



# PROTAGE Final Demonstrations

## Test Scenarios

Lead Editors: Magnus Geber, Robert Sjökvist (RA)

Version: Draft

Dissemination level: Public

SEVENTH FRAMEWORK PROGRAMME THEME  
ICT -1-4.1 Digital libraries and technology-enhanced learning

Project full title: PReservation Organizations using Tools in AGent Environments

Grant agreement no.: 216746



## Table of Contents

Introduction.....	3
1. Scenario 1: Creating a new collection .....	4
2. Scenario 2: Selecting friends .....	5
3. Scenario 3: Searching for action plans from your local repository and from the access point .....	6
4. Scenario 4: Searching for action plans from other users .....	7
5. Scenario 5: Executing an action plan.....	9
6. Scenario 6: Using the migration support agent .....	10
7. Scenario 7: Creating a new action plan.....	11
8. Scenario 8: Advanced search, Profile Search .....	12
9. Scenario 9: Advanced search, AP Preference .....	14
10. Scenario 10: Advanced search, Trust Search, Who to ask.....	15
11. Scenario 11: Advanced search, Trust Search, What AP to get back .....	16
12. Technical support.....	18

# Introduction

The test scenarios described in this document present the main functionality currently available in PROTAGE final system client application. For testing purposes we have identified eleven scenarios that we ask you to go through:

- Creating a new collection
- Selecting friends
- Searching for action plans in your local repository and from the access point
- Searching for action plans from other users
- Executing an action plan
- Using the migration support agent
- Creating a new action plan.
- Advanced search, Profile Search
- Advanced search, Action Plan Preference
- Advanced search, Trust Search, Who to ask
- Advanced search, Trust Search, What AP to get back

For some of the test scenarios you need to have friends in the PROTAGE system. To get a direct result these users should be on-line. For this purpose the project has set up some users which are supposed to be on-line continuously. These users also have specific action plans and collections with specific file formats.

Information about these users and their other data is found in the document “Protage users for tests” at the Testing PROTAGE web site. Be sure to have the latest version as this document might be updated.

# 1. Scenario 1: Creating a new collection

Alice is a hobby photographer with a large collection of digital photographs. She is concerned with the long-term usability of her photos and decides to download and install the PROTAGE system – a tool to help her in maintaining her digital photos accessible for the long term preservation.

To start working with the PROTAGE solution she first creates a new collection, which means that she selects the location where she stores her photos and adds a few elements of description.

The detailed steps in this scenario are the following:

Step	Do this	Then this will happen
1	Log into PROTAGE with your user name and password	The PROTAGE client application window appears showing the Collection Profiles view
2	Click "New"	All the fields under "Basic Information" and "Detailed Information" turn blank
3	Select "Type" Input "Name" and "Description" Add "Source Folder(s)" This is the folder where your files are located (for example C:\My photos). Set "Destination Folder". This is the folder where processed files from this collection will be stored (for example C:\My preserved photos). Destination folder can not be a subfolder of the Source folder Click the button "Calculate statistics"	You will see the paths to your selected source and destination folders. "Collection Statistics" will show information about the source folders (numbers of files and folders, the total size of files and detailed information about how many files there are for every file type).
4	Click "Save"	You get the message that the collection profile has been saved and you can see the collection in the list on the left side of screen under Collections and Collection Information of the selected collection on the right of the screen.

## 2. Scenario 2: Selecting friends

Alice has learnt that to get more feedback you should have a network of friends in the PROTAGE-system. She finds some users she knows and trust already within the system. She adds these as her friends

The detailed steps in this scenario are the following:

Step	Do this	Then this will happen
1	Select Management and Friends Management from the PROTAGE application main menu.	The Friends Management view opens showing the list of all PROTAGE Users to the right. There is also a column which informs you which users are online at the moment.
2	You can get to know more about a user by clicking on it.	A User Information icon appears with some more information about the user.
3	Choose a user from the document “Protage users for tests”, select it in the right column and press the ‘<’-button.	The user is moved to the left column, your friends.
4	Save your changes by pressing the Save button.	You will get the information that your friends list has been updated.
5	Click OK	The Friends Management window will close
6	You can also remove friends by choosing a user in your friend list and click the ‘>’-button and then click ‘Save’.	That user will be removed from your list of friends.

### 3. Scenario 3: Searching for action plans from your local repository and from the access point

Next Alice tries to find some tools to improve the long-term usability of her photos and apply some preservation actions. To do so she executes a search for existing action plans using the keyword "images". Alice gets the result that her selected Access Point already has an Action Plan called „Image Migration“.

The detailed steps in this scenario are the following:

Step	Do this	Then this will happen
1	Select the Action Plans option from the PROTAGE application main menu	The Action Plans view opens showing the list of "My Action Plans", a frame for more detailed information on a selected action plan and a "Search for Action Plans" section
2	Choose a keyword, input it into the appropriate text box; also select "Agent-Based Intelligent Search" and click "Search"	The "Agent Search Log" will tell you that the search has started and that it will generate a deadline for the search. When an action plan is found it is added to the "Local Results" or "MAS Results" lists
3	The default Action Plans in your collection are the same as in the Access point. To be able to get a "Remote Result" from Access point, delete one of our local Action Plans, for example "Calc MD5". Select it under My Action Plans and use the Delete button. Repeat step 2 with relevant keyword, for example "calc".	The chosen action plan will be added in the "MAS Result" list.
4	It is possible to download results from the "Remote Result" list into your computer. To do so click on the name of the Action Plan and click the Save button	The Action Plan will be added to your local repository of Action Plans  The Action Plan that you saved can be seen in the list of My Action Plans on the left of screen. For a better overview you can sort the list by Name.

## 4. Scenario 4: Searching for action plans from other users

To search plans from other users we first change the searcher agent settings for plain Profile search.

Step	Do this	Then this will happen
1	Browse to Management, Agent Configuration, Searcher Agent, Agent Search Preference.	
2	At Search Type set <i>Profile</i> and <i>Advanced Configuration</i> . At User Profile Preferences set all fields to <i>Any</i> .	The searches by and answers from friends will only be based on keywords.
3	Click the tab Agent Search Advanced Configuration and set Maximum Degrees of Separation set to 3	The questions will be asked up to friend's friend's friends.

Next Alice tries to search for action plans also from her friends in the system. Alice knows that one of her friends is also a PROTAGE user, thus she adds him as her friend in the Protage system. After doing so she initiates a new search based on a suitable keyword. As a response she receives an Action Plan.

The detailed steps in this scenario are the following:


Step	Do this	Then this will happen
1	Look at the document "Protage users for tests" to find a suitable Action Plan among you friends to search for. Search keywords will get result from Action Plan name, keyword and description.	
2	Browse to Management -> Friends Management in the application menu	The Friends Management window opens and lists your friends and all other PROTAGE users
3	Check if the user with the plan you want really is online and add that user to your friend list, see Scenario 2..	The updated friend list will be saved and the Friends Management window will close
4	Browse to Action Plans in the application menu and write a keyword, select "Agent-Based Intelligent Search" and click "Search".	First the agent searches locally, if it's not happy with the result it searches the access point and if it still haven't found an acceptable plan it searches among the friends in the community. When it finds the result it's happy with it stops the search and returns it to the questioner.  The "Agent Search Log" will tell you that the search has started and that it will generate a deadline for the search. When an action plan is found it is added to the "MAS Result" list

5	<p>You can also find an Action Plan through a friend's friend. In the document "Protage users for tests" you can choose an action plan belonging to your friend's friend. Go to "Friends Management" and make sure that the user with the action plan is NOT your friend., and that both users are online.</p> <p>Repeat step 4 with a relevant keyword.</p>	<p>The "Agent Search Log" will tell you that the search has started and that it will generate a deadline for the search. When an action plan is found it is added to the "Remote Result" list</p>
6	<p>It is possible to download results from the "Remote Result" list into your computer. To do so click on the name of the Action Plan and click the Save button</p>	<p>The Action Plan will be added to your local Action Plans</p>

## 5. Scenario 5: Executing an action plan

Alice decides to execute one of the Action Plans she found from Cristel and downloaded into the list of her local Action Plans.

The detailed steps in this scenario are the following:

Step	Do this	Then this will happen
1	Browse to Action Plan Execution from the application menu	The Action Plan Execution view opens and let you choose an action plan to execute, and a collection on which to execute it
2	From the My Collections drop down list select an appropriate collection which includes for example .jpg files	Under “Execution Details” information about the collection will appear (name, ID, Type, source folders, size of source folders, number of files in source folder and output folder)
3	From the My Action Plans drop down list select an action plan which contains the action “PNG Image converter”	Under “Execution Details” information about the action plan will appear (name, ID, description)
4	Click “Execute”	The progress bar under “Execution Details” is moving from 0% to 100% when finished. The result is showing in the table below the progress bar.  If succeeded a mark  Completed appears in the column Status in the table below the progress bar
5	Select a row in the result list under the progress bar	The text box under the list shows information about the conversion; if it failed, then why and which files were not converted
6	Click the View Out button	.The folder with the result will be opened. You may study the result files.
7	Now you can rate the AP between 0 - 5 in the Rating dropdown list and then click Update Rating	If this is the first time this AP is rated it will get this rate. With many ratings the mean value of up to the five last ones will be the rating of the AP.

## 6. Scenario 6: Using the migration support agent

Alice is more or less satisfied with the results of the execution of the Action Plan. However, she wonders whether other users are concerned with preserving JPEG files. To get a picture about this, Alice deploys the Migration Support Agent and receives a response that questions on preservation of JPEG files are quite common in the system.

The detailed steps in this scenario are the following:

Step	Do this	Then this will happen
1	<p>Go to “Management” -&gt; “Agent Configuration” -&gt; “Migration Support Agent”</p> <ul style="list-style-type: none"> <li>• Set “Maximum Degrees of Separation” to 2</li> <li>• Set “Frequency of Appraisal” to 5 minutes</li> <li>• Click OK</li> <li>• Wait for at least 5 minutes</li> </ul>	<p>Every five minutes the list is updated with what file formats are used by your friends and friend’s friends.</p>
2	<p>Go back to “Management” -&gt; “Agent Configuration” -&gt; “Migration Support Agent”</p> <p>Click “Update table”</p> <p>Now you can select from what time you want to see the status. Choose the time under the dropdown “Select appraisal datetime”. Be aware that the sorting order is a bit peculiar.</p>	<p>You will be presented with the frequency of the users file types. It describes how many of the selected users who have each specific file types in their collection.</p>
3	<p>By adding/removing friends you will get another result. Check in the document “Protage users for tests” and choose to add or take away a friend under Friends Management.</p>	
4	<p>Do step 2 again.</p>	<p>You will see a different result</p>

## 7. Scenario 7: Creating a new action plan

Alice now thinks that the Action Plan converting JPG files into PNG files could do a little bit more. So she creates a new Action Plan and adds two actions: the original PNG converter action and an action to create technical metadata on the converted files. She saves the Action Plan and thus makes it available for all other PROTAGE users through the agent search.

The detailed steps in this scenario are the following:

Step	Do this	Then this will happen
1	Browse to the „Action Plans“ view Click ”Create new”	The fields under “General” turn blank
2	Insert ”Name”, ”Topic”, “Keywords”, ”Description” Click “Save”	You get the message that the action plan has been saved and the action plan is added to the list “My Action Plans”
3	Go to “Actions” in the action plans view and select the actions needed for the task in “Existing Actions” and click the arrow that goes to the right	The actions will be added to “Actions Used in The Action Plan”
4	Click ”Save”	You get the message that the action plan has been updated and the action plan is added as a new version in the list “My Action plans”
5	Check if you have succeeded to go through scenario 6	Name and version of the Action Plan that you saved can be seen in the list of My Action Plans on the left of screen.

## 8. Scenario 8: Advanced search, Profile Search

Now Alice wants to try a more advanced search option to get more specific answers. First she goes for Profile Search where she can choose preferences on the friends or friend's friends etc she wants to get answers from.

Step 1 – 6 is a general keyword search to show the difference in search results to the following profile search in step 7 – 11.

The detailed steps in this scenario are the following:

	Do this	Then this will happen
1	Browse to Management, Agent Configuration, Searcher Agent, Agent Search Preference.	
2	At Search Type check that it still is set to <i>Profile</i> and <i>Advanced Configuration</i> and that User Profile Preferences still all are set to <i>Any</i> .	The searches by and answers from friends will only be based on keywords.
3	Go to Agent Search Advanced Configuration and check that Maximum Degrees of Separation is set to 3	The questions will be asked up to friend's friend's friends.
4	Look at the document "Protage users for tests" and select a keyword which will give you answers from APs at different users.	
5	Check at "Friends Management" that the relevant users are all on-line.	
6	Make the relevant users your friends if they aren't already, see Scenario 2.	
7	Browse to Action Plans in the application menu, write the chosen keyword and click "Search".	Hopefully you will get answers from more than one user. As there are stop messages sent out from you when you have got an answer you might only end up with answers from the user that first answers the question.
8	Browse to Management, Agent Configuration, Searcher Agent, Agent Search Preference	
9	Under User Profile Preferences select a specific User Type and User Location which will give answers from only one user if you use the same keyword as above. Look at the document "Protage users for tests"  If you only did get answers from one	

	user in your last search now select specifications so you will get answer from the other one.	
10	Go to Agent Search Advanced Configuration and under User Profile Weights set 1 for User Type and User Location dependent how you specified them in step 9.	
11	Browse to Action Plans in the application menu, write the chosen keyword and click "Search".	Now you only will get answers from the user which satisfy your specifications.

## 9. Scenario 9: Advanced search, AP Preference

By choosing options for Actionplan Profile Preference Alice can limit what APs she will get as answers.

Step 1 – 5 is a general keyword search to show the difference in search results to the following profile search in step 6 – 9.

The detailed steps in this scenario are the following:

	Do this	Then this will happen
1	Looking at the document “Protage users for tests” and find a keyword which will give you answers with some different APs. These should be possible to limit by the topic or provider (that is the friend you will receive the AP from) in the actionplan profile.	
2	Browse to Management, Agent Configuration, Searcher Agent, Agent Search Advance Configuration	
3	Check that Maximum Degrees of Separation is still set to 3	
4	Make the relevant users your friends if they aren’t already, see Scenario 2.	
5	Browse to Action Plans in the application menu, write the chosen keyword and click “Search”.	You will get some different APs as search result
6	Browse to Management, Agent Configuration, Searcher Agent, Agent Search Preference	
7	Under Action Plan Profile Preferences select specifications under Topic and Provider which should give you a more limited answer than above.	
8	Go to Agent Search Advanced Configuration and under Actionplan Profile Weights set 1 for Topic and Provider dependent of if you used them for specifications just above.	
9	Browse to Action Plans in the application menu, write the chosen keyword and click “Search”.	Now you only will get APs which fulfils your specifications.

## 10. Scenario 10: Advanced search, Trust Search, Who to ask

Alice instead wants to change to trust search.

The detailed steps in this scenario are the following:

	Do this	Then this will happen
1	Look at the document “Protage users for tests” and find a keyword that can generate answers from two users. You might use the same one as in scenario 8.	
2	Check in “Friends Management” that the relevant users are all on-line.	
3	Make the relevant users your only friends, see Scenario 2.	
4	Now you should give one of the relevant friends lower trust value. Choose one AP from that user looking at the document “Protage users for tests”. This AP should be the same as what you will get by the keyword in step 1. Search and download it according to Scenario 4.	
5	Execute that AP according to Scenario 5 and give it a rating lower than 5.	The user will get that value as its trust value. The trust value of a user is the average value of the ratings of APs received from that user.
6	Browse to Management, Agent Configuration, Searcher Agent, Agent Search Preference.	
7	Set Search Type to <i>Trust</i> and select <i>Advanced Configuration</i> . Set “Max number of direct friends to ask in trust search” to <i>1</i> .	Only your most trusted friend will be asked. Default all your friends have the average rating 5.
8	Go to Agent Search Advanced Configuration and check that Maximum Degrees of Separation is set to more than <i>1</i> .	
9	Browse to Action Plans in the application menu, write the chosen keyword and click “Search”.	Now you should only get answers from the friend with the higher trust value.

# 11. Scenario 11: Advanced search, Trust Search, What AP to get back

Trust search will also have the effect that the APs you get back has a quality (rating) dependent on what trust the answering friend has in you. To experience this another user need a specific trust value in you. To achieve this Alice has to create a unique AP which can be downloaded and rated by other users.

The detailed steps in this scenario are the following:

	Do this	Then this will happen
1	First you have to be rated by another user to get lower trust value then the default 5.	
2	Create an Action Plan with a unique name see Scenario 7	
3	Write an email to support@protage.eu that you want to execute a trust search, include the name of your user and your AP. You will get information back about what user and what keyword to use.	The Protage Staff will have a user with many APs matching the same keyword but having different ratings. That user will give our user a lower trust level, a level which also will be sent to you.
4	Make the relevant user your friend if it isn't already, see Scenario 2.	
5	Browse to Management, Agent Configuration, Searcher Agent, Agent Search Preference.	
6	Set Search Type to <i>Trust</i> .	
7	If it is set to <i>Advanced Configuration</i> , Go to Agent Search Advanced Configuration and check that Maximum Degrees of Separation is set to more than 0.	
8	Browse to Action Plans in the application menu, write the keyword you received from PROTAGE and click "Search".	Now you should get some answers with APs having ratings from 10% lower than your trust value by the answering user.
9	Browse to Management, Agent Configuration, Searcher Agent, Agent Search Preference.	
10	Set Search Type to <i>Profile</i> and select <i>Advanced Configuration</i> . At User Profile Preferences set all fields to <i>Any</i> .	.

	This is done to illustrate that you will get more answers taking away the trust selection.	
11	Go to Agent Search Advanced Configuration and check that Maximum Degrees of Separation is set to more than 0	
12	Browse to Action Plans in the application menu, write the given keyword and click "Search".	Now you should get more answers with APs having ratings from lower value than 10% under your trust value by the answering user.

## 12. Technical support

Technical support during testing is provided through two e-mail addresses:

[support@protage.eu](mailto:support@protage.eu)

[protage@ra.ee](mailto:protage@ra.ee)