better understand uncertainties and risks and enable them to include risk assessments into more robust policy design.

PROJECT PARTNERS

No	Participant name	Short Name	Country code	Partners' logos
1	Science Policy Research Unit, University of Sussex	SPRU	UK	
2	Basque Centre for Climate Change	BC3	ES	
3	Cambridge Econometrics	CE	UK	
4	Energy Research Centre of the Netherlands	ECN	NL	
5	Swiss Federal Institute of Technology (funded by Swiss Gov't)	ETH Zurich	CH	
6	Institute for Structural Research	IBS	PL	
7	Joint Implementation Network	JIN	NL	
8	National Technical University of Athens	NTUA	GR	
9	Stockholm Environment Institute	SEI	SE, UK, KE	
10	University of Graz	UniGraz	AT	
11	University of Piraeus Research Centre	UPRC	GR	
12	Pontifical Catholic University of Chile	CLAPESUC	CL	

Table of Contents

1   INTRODUCTION

1.1   Changes with respect to the DoA

There are no changes from the DoA.

1.2   Introduction to the Data Management Plan

This Data Management Plan outlines how research data will be handled during the lifetime of the TRANSrisk project, and after the project is completed. TRANSrisk participates in the Horizon 2020 Open Research Data Pilot, and this plan has, therefore, been prepared under the principal that open access will be provided to research data, unless there are ethical or confidentiality issues that prevent us doing so.

The Data Management Plan is a living document, and will be reviewed at least twice over the lifetime of the TRANSrisk project. These reviews will reflect the scientific outputs and supporting datasets created as the project progresses.

General procedures for managing all data created during TRANSrisk are detailed in section 2 of this plan. Specific datasets that we anticipate will be created during TRANSrisk are detailed in section 3, alongside their associated data management procedures.

2   GENERAL PROCEDURES FOR DATA MANAGEMENT

The following general procedures will apply to all data created as part of TRANSrisk.

2.1   Internal Data Management

All project data (with some exceptions) will be stored and managed on a project specific implementation of the Alfresco Community document management system during the lifetime of the TRANSrisk project. This system has been implemented and managed by the National Technical University of Athens (NTUA). Exceptions are:

- Stakeholder engagement documents (see 3.1). These documents will be stored and managed using a dedicated system. This system is currently being specified.
- Modelling input files (see 3.3). These will be stored on the internal IT systems of each partner engaged in modelling activities.

2.2   General Standards and Metadata

Common guidelines for document management in TRANSrisk have been drawn up as part of a TRANSrisk project manual, and are included as Appendix A of this Data Management Plan. These guidelines include:

- File types.
- File naming conventions.
- Version control.
- File and folder organisation guidelines (for the document management system).

2.3   Data Backup

All TRANSrisk data will initially be stored in a project specific implementation of the Alfresco Community document management system. The Alfresco server used has full version control and a backup of previous versions (full backups rather than differential), as well as retaining a backup copy for every deleted or overwritten piece of content in its repository. This allows instant recovery of documents either through the Alfresco interface or the administration interface.

The TRANSrisk implementation of Alfresco is located on a Windows Server 2008 R2 Datacenter Hyper-V Virtual Machine, on a Dell Poweredge R710 Server owned and operated in the EPU-NTUA premises. Data redundancy on a server-wide scale is achieved by the use of four SAS 600GB hard disk drives on a RAID 10 configuration - this ensures that no data is lost if one drive fails. Offsite backups of the server are taken on a weekly basis.

More information about Alfresco can be found at the Alfresco website[1].

2.4   Distribution, Archiving and Preservation

All TRANSrisk data will be made freely available, with some exceptions as noted in section 3 of this Data Management Plan. Data will be released under a Creative Commons 'BY' license, which allows free use of the released data under the condition that data is attributed to the original author.

Data will initially be distributed through the TRANSrisk public website. The website is managed by the National Technical University of Athens, who have committed to maintaining the website for 2 years after the formal end of project.

Data will be archived in the Zenodo data repository[2], and may also be deposited in a data repository under development at the University of Sussex (the project coordinator). Due to the multi-disciplinary nature of TRANSrisk's work we have not identified any discipline specific repositories to deposit data, however this will be kept under review as the project progresses.

In addition to the above, the University of Sussex, as project coordinator, is in consultation with a number of other EU FP7 and Horizon2020 projects about setting up a common platform for posting project outputs[3].

---

[1]   See https://www.alfresco.com/solutions/document-management

[2]   See https://zenodo.org

[3]   Working title, "Climate Change Mitigation (subtitle: EU platform about research for climate change mitigation)". As per February 2016, consultations have taken place with CARISMA (Horizon 2020), which have, at their turn, established contacts with the EU-funded projects ADVANCE, PATHWAYS and CD Links.

3 DESCRIPTIONS AND PROCEDURES FOR TRANSRISK DATASETS

We have identified three broad categories of dataset that will be produced during TRANSrisk's research and dissemination activities.

3.1 Stakeholder Engagement Outputs

3.1.1 Data set description

This dataset consists of outputs from stakeholder workshops and individual stakeholder interviews. The main data outputs will be:

- Interviews / workshop audio recordings[4]. Audio files, MB file sizes.
- Interviews / workshop transcripts and minutes. Text files, KB files sizes.
- Interviews / workshop images (flipcharts, whiteboards, posters). Image files, MB file sizes.
- Online and telephone survey data (KB). Tabular data files, KB file sizes.
- Written summaries of stakeholder engagement. Text and image files, KB and MB files sizes.

Guidance on the electronic file types to be used is provided in the TRANSrisk project manual document 'Guidelines for Document Management in TRANSrisk', which is included as Appendix A of this Data Management plan.

Stakeholder engagement data will underpin the TRANSrisk country case studies, which in turn will inform scientific paper outputs.

3.1.2 Standards and metadata

Common guidelines for standards and metadata in TRANSrisk are described in section 2.2.

Metadata is 'data about data', or information that describes the content of a document. Metadata will be created both automatically and through user input as part of the system used for document management in TRANSrisk. Open access data from this dataset will include associated metadata (authors, dates, versions, tags, etc.), and a data catalogue will be created to aid discoverability.

---

[4] Note that not all interviews and workshops will be recorded in TRANSrisk – it is an option for researchers rather than a requirement.

3.1.3   Data sharing

Use of the raw data produced by stakeholder engagement is described in the TRANSrisk Ethics Requirements, document D1.2. This states that, *'The data – including interview recordings, notes, survey responses and comments from stakeholder workshops – will be stored in accordance with UK data protection requirements and we will ensure that no identifiable data will be stored longer than required. After the completion of the research the data will be destroyed'*. This raw stakeholder data will be restricted access, available only to relevant TRANSrisk researchers. Anonymising this data is possible, but this is unfeasible due to the volume of data that is likely to be produced.

Processed or compiled data (which does not name individuals) from stakeholder engagement will, however, be made publicly available. This will take place using the processes described in section 2.4.

3.1.4   Archiving and preservation

Common guidelines for archiving and preservation in TRANSrisk are described in section 2.4.

It is anticipated that the volume of stakeholder engagement output data archived will be less than 1GB, and consist mainly of PDF and .docx documents.

3.2   Modelling Inputs and Outputs

3.2.1   Data set description

TRANSrisk will use a suite of energy system models, soft coupled to macroeconomic models. The data relating to these models falls into two broad categories:

- Model inputs. Historical economic, social, demographic and environmental data used to baseline and calibrate the models. Tabular data and databases, GB files sizes.
- Model outputs. Documents describing the results of the modelling. Tabular data, text and image files, MB file sizes.

Note that the models themselves could also be considered research data. Some of the models used are open source and are free to download and use, whilst others are proprietary models that are commercially confidential. Standards and metadata

Model inputs – model inputs are drawn from a wide variety of sources, for example Eurostat, OECD, National Statistics Offices, EU databases and IMF databases. Short summaries of the model and a data dictionary will be created for each model used in TRANSrisk, which will be made publicly available. See Table 1 for a list of the datasets used in the models

Table 1: List of databases used in models for TRANSrisk

Databases used in models	Publically assessable	Paid subscription (restricted access)
BGR (Federal Institute for Geosciences and Natural Resources)	Y	
EDGAR (SEC- Company Filings)	Y	
EPA (European Environment Agency)	Y	
European Commission stats e.g. Eurostats, AMECO	Y	
GTAP (Global Trade Analysis Project)		Y
IEA (International Energy Agency)	Y	
IIASA-SSP (International Institute for Applied System Analysis database Shared Socioeconomic Pathways	Y	
IMF (International Monetary Fund)	Y	
IRENA (The International Renewable Energy Agency)	Y	
National statistics	Y	
OECD (Organisation for Economic Co-operation and Development)	Y	
United Nations data bases including: UN-ESA, UNDP, FAO	Y	
USGS (U.S. Geological Survey)	Y	
World Bank	Y	

Model outputs – model outputs will follow the common document management standards for TRANSrisk, as described in section 2.2 of this Data Management Plan.

Where the models themselves are open source, the metadata will also include links to the model's download and documentation web pages.

3.2.2   Data sharing

Model inputs – model input files will not be publicly shared by TRANSrisk, however a data dictionary will be created for each model to detail what data inputs each model uses, including links to the dataset where these are in the public domain. The reason for not (directly) sharing these files is that, in most cases, they are not outputs of the project (they are created by other bodies) and also that the file sizes can be very large (GBs).

Model outputs – model outputs will be made available initially through the TRANSrisk internal document management system, and later on the TRANSrisk public website via the "TRANSrisk Models" webpage[5].

3.2.3   Archiving and preservation

Model outputs will follow the common standards for archiving TRANSrisk data, as described in section 2.4 of this Data Management Plan.

It is anticipated that the volume of data archived will be between 1 and 5GB, and consist mainly of PDF, .docx and tabular data documents.

3.3   Project Output Papers

3.3.1   Data set description

Output papers will be the main outputs of TRANSrisk's scientific and communications work. They include (but are not limited to):

- Project deliverables.
- Scientific publications.
- Conference and workshop presentations.
- Working papers.
- Commentaries.
- Policy Briefs.
- Online Articles.
- Press Releases.
- Newsletters.
- Leaflets/ Flyers.
- Posters.
- Videos.
- Info-graphics.

3.3.2   Standards and metadata

Output papers will follow the common document management standards for TRANSrisk, as described in section 2.2 of this Data Management Plan.

---

[5] See http://transrisk-project.eu/content/transrisk-models

Scientific publications deposited in a repository(s) will include bibliographic metadata, which will follow the format provided by Horizon 2020 guidance, namely:

- The terms "European Union (EU)" and "Horizon 2020".
- The name of the action, acronym and grant number.
- The publication date, and length of embargo period if applicable.
- The authors.
- A persistent identifier.

3.3.3   Data sharing

Project output papers will be made available initially through the TRANSrisk internal document management system, and later on the TRANSrisk public website (see section 2.4). Planned arrangements include:

- Project deliverables with public access will be available via the "TRANSrisk results"[6] webpage, which is included in the "Virtual Library" section of the website.
- Conference and workshop presentations will be uploaded to the "Events" section of the website[7].
- Dissemination material (newsletters, press releases, leaflets/ flyers, videos etc.) distributed or presented in internal and external events will be also be made available via the same webpage.

Scientific publications that are derived from the project will be offered to either open access journals or peer-review journals which offer open access with delay. They will also be placed in a repository at the same time as publication (see section 2.4) with open access either offered immediately (if copyright allows) or after an embargo period of no longer than 6 months. Where copyright allows they will also be made available through the TRANSrisk public website.

3.3.4   Archiving and preservation

Project output papers will follow the common standards for archiving TRANSrisk data, as described in section 1.4 of this Data Management Plan. Where copyright allows, this will include scientific publications.

It is anticipated that the volume of data archived will be between 1 and 5GB, and consist mainly of PDF, .docx, and tabular data documents.

---

[6] See http://transrisk-project.eu/content/transrisk-results
[7] See http://transrisk-project.eu/recent-events

Appendix A

TRANSITIONS PATHWAYS AND RISK ANALYSIS FOR CLIMATE CHANGE MITIGATION AND ADAPTATION STRATEGIES

Project Manual: Section 4

Guidelines for Document Management in TRANSrisk

1   Introduction

1.1   Purpose of This Document

This document provides guidance to TRANSrisk partners on how project documents should be produced, named, organised and managed. It assumes readers are familiar with the Alfresco Enterprise Content Management System used for TRANSrisk – if you are not familiar with this, please read section 5 of the project manual (Alfresco User Guide) first.

This document forms part of the TRANSrisk project manual.

1.2   Why is Document Management Important?

TRANSrisk will produce a large number of documents, for example deliverables, scientific papers, working documents, meeting notes, etc. Many of these documents will be worked on by a number of different project partners. It is therefore essential that all partners are able to find, identify and access the documents they need, and can collaborate with partners on document development in a structured way.

TRANSrisk has a commitment to open data as part of the grant agreement, which includes a long term commitment to data availability. Researchers from outside of the TRANSrisk partnership may therefore be accessing and using our documents for a number of years to come. This again means that documents need to be well organised, identifiable and accessible.

2   SUMMARY OF DOCUMENT MANAGEMENT IN TRANSRISK

When you begin to work on a document please follow the document management process outlined in figure 1:

Figure 1 – The TRANSrisk Document Management Process

Create
- Use the templates provided in order to create a new document, if appropriate (3.1).
- Consider whether you need to implement version control (3.2).
- Add and format metadata, if necessary (3.3).

Save
- Save your document using a common file type (4.1).
- Name your document using the TRANSrisk naming structure (4.2).

Upload
- Check if an older version of your document already exists on Alfresco. If it does, overwrite it (5.1).
- Consider where (in what folder) your document needs to be saved in Alfresco. If necessary, create a new sub-folder for it (5.2).
- Correct the name, and add a description, author and appropriate tags to your document on Alfresco (5.3).

Edit
- Lock documents on Alfresco whilst you are editing them (6.1).
- Do not leave files locked for longer than you need to edit them. If you have to stop editing upload a draft version and unlock the file for others to use (6.1).

3   CREATE

3.1   Templates

A number of templates have been created for TRANSrisk documents, e.g. templates for deliverables, presentations, etc. Please use these templates, as they ensure TRANSrisk documents share a common visual identity. They templates are available on Alfresco (link).

3.2   Version Control

Important documents should use version control. This allows development of the document to be tracked and the current status of a document to be easily identified. A document should use version control if:

- It is a deliverable, or other key output of a work package.
- If it is a key document for any part of TRANSrisk, for example project guidance.
- It there will be significant collaboration on the final document, i.e. there will be several different versions before the final document is produced.

If a document is short, produced by a single author and/or unlikely to be revised then it does not need to use version control.

If you use version control, please do the following:

- Include the version number in the document file name (see section 4.2) and/or;
- Include a version control table in your document (see figure 2 below):
    - o For text document place the table on the first page.
    - o For Excel spreadsheets place the table in a separate tab named 'About'.

For simple and/or short documents you may simply use version control in the file name, whilst longer documents should use a version control table.

The version number should follow the following format:

- Draft versions of the document should be numbered 0.1, 0.2, 0.3, etc.
- The final version of the document should be numbered 1.0.
- Minor revisions of the document should be numbered 1.1, 1.2, 1.3, etc.
- Major revisions of the document should be numbered 2.0, 3.0, etc.

Figure 2 – An Example of a Version Control Table

Version Number	Author(s)	Purpose/ Change	Date
0.1	Ed Dearnley	Initial document produced	09/12/15
0.2	Jenny Lieu	Updated/ corrected content	12/12/15
0.3	Ed Dearnley	Final draft for consultation	15/12/15
1.0	Ed Dearnley	Final approved version	06/01/16
1.1	Jenny Lieu	Revised to reflect new project roles	25/03/16

3.3   Metadata

Metadata is 'data about data', or information that describes the content of a document. Under the TRANSrisk grant agreement we have a commitment to open data, and all but the most basic documents should be created with an assumption that a researcher from outside of TRANSrisk may need to quickly understand the content and context of a document.

Text documents created using TRANSrisk templates are unlikely to need any additional metadata, and any (other) text documents that have an executive summary and use version control are also likely to have sufficient metadata. Some other document types may, however, need additional metadata. Examples include:

- Tabular data (spreadsheet) files should have an additional 'notes' or readme' tab containing a brief description of the file contents, plus any version control information.
- Audio, video and image files should be accompanied with a 'readme' text file the briefly explains the context of the files (for example when, why and by whom the files were created).

Some scientific disciplines have their own recommended standards for metadata. Guidance for how these standards apply for TRANSrisk is being sought, and this guide will be updated as necessary.

4   SAVE

4.1   File Types

Files used in TRANSrisk documents should be commonly used or open file types. If the file uses compression (e.g. audio or visual files) this should ideally be lossless compression. Examples are:

- Text documents – Microsoft Word (.doc or .docx), Rich Text Format (.rtf) or PDF (.pdf).
- Tabular data – Microsoft Excel (.xls or .xlsx) or Comma Separated Values (.csv).
- Images – TIFF (.tif) or PNG(.png)[8] with losseless compression.
- Audio - Free Lossless Audio Codec (FLAC) (.flac) or WAV (.wav)[9].
- Video - MPEG-4 (.mp4).

Using these file types helps to ensure that both current and future users of the data will be able to access documents produced by TRANSrisk. Some other file types may only be accessible using specialist software that may not be available in years to come. A full list of acceptable file types can be seen on the UK Data Achieve website (link).

4.2   File Names

It is important that documents are clearly named so partners can easily identify what the document is, what version it is and when it was produced. To do so please use the following structure for naming documents:

- (Deliverables only) Deliverable number. If a document is a deliverable please start with the number of the deliverable, e.g. 'D.1.2.'.
- Title of the document. Please use a concise, descriptive name and replace spaces with underscores.
- Status of the document. This can be:
    - (DRAFT) The document is still being worked upon.
    - (FINAL) This is the final version of the document.
    - (SUBMITTED) For deliverables only, this is the submitted version of the document.

---

[8] JPEG (.jpeg or .jpg) can be used if the file was created in this format, e.g. outputted from a digital camera.
[9] MP3 can be used if the file was created in this format, e.g. outputted from a Dictaphone.

- (<u>Documents using version control only</u>) Version number.
- Date the document was produced. Please add the date in 'Day Month Year' format, e.g. 301215.

Examples of documents named using this structure could be:

- 'D.1.2.Ethics_Requirements(SUBMITTED)_v1.0_251115'.
- 'TRANSrisk_Management_Board_Meeting_Notes(FINAL)070215'.

Note that you can change the name of a file once it's been uploaded to Alfresco by clicking on 'Edit Properties'. Editing the name does not break links to the document that you (or anyone else) might have sent out.

Also note that Alfresco adds its own version numbers to documents updated on the site, i.e. initially documents will be listed as version '1.0' and updated to '1.1' or '2.0' when a new version is uploaded. However, it is still important to add dates and (if necessary) version numbers, as documents need to be identifiable outside of the Alfresco system.

5   UPLOAD

5.1   Checking Whether a File Already Exists on Alfresco

Before you upload a document please check to make sure a previous version of the document is not already in the Document Library. If it is, overwrite the previous version - please do not upload multiple versions of the same document with different names. Alfresco keeps old versions of documents when a new version is uploaded, so it is possible to access the older versions even if they are overwritten.

5.2   Choosing a Folder

Documents need to be logically arranged within the Document Library. Please familiarise yourself with the sub-folder structure within your work package folder and:

- If an existing folder is suitable for your file please use it.
- If a new folder is needed please create it, giving it a concise, descriptive name.

Please do not add additional folders to the top level (work package folders) and second level (deliverables folders) of the Document Library without seeking agreement of the Project Manager (top level) or Work Package Leader (second level).

5.3   Adding a Description, Author and Tags

Once your file has been uploaded to Alfresco please click on 'edit properties' and:

If replacing an existing file:

- Correct the file name. Alfresco keeps the original name of the file you have replaced, so please correct this to show the file has been updated.

If uploading a new file:

- Write a concise description of the document's contents.
- Ensure you are listed as the author.
- Add tags appropriate to the content of the document.

Tags are words or phrases that describe the content of the document. Tags serve two functions in Alfresco: firstly they aid the search function (e.g. if a document is tagged 'deliverable' it will come up when someone searches for 'deliverable') and secondly they are displayed alongside a document therefore providing a quick overview of content.

Clicking on the tags button brings up a list of tags that have been used in previous documents. You can also add your own (please look at the list of existing tags before adding your own tags). When adding tags please use the following guidelines:

- Does the document relates to a particular work package or deliverable please tag it as such (for example, 'd.1.1', 'wp2')?
- Does the document relate to any TRANSrisk working groups (for example, does it involve 'work package leaders', the 'management board', the 'European commission', etc)?
- What kind of document is it (for example, is it a 'briefing', a 'deliverable', a 'presentation', 'working paper', etc)?
- What kind of activity does the document relate to (for example, a 'workshop', 'teleco', 'stakeholder' event, 'model', etc)?
- Finally, what kind of product does the document cover (for example, is it a 'case study', the 'ethics requirements' or the project 'manual')?

A list of tags on Alfresco at the time of writing is shown in figure 3, however please feel free to add your own tags if there are no suitable tags already. When adding your own tags please keep them short (no long phrases) and make sure they are spelt correctly.

Figure 3 – Tags on Alfresco, February 2016

Work package	Deliverable	TRANSrisk Group	Document Type	Activity Type	Product Type
WP1	D1.1	consortium	briefing	call	case study
WP2	D1.2	european commission	data	meeting	document management
WP3	D2.1	management board	deliverable	milestone	ethics requirements
WP4	D2.2	partnership	email	qualitative	grant agreement
WP5	D2.3	scientific advisory board	guidance	quantitative	manual
WP6	D2.4	work package leaders	journal	stakeholder	model
WP7	D2.5		mailing list	telco	subcontract
WP8	D3.1		newsletter	workshop	
	D3.2		note		
	D3.3		presentation		
	D4.1		template		
	,etc.		working paper		

Figure 4 – Adding a Description, Author and Tags to an Alfresco Document

6   EDIT

6.1   Locking and Unlocking a Document

If two or more people are working on a document at the same time there is a risk that changes made by one person can be overwritten by another person. For this reason Alfresco has the ability to lock a document whilst you are working on it. Please always use the locking function if you intend to edit a document on Alfresco.

To lock a document, open it on Alfresco and click 'edit offline' (see figure 5). The document will be downloaded to your computer and other Alfresco users accessing the document will see that it has been locked by you. Once you've finished your edits upload the new version of the document.

Figure 5 – Locking a Document Using 'Edit Offline'
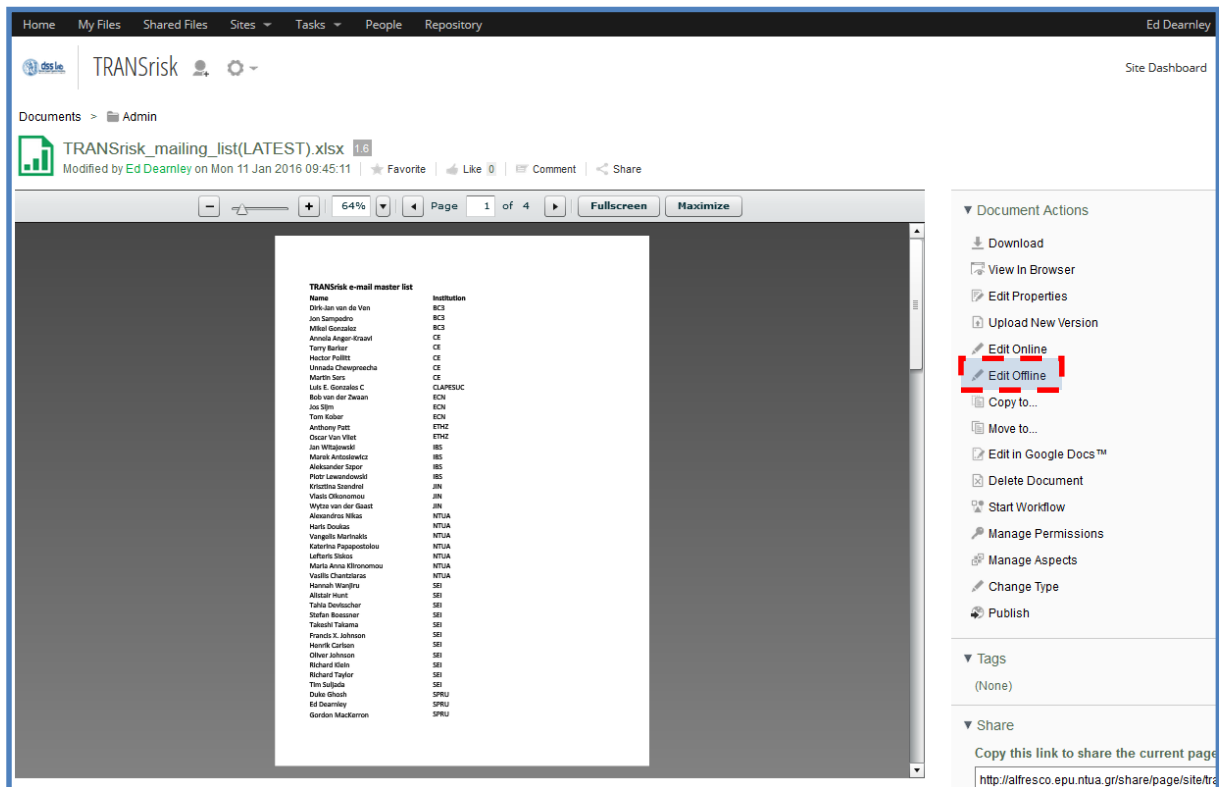
Please do not leave documents locked for longer than absolutely necessary. If you have not finished your edits by the time you leave at the end of the working day, leave for a meeting, etc please upload a temporary 'work in progress' document to Alfresco.

If you change your mind and do not need to make any edits to the document, return to the document on Alfresco and click 'cancel editing'.

7 ASSISTANCE

If you need assistance with this guidance please contact Ed Dearnley (TRANSrisk Project Manager) on:

- Email - e.dearnley@sussex.ac.uk
- Phone – (+44) 1273 877983
- Skype - ed.dearnley.work