

Conférence Européenne des Directeurs des Routes

Conference of European Directors of Roads



# **Appraisal Toolkit User Manual**

Deliverable D2.2 Final Version 1.0 September 2023





Project acronym: INFRACOMS

## **Innovative & Future-proof Road Asset Condition Monitoring Systems**

# Report D2.2

Final Version 1.0

# **Appraisal Toolkit User Manual**

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# **Table of Contents**

Table	e of	Contents	4
List o	of Fi	igures	5
Abbr	evia	ations	6
1	Intro	oduction to the Project	7
2	Ove	erview of the INFRACOMS Appraisal Toolkit	8
3	INF	RACOMS Appraisal Toolkit 1	0
3.1	1	Knowledge Base 1	0
3.2	2	Technology Appraisals1	3
3.3	3	Case Studies 1	8
4	Star	ndard Wiki Functions	9
5	Sec	urity and Administration2	23
5.1	1	Adding users	23
5.2	2	INFRACOMS User Groups	23
5.3	3	NRA User Groups	<u>2</u> 4
5.4	4	NRA Separate Instance	<u>2</u> 4
6	Plat	form2	25
6.1	1	Confluence site	25
6.2	2	Site and space migration	25
6.3	3	Teams2	25
6.4	4	Spaces	25
6.5	5	Pages	25
6.6	6	Templates	25
6.7	7	Apps/Macros2	26
6.8	8	Acceptable use	26
6.9	9	Site moderation	26
7	Inde	ex2	27



# List of Figures

Figure 1. Vision and outcomes of INFRACOMS	7
Figure 2. Home page for the INFRACOMS Appraisal Toolkit	8
Figure 3. INFRACOMS Guidance	9
Figure 4. Side menu bar	10
Figure 5. Expand headings in the side menu bar	10
Figure 6. Explore the Knowledge Base	11
Figure 7. Access the home page	12
Figure 8. Search and browse functions	12
Figure 9. INFRACOMS Appraisal Methodology	13
Figure 10. Navigate to the INRACOMS technology appraisals	13
Figure 11. INFRACOMS Technology Appraisals	14
Figure 12. Filter the INFRACOMS list of appraisals	14
Figure 13. Create new INFRACOMS appraisal button	15
Figure 14. Create new INFRACOMS appraisal using the template	15
Figure 15. Set the status field and restrict editing to complete an appraisal	16
Figure 16. Pre-Evaluation portion of the INFRACOMS Appraisal	16
Figure 17. Evaluation portion of the INFRACOMS Appraisal	17
Figure 18. Uploading a PDF file as a case study	
Figure 19. Mark the appraisal to indicate that a case study is attached	
Figure 20. Edit page	19
Figure 21. Update page	19
Figure 22. Adding comments to a page	20
Figure 23. Watch or stop watching a page	20
Figure 24. Manage watchers on a page	20
Figure 25. Adding a label to a page	21
Figure 26. History of changes to a page	22
Figure 27. Setting restrictions on a page	22
Figure 28. Add users to Confluence	23
Figure 29. Handy macros	



# Abbreviations

Abbreviation	Definition
INFRACOMS	Innovative & Future-proof Road Asset Condition Monitoring Systems
TRL	Technology Readiness Level
WP	Work Package



# 1 Introduction to the Project

The application of consistent, reliable information has been a key component of highway asset management for over 40 years. The information and the tools to help collect, interpret and apply data have continuously evolved during that time. Technologies with the potential to support asset management include remote sensing, intelligent infrastructure monitoring, crowdsourcing, data analytics and visualisation. However, National Road Authorities (NRAs) are not yet fully exploiting their potential in the highway environment to better understand highway assets and to improve both reactive and proactive asset management decisions.



Figure 1. Vision and outcomes of INFRACOMS.

INFRACOMS aims to equip NRAs with the ability to better leverage the technological evolution in data and monitoring. Figure 1 summarises the approach being taken in this project. INFRACOMS is investigating the capabilities and benefits of technologies for understanding the performance of highway assets. INFRACOMS is establishing a database of new technologies and a toolkit to appraise them, to help NRAs assess the costs, benefits and limitations of applying these technologies in their own environments. INFRACOMS will also provide a roadmap to provide strategy and guidance for NRAs to improve their business processes for more effective assessment and implementation of new technologies.

This report represents the User Manual for the INFRACOMS Appraisal Toolkit as developed under Work Package 2.



# 2 Overview of the INFRACOMS Appraisal Toolkit

The INFRACOMS Appraisal Toolkit provides a database of technologies that are of potential use to National Road Authorities (NRA). It allows review and appraisal of those technologies using the methodology developed under INFRACOMS.

The toolkit has been created using the Confluence platform. Confluence is a wiki solution that is part of the Atlassian suite of products. A wiki is a website or online resource that can be edited by multiple users. Wikis are intended to be used by organisations or projects to manage information, and to enable teams to share knowledge and to work together in a collaborative manner.

The toolkit is accessible through a web browser. Figure 2 shows the home page or entry point for the toolkit. The web address of the toolkit is emailed automatically to any new user once that user is invited to access the platform (see Chapter 5).

← ♂ ⋒ 🖞 https://infracom-cerl.atlassian.net	/wiki/spaces/IKB/overview?homepageId=2293976		A* 🟠	<b>6</b> 3 0	c @ @ (b)
INFRACOMS Knowledge Base a	nd Appraisal Portal Home Recent v Spaces v Teams v Apps v Templates Crea	•	G	Search	P o o 😐 j
INFRACOMS Knowledge Base and Appraisal Portal	INFRACOMS Knowledge Base and Appraisal Por	tal	000	Share	Unstar this space
F Overview	6		(a)		
99 Blog +			CEDR Conference Européenne		
Space Settings		tion Honitaring Systems	des Directeurs des Routes Conterence of European Directers of Reads		
SHORTCUTS +					
CEDR INFRACOMS project website	Welcome to the INFRACE	MS Knowledge Base and	Appraisal Portal		
(b) CEDR	This site provides a database	f technologies that are of poten	itial use to National Road Authorities		
Pages ···· +	(NRAs), and allows review and	appraisal of those technologies	using the INFRACOMS methodology.		
INFRACOMS knowledge base	Other technology appraisals n	ay be stored on this site, includ	ing evaluations or appraisals by NRAs or		
<ul> <li>INFRACOMS technology appraisals</li> </ul>	by other organisations, using	heir own methodologies.			
INFRACOMS Guidance	Product literature from techno consulted in the preparation o	logy vendors is also stored on ti f INFRACOMS appraisals or NRA	his site. This literature may have been A appraisals.		
Product literature	Access to this site is governed	by the Acceptable Use Policy. T	he site is moderated by the INFRACOMS		
Research Papers	moderator according to the M	oderation Policy.			
	How to?	Need m	nore help?		
	View the technology database	Link to	resources such as your service desk,		
	<ul> <li>Conduct an INFRACOMS apprais</li> </ul>	al questio	ns and answers or a forum.		
	View Terms and Definitions	List con	tacts for getting additional help.		
		Search this site			
Archived pages		Search	Q Search		

Figure 2. Home page for the INFRACOMS Appraisal Toolkit

The graphical user interface is very user-friendly. Functionality is provided through point-and-click menus or links, and basic word-processing functions. There are many ways of finding help, including via on-line resources.

The toolkit also contains a guidance section. All INFRACOMS deliverables, including this user manual, have been uploaded to the Guidance section of the toolkit. See Figure 2. It gives general guidance on use of the toolkit, explanation of key concepts (such as Technology Readiness Levels, Data Architectures), and key features of the toolkit (such as recommendations on Page Labelling).

INFRACOMS also has an acceptable use policy so that users understand the purpose of the site and the rules governing the moderation and administration. A basic acceptable use policy and moderation policy have been established for INFRACOMS and are accessible from the home page. These should be reviewed and extended in future as more users and organisations are granted access. It is available from the overview page.





Figure 3. INFRACOMS Guidance

The remainder of this manual is structured as follows:

- Chapter 3 describes the three main functions of the toolkit: the Knowledge Base, Appraisals, and Case Studies.
- Chapter 4 describes standard wiki functions including editing, reviewing and commenting on content in the toolkit.
- Chapter 5 descibes Security and Administration inlcuding adding users.
- Chapter 6 provides information about the Confluence platform on which the toolkit is implemented. This chapter is primarily for use by Site and System Administrators.
- Chapter 7 contains an index for terms and functions in the toolkit.



# 3 INFRACOMS Appraisal Toolkit

The INFRACOMS Appraisal Toolkit consists of three main components: the Knowledge Base, Appraisals, and Case Studies.

Note that some functions may not be visible or may be disabled for some users depending on the security permissions assigned. For any questions ask the Site Administratoror see Chapter 5 Security and Administration.

# 3.1 Knowledge Base

The INFRACOMS Knowledge Base is a collection of pages containing information on the technologies that have been appraised for NRAs under INFRACOMS.

# 3.1.1 Explore the Knowledge Base

There are multiple ways to explore the Knowledge Base.

#### Side menu bar

The side menu bar (see Figure 4) should always be visible from any point in the toolkit. Click on any of the content in the menu bar to bring you to the appropriate page. The paeg may expand the page to show sub-headings under that particular category. Click the heading or sub-heading to expand or contract the material (see Figure 5) and view relevant material there.

INFRACOMS Knowledge Base and Appraisal Portal		INFRACOMS Knowledge Base and Appraisal F	Portal
		= Overview	
Overview		99 Blog	+
99 Blog H	-	Space Settings	
Space Settings		SHORTCUTS	+
SHORTCUTS -	+		
♂ CEDR INFRACOMS project website		(e) CEDR	
🙌 CEDR		Pages  INFRACOMS knowledge base	++
Pages ···· -	-	Terms and Definitions	
INFRACOMS knowledge base		<ul> <li>Data processing and visualisation</li> </ul>	
<ul> <li>INFRACOMS technology appraisals</li> </ul>		Digital twins	
> INFRACOMS Guidance		Expert systems	
> Product literature		Machine vision     Machine learning	
Research Papers		<ul> <li>Internet of things</li> </ul>	
5		> Crowdsourcing	
Figure 4. Side menu bar		Remote Sensing	
		<ul> <li>INFRACOMS technology appraisals</li> </ul>	

Figure 5. Expand headings in the side menu bar

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Click on the INFRACOMS Knowledge Base, for example, and navigate to Data Processing and visualisation, to bring up content relating to Digital Twins, Machine Learning, Machine Vision etc. that has been created under the INFRACOMS project (see Figure 6). All information in the Knowledge Base relates to technologies identified under INFRACOMS WP1 new and emerging technologies. This information can be edited, commented upon, and added to in future using standard wiki functions (see Chapter 4).

<b>Uni</b>	INFRACOMS Knowledge Base and Appraisal P	ortal	Data processing ar	nd visualisation	
=	Overview		Owned by Kevin McPherson ••• Last updated: Jun 19, 2023 • 2 mi	n read 🔹 5 people viewed	
"	Blog	+	Advanced Data Processing refers	to any novel or emergent technology w	hich extracts or enhances the value
0	Space Settings		of data. This category is dominat	ed by applications of machine learning,	where learning algorithms automate
			analysis processes. However, the enhance manual analysis by hum	category also includes visualisation met nan operatives.	hods such as digital twins which
SHO	RTCUTS	+			
0	CEDR INFRACOMS project website		Technology	Description	Application to Highways
(2)·	CEDR		Machine Learning (ML)	Machine learning is a broad term for mathematical learning	Machine learning may be applied anywhere where mathematical
E	Pages •••	+		algorithms, which may be trained to perform various functions and	includes: classification of assets,
	<ul> <li>INFRACOMS knowledge base</li> </ul>			may be capable of optimising	defect detection, driving
	Terms and Definitions			their own function.	assistance, and traffic management.
	<ul> <li>Data processing and visualisation</li> </ul>		Machine Vision	This is a specialised form of	The application of machine vision
	Digital twins			machine learning which allows the detection and classification of	in highways asset management are broad. It can be used to
	Expert systems			objects or features within images	detect and classify assets to
	Machine vision			or video.	inventories. It may also be used
	Machine learning				to detect and classify defects
	> Internet of things		Evnert Systems	Expert systems automatically	Expert systems may be used to

Figure 6. Explore the Knowledge Base

#### Search and browse by page label functions

From any point in the toolkit, click the Overview in the Side Menu Bar (see Figure 7) to access the home page. Then, from the home page, scroll down to the bottom half of the page to locate the search and browse by page label functions (see Figure 8).

# CEDR CALL 2021



C R https://infracom-cerLatlassian.net/wiki/spaces/IKB/overview?hom	epageld=2293976		A" 12 6 G	
Confluence INFRACOMS Knowledge Base and Appraisal Portal Home	Recent - Spaces - Teams - Apps - Templates Create		Q. Search	🤗 o o 🥺
INFRACOMS Knowledge Base and Appraisal Portal	Knowledge Base and Appraisal Portal		🖉 💿 🧕 🧏 Share	••• Unstar this space
C Overview	9	$(\cdot)$		
9 Blog + \$ Space Settings			ence Européenne récleurs dos Routes noise of Curragean crs al Roads	
ORTCUTS +				
CEDR INFRACOMS project website CEDR Pages +++ INFRACOMS knowledge base INFRACOMS knowledge base INFRACOMS knowledge base Internet of things Inter	Welcome to the INFRACOMS Kno This site provides a database of technolo (NRAs), and allows review and appraisal Other technology appraisals may be ston by other organisations, using their own n Product literature from technology vend consulted in the preparation of INFRACO Access to this site is governed by the Acc	vledge Base and Appraisal Portal jes that are of potential use to National Road Au f those technologies using the INFRACOMS meth d on this site. Including evaluations or appraisals ethodologies. rs is also stored on this site. This literature may ha dS appraisals or NRA appraisals.	horities odology. zy NRAs or ve been FRACOMS	
Crowdsourcing     Remote Sensing	moderator according to the Moderation	holicy.		
<ul> <li>INFRACOMS technology appraisals</li> </ul>	How to?	Need more help?		
Tyre Grip Indicator (TGI) by NIRA as potent     Acoustic Emissions to detect wire break in	View the technology database     Conduct an INFRACOMS appraisal     View Terms and Definitions	<ul> <li>Link to resources such as your servic questions and answers or a forum.</li> <li>List contacts for getting additional h</li> </ul>	e desk,	
EyeVi Technologies Platform for detection				
COWI Virtual Inspection Platform     INEPACOMS Guidance	Se	arch this site		
<ul> <li>Introductions obligance</li> </ul>				

Figure 7. Access the home page

	bearent		
	Search	Q Search	
	Browse by	page label	
A-M	N-S	T-Z	
acoustic-sensor carriageway crowdsource crowdsourcing data-architecture drone guidance infracoms-readiness-le lidar	nira panoramic-camera remote_sensing road-friction scrim structure	technology-readiness-level telemetry texture thermographic-camera tyre-grip-indicator video-camera wire-break	
<ul> <li>NEED INSPIRATION?</li> <li>Check out this gui</li> <li>Follow Twitter's 5</li> </ul>	de on how to use Confluenc tips for a successful knowled	te as a Knowledge base Ige base	

Search this site: Type any text into the search box, and click Search, to bring up any page in the site containing the search text

Browse by page label: Click on any of the page labels listed to bring up any page in this site containing that label. The page labels in this list are automatically populated by the toolkit based on page labels assigned to the page.

Figure 8. Search and browse functions

# 3.1.2 Add to the Knowledge Base

The Knowledge Base is implemented as a series of Pages in the toolkit. Any user with appropriate permissions can add to, review or comment on the Knowledge Base in the same way as they can interact with any Page in Confluence. See Chapter 4 for more information on general wiki functions.



## 3.2 Technology Appraisals

A technology appraisal is a detailed review of a particular application of a technology by an NRA.

As described in Deliverable D2.1 Appraisal Methodology, an INFRACOMS appraisal has three (3) core processes, with increasing levels of detail and complexity. See Figure 9. These three processes are:

- Pre-Evaluation
- Evaluation
- Case Study

The toolkit allows the storage of information relating to each stage of the appraisal methodology.



Figure 9. INFRACOMS Appraisal Methodology

# 3.2.1 Explore the list of technology appraisals in the toolkit

From any point in the toolkit, click INFRACOMS technology appraisals on the Side Menu Bar (Figure 10) to navigate to the list of appraisals and to bring up the Technology Appraisals screen (Figure 11).



Figure 10. Navigate to the INRACOMS technology appraisals



DMS Knowledg						+ Add status	10	🖸 🖸 🎎	<b>în Sh</b>
INF	RACOM	S technol	ogy appr	aisals					
(K)) Cre	Owned Last up eate New Appr	l by Kevin McPhersor Idated: Sept 21, 2023 r <b>aisal</b>	i by James Weeks • 1	min read 🔸 🗠 9 pec	pple viewed				
Sea	rch		Q Sear	ch					
The t	ble below con Date of Appraisal	itains appraisals Asset type	Pre- Evaluation	eing conducted u INFRACOMS Readiness	Inder INFRACOMS	Solution Group	Status	Strategic Imperative	Strateg 💎
_			TRL	Level				1	2
Acoustic Emissions to detect wire break in steel cables in bridges	Jun 6. 2023	STRUCTURE	PRE-EVAL TRL 7	IRL 8	INFRACOMS	REMOTE SENSING	IN REVIEW	AVAILABILITY	N/A
Acoustic Emissions to detect wire break in steel cables in bridges     COWI Virtual Inspection Platform	Jun 6. 2023 Sep 1, 2023	STRUCTURE	PRE-EVAL TRL 7 PRE-EVAL TRL 9	IRL 8 IRL 9	INFRACOMS INFRACOMS	REMOTE SENSING	IN REVIEW	AVAILABILITY	N/A N/A
Acoustic Emissions to detect wire break in steel cables in bridges     COWI Virtual Inspection Platform     EyeVi Technologies Platform for detection of road defects, signs, markings etc.	Jun 6, 2023 Sep 1, 2023 Sep 1, 2023	STRUCTURE STRUCTURE CARRIAGEWAY	PRE-EVAL TRL 7 PRE-EVAL TRL 9 PRE-EVAL TRL 8	IRL 8 IRL 9 IRL 8	INFRACOMS INFRACOMS INFRACOMS	REMOTE SENSING REMOTE SENSING REMOTE SENSING	IN REVIEW	AVAILABILITY AVAILABILITY SAFETY	N/A N/A N/A

Figure 11. INFRACOMS Technology Appraisals

The page contains a list of all appraisals in the database. This list is populated automatically in the toolkit and is updated whenever a new appraisal is added. See section 3.2.2 for how to add a new appraisal.

The user can search for a particular use case by typing text into the Search box.

A filtering mechanism is also built into the tool so that the user can filter the list of use cases. Click the small filter button at the top right hand corned of the list of use cases in Figure 11, or click any of the headings in the table to filter by a particular column (for example, see Figure 12 which restricts the list to technology use cases applicable to the carriageway asset type). Multiple filters can be set and applied.

Title	Date of Appraisal	Accat tuna	Pre- × × TRL	INFRACOMS Readiness Level	Organisation	Solution Group	Status	Strategic Imperative 1	Strateg Impera 2
EyeVi Technologies Platform for detection of road defects, signs, markings etc.	Sep 1, 2023	CARRIAGEWAY	PRE-EVAL TRL 8	IRL 8	INFRACOMS	REMOTE SENSING	IN REVIEW	SAFETY	N/A
Tyre Grip Indicator (TGI) by NIRA as potential replacement for network-wide Sideways Force skid resistance measurement	Jun 6, 2023	CARRIAGEWAY	PRE-EVAL TRL 7	IRL 3	INFRACOMS	CROWDSOURCING	DRAFT	SAFETY	N/A

Figure 12. Filter the INFRACOMS list of appraisals



# 3.2.2 Add a new appraisal

To add a new appraisal, click on the grey 'Create New Appraisal' button near the top of the appraisals screen. See Figure 11.

INFRACOMS Knowledg	+ Add status	⁄ଢ ☆ 0	🥵   🔒	Share ••••
INFRACOMS technology appraisals				
Conned by Kevin McPherson *** Last updated: Sept 21, 2023 by James Weeks • 1 min read • 🗠 9 people viewed				
Create New Appraisal				

Figure 13. Create new INFRACOMS appraisal button

This creates a new blank page in the toolkit based on the INFRACOMS appraisal template. See Figure 14. All boxes in the template are designed to store information on the Pre-Evaluation, Evaluation or Case Study.

@ © B III + ~		КМ +	Q	Ъ	Publish	Close draft	
. / INFRACOMS technology appraisals							
itle							
_table							
EDIT							
@ mention the owner							
🛅 Jan 1, 2000							
EDIT							
N/A							
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Table of Contents							
A table of contents based on the headings of this page will appear here once it has been published.							
NO							
	<ul> <li>INFRACOMS technology appraisals</li> <li>INFRACOMS technology appraisals</li> <li>tle</li> <li>table</li> <li>table</li> <li>mention the owner</li> <li>Jan 1, 2000</li> <li>min</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> </ul>	<ul> <li>INFRACOMS technology appraisals</li> <li>INFRACOMS technology appraisals</li> <li>the</li> <li>table</li> <li>table</li> <li>emminon the owner</li> <li>Jan 1, 2000</li> <li>Emminon</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> </ul>	<ul> <li>INFRACOMS technology appraisals</li> <li>(*)</li> <li>tle</li> <li>table</li> <li>mention the owner</li> <li>Jan 1, 2000</li> <li>min</li> <li>Ma</li> <li>Ma</li> <li>Ma</li> <li>Ma</li> <li>Na</li> <l< td=""><td><ul> <li>○ B ■ + + </li> <li>(NFRACOMS technology appraisals + +</li> <li>tle</li> <li>table</li> <li>an 1, 2000</li> <li>Bur</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> </ul></td><td><ul> <li>INFRACOMS technology appraisals</li> <li>(INFRACOMS technology appraisals</li> <li>tle</li> <li>table</li> <li>man</li> <li>@ mention the owner</li> <li>] Jan 1, 2000</li> <li>man</li> <li>Ma</li> <li></li></ul></td><td>Image: Set in the set of contents       Image: Set of the s</td><td>Image: Source of the state of the</td></l<></ul>	<ul> <li>○ B ■ + + </li> <li>(NFRACOMS technology appraisals + +</li> <li>tle</li> <li>table</li> <li>an 1, 2000</li> <li>Bur</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> <li>NA</li> </ul>	<ul> <li>INFRACOMS technology appraisals</li> <li>(INFRACOMS technology appraisals</li> <li>tle</li> <li>table</li> <li>man</li> <li>@ mention the owner</li> <li>] Jan 1, 2000</li> <li>man</li> <li>Ma</li> <li></li></ul>	Image: Set in the set of contents       Image: Set of the s	Image: Source of the state of the

Figure 14. Create new INFRACOMS appraisal using the template

It is important to give the new appraisal a title. This title should be descriptive of the use case of the technology. You can 'publish' or save this page at any time, and it will appear in the list of appraisals as shown in Figure 11.

The first set of information in the table (marked 'Table Excerpt' in Figure 14 is general information concerning the status, the owner, the organisation, the date of appraisal, and the strategic imperative(s) of the NRA for which this technology is under consideration. Any information which appears in a 'table excerpt' is included automatically in the the search and filter criteria in Figure 11.



By default, the Status field is blank. The Status field should be set to either Draft, In Review or Completed depending upon its status. If the appraisal status has been reviewed, the reviewer (who should be a member of the user group 'INFRACOMS managers') should set the value of this field to 'Completed' <u>and</u> set the Page Restrictions so that only INFRACOMS managers can view and edit. See Figure 20.

Status Change Status History	
Status set: Evaluation Status	
EDIT DRAFT IN REVIEW COMPLETED	INFRACOMS Knowledg / INFRACOMS technology appraisals UNPUBLISHED CHAINGES + Add status 🖉 😋 🏠 💽 🞉   🔓 Share … Editing restricted

Figure 15. Set the status field and restrict editing to complete an appraisal

Pre-Evaluation provides a high-level description of the technology, analysis of the anticipated cost factors, benefits and limitations of the technology use case. The Pre-Evaluation section of the template allows the appraiser to fill in all the information included in the Pre-Evaluation. See

#### **Pre-Evaluation** Parameter Assessment Asset type REMOTE SENSING Solution group References https://www.cowi.com/focus/virtual-inspection Performance indicators Surface condition (delamination, cracks) Anticipated cost factors Drone scan of structure Software cost and cloud access · Expert evaluation may also be required **Anticipated benefits** · Inspections using drones on large bridges can significantly reduce the need for lifts, boats, climbing, and rappelling equipment. · Drones with thermography camera provide greater possibility to collect data from the entire structure than hammer tapping, which often only collect data from selected random samples. • Direct coupling between photos and geographical position facilitate tracking the development of defects at later stages. · Capability to track defect progression over time is enabled by comparing current issues with images captured from prior years. Anticipated limitations · Some areas may be inaccessible with drones · Platform does not encompass data from beneath the water surface PRE-EVAL TRL 9 Pre-Evaluation TRL

Figure 15. See also D2.1 INFRACOMS Appraisal Methodology for purpose and details of each field.

Figure 16. Pre-Evaluation portion of the INFRACOMS Appraisal



The Evaluation represents a more detailed breakdown of the, benefits, limitations and cost factors of the technology within the proposed use case, including a more in-depth technical evaluation and an assessment of the steps needed that would be required to implement it in an NRA. It provides an assessment of the readiness level of the technlogy from the NRA's perspective. The Evaluation section of the template allows the appraiser to fill in all the information included in the Evaluation. See Figure 17. See also D2.1 INFRACOMS Appraisal Methodology for purpose and details of each field.

Evaluation	
Technology and Data	
Parameter	Assessment
Existing process	Visual inspection Hammer tapping
Potential new data collection method	Drone flights
Opportunities for enhancement of existing processes	
Spatial coverage of the technology	Local
Cost factors	<ul><li>Drone pilots</li><li>Generation of 3D models</li><li>Some defects may require additional consultancy from expert</li></ul>
Benefits	<ul> <li>Easier collaboration on review of the results</li> <li>More objective results because of the collaboration</li> <li>History of the bridge is recorded</li> <li>Savings due to reduced expenses for access restrictions, lifts, and boats</li> <li>Improved worker safety</li> </ul>
Limitations including needs for additional data	Platform does not incorporate data from beneath the water surface
Alternative technologies which may overlap or complement the data to be provided	Hammer peering Visual inspection
Roadmap to implementation	
Summary evaluation	The data reveals the structural condition, enable planning for and handling issues while they are

Figure 17. Evaluation portion of the INFRACOMS Appraisal



## 3.3 Case Studies

A Case Study is an in-depth analysis of a completed implementation of the technology for a given NRA. Due to the detailed nature of each technology and use case, and the fact that case studies for different technologies may be very different in content, the INFRACOMS Appraisal Toolkit allows storage of the Case Study information as a PDF (Portable Document Fomat) file. Typing a '/' in the table brings up a menu in the toolkit which allows the user to add an image, video or file to the site. Figure 18 shows how to upload a PDF file as a case study. Multiple PDFs can be added to represent different case studies.

		•	Action item Create and assign action items	0
			Image, video, or file Add images and other files to your page	
		9=	Mention 6 Mention someone to send them a notification	9
		÷	Emoji Use emojis to express ideas 🏂 and emotions 🤢	:
<b>(</b> )	Case Studies		Expand Insert an expand	
No.	Case Study Description		Table Shift+Alt+	T
1	Use of this technology for the Faroe Bridges in Denmark. One is a girder bridge, the other is a cable-stayed bridge.	1		

Figure 18. Uploading a PDF file as a case study

After uploading a case study, the user should also update the 'case studies attached' field in the appraisal header to 'Yes'. See Figure 19.

Table Excerpt   name = eva	al_table			
Status	IN REVIEW			
Organisation	INFRACOMS			
Owner	@mssi			
Date of Appraisal	🛅 Sep 1, 2023			
Strategic Imperative 1	AVAILABILITY			
Strategic Imperative 2	N/A			
Strategic Imperative 3	N/A			
On this page	Table of Contents			
	A table of contents based on the headings of this page will appear here once it has been published.			
Case Studies Attached	YES			

Figure 19. Mark the appraisal to indicate that a case study is attached



# 4 Standard Wiki Functions

Most of the pages in the INFRACOMS Appraisal Toolkit have multiple standard functions, whether part of the Knowledge Base, or Technology Appraisals, or Guidance, or Literature. This chapter describes some of those standard functions. Further information is available in Confluence online documentation.

#### Edit

In normal mode, pages can be viewed or commented upon. To edit the contents of any page, click the edit button at the top of the page to go to edit mode. This allows you to edit the page using standard edit functions. See Figure 20.



Figure 20. Edit page

#### Update changes

If in edit mode, you may make changes to the page. When complete, you may update the page changes (see Figure 21), or close the page without saving the updates (click the Close button immediately to the right of the Update button.



Figure 21. Update page



#### Comment

There are two ways to add comments to a page:

- 1. Comments section: Scroll to the end of a page to find the comments section.
- 2. Inline comments: Highlight a portion of text on a page and the comment button appears. Use the comment button at the top of a page to display any inline comments.



Figure 22. Adding comments to a page

#### Watch

Users can elect to receive notifications via email when pages they are "Watching" are updated. Emails are sent instantly (or every 10 minutes) as changes are made and so notifications can quickly become intrusive. To stop receiving notifications the user can stop "Watching" a page. This may be done in multiple ways:

1. Using the eye icon on a page:



Figure 23. Watch or stop watching a page

- 2. Going to their user settings: User icon (furthest top-right) > Settings > Watches
- 3. Using the link at the bottom of an email notification:

Stop watching this space Manage notifications

4. Admins have the option to manage who watches a page or space via the eye icon on a page:



Figure 24. Manage watchers on a page

Users will automatically become watchers of a page when they edit or comment on it. This behaviour may be changed by the user via their email settings:

User icon (furthest top-right) > Settings > Email > Autowatch.



#### Page labels

One of the key features of the toolkit is the ability to label pages. By assigning labels to pages, users can categorise and organise content, making it easier to find later.

Adding labels to your pages is easy and there are many ways to do it. The most straight-forward way is simply clicking the label icon at the bottom of any page in to bring up the label box, and type in the label you want. All labels are convered to lower case, and if multiple words are used, then these are automatically hyphenated. See Figure 25.

1 Use of this technology for the Faroe Bridges in Denmark. One	
is a girder bridge, the other is a cable-stayed bridge.	

Figure 25. Adding a label to a page

Labels come with the risk of label overload. That's why it's important to follow some best practices when using labels. The top three recommendations when using labels are:

Use Labels to Categorize Pages: First and foremost, the aim of using labels is to bring additional categories to your content, so that you can easily find all pages in a specific category. For example, you could use the label 'structures', so that you can later list all technologies related to structures, no matter where in the knowledge base it is located.

Be Consistent: It's important to keep your labels organized and be consistent. You can do this by using a naming convention for your labels. For example, a frequent source of label confusion is the question whether to use dashes or underscores in compound words, i.e. whether your team prefers meeting\_notes or meeting-notes. In INFRACOMS, we have used dashes. Note that Confluence ignores capitalization and displays all labels in lowercase. That means How-To and how-to are the same label as far as Confluence is concerned.

Be Clear, Concise and Specific. Great labels are clear, concise and can be quickly understood without much context. Try to keep your labels short (1-2 words) so they're easy to scan. It's also important that your labels are specific. Don't be vague: and label a page 'general' or 'stuff' if those labels do not carry any clear meaning; those labels aren't going to be very helpful. Finally, be sure to remove any labels that do not describe or categorize a page.



#### Page history

Confluence keeps a history of changes to all pages. Click the ellipsis (...) at the top right hand corner of the page (see Figure 26) and click on Page history to view previous versions of the page and to identify what changes were made, by whom, and when. Previous versions of pages can be restored as necessary, or compared with other selected versions. Other functions such as Change page owner are also available.

INFRACOMS Knowled	dg / INFRACOMS technology	appraisals	+ Add status		🗿 🧏   🔓 Shar	e ••••
	Owned by Kevin McPherson, created with a template         • Last updated: Sept 21, 2023 • 6 min read				Copy Move Export	More actions
	Status	IN REVIEW			Convert to blog Archive	
	Organisation Owner	INFRACOMS @ mssi			Presenter mode	r
	Date of Appraisal Strategic Imperative 1	Sep 1, 2023 AVAILABILITY			Analytics Change page owner Page history	
	Strategic Imperative 2 Strategic Imperative 3	N/A N/A			Attachments Resolved comments	<b>&gt;</b>
×	on this page	Pre-Evaluation     Evaluation     Case Studies			Advanced details Slack Notifications	>

Figure 26. History of changes to a page

#### Page restrictions

Restrictions may be set on individual to restrict users or groups from editing them. Configure this on each page through the padlock icon. See Figure 27.



Figure 27. Setting restrictions on a page

Child pages inherit restrictions from their parent page.

Site or Space admins can view and remove restrictions via *Space Settings > Manage pages > Restricted*.



# 5 Security and Administration

The toolkit has been configured for use by staff on the INFRACOMS project to conduct technology appraisals, upload case studies, and generally add information to the knowledge base. This chapter provides basic information on how user groups have been established in Confluence for purposes of INFRACOMS, how new users can be added, and how users and user groups could be set up to enable NRA usage of the toolkit. This chapter is intended for use by a system administrator. Further detailed information can be obtained from the Atlassian site and other online resources.

## 5.1 Adding users

To add a new user to Confluence, the Systems Administrator should click on Teams at the top of any site page, and click 'Invite people to Confluence'. See Figure 28. Add an email address for the person you wish to invite. More than one email address can be added. Confluence will send an email to any email address inviting them to the site.

Teams - Apps - Templates Create	Add people to Confluence
YOUR TEAMS	☑ username@nra.org × add more people
2 members	G Google 👫 Slack 📑 Microsoft
+ Invite people to Confluence	Access Allow
Create a team	<ul> <li>Site users to invite other people.</li> <li>✓ Verified &lt;@nra.org&gt; email users to join.</li> </ul>
Search people and teams	This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.
	Cancel Add 1 person

Figure 28. Add users to Confluence

Note that granting any user access to the INFRACOMS toolkit has financial implications for the hosting organisation. The system administrator should check with INFRACOMS project management before adding users.

## 5.2 INFRACOMS User Groups

User groups are a method for assigning permissions to multiple users.

The following groups have been created for the INFRACOMS project:

- "site-admins": This represents the highest level of access. Members of this group can access all admin features including creating users, assigning permissions, removing users, and billing.
- "confluence-users-infracom-cerl" group: regular "User" role access to the Confluence product and the toolkit. Members of this group can view and edit all pages in the INFRACOMS Knowledge Base and Appraisal Portal. However, they cannot configure page restrictions (for approving an appraisal).
- "INFRACOMS Managers" group: Members of this group can do everything that a regular user can do, plus can configure page restrictions in order to approve an appraisal.



# 5.3 NRA User Groups

If an NRA wishes to obtain access to the INFRACOMS toolkit while the project is ongoing, then a separate User Group should be created to represent that NRA, and individual NRA staff members can be created as members of that User Group.

If required, members of this group can create appraisals in their own Space. If they wish to share these appraisals to other INFRACOMS users, then a member of the INFRACOMS user group can copy the completed appraisal pages to the INFRACOMS space.

# 5.4 NRA Separate Instance

If an NRA wishes to obtain create a separate site for internal use by the NRA only, then the NRA becomes responsible for all administration and billing for that site. The NRA could replicate the groups set up for INFRACOMS, or could create an entirely different security model.



# 6 Platform

The INFRACOMS toolkit has been created using the Confluence platform. Confluence is a wiki solution that is part of the Atlassian suite of products. Atlassian provides extensive guidance on administration and setup of Confluence, including web pages, YouTube tutorials etc. This chapter provides basic information on how Confluence has been set up for purposes of INFRACOMS, and is intended for use by a system administrator. Further detailed information can be obtained from the Atlassian site and other online resources.

# 6.1 Confluence site

The name of the Confluence site created for INFRACOMS is "<u>infracom-cerl</u>". Site admins can manage configuration of user roles, apps/macros and billing/licensing at an overall site level. A site can consist of multiple users, Teams, and Spaces.

# 6.2 Site and space migration

If required, for example to export the INFRACOMS site for sole administration and use by an NRA, the Confluence site administrator can export the entire INFRACOMS site to another instance of Confluence. See the <u>Atlassian guide</u> for migration of a site. For migrating a space see <u>this Atlassian</u> <u>guide</u> on exporting and importing spaces.

Page templates are not included in the above types of transfer. Templates may need to be remade in the target instance of Confluence. To remake a template, <u>this workaround</u> may be useful.

## 6.3 Teams

In Confluence, Teams can be set up so that users of that team can be @mentioned or have content shared with them by referencing the Team instead of multiple users separately. Note that permissions are **not** applied to Teams, use Groups to configure permissions.

## 6.4 Spaces

In Confluence, Spaces are containers for content such as Pages, Blogs or Files. The *INFRACOMS Knowledge Base and Appraisal Portal* is implemented in a single Space.

Users can also have their own Personal Space. By default, these are created automatically when new users are added.

## 6.5 Pages

Each technology appraisal exists as a Page. Pages can be nested to create hierarchies of content. Nested pages become *Child pages* to the *Parent page* and inherit properties from the parent.

Child Pages may be created by dragging and dropping the page in the sidebar menu or clicking the "+" icon next to the target parent Page. Technology appraisals created from the button on the technology appraisals summary page have been configured to become child pages of that page automatically.

## 6.6 Templates

Pages can be created from **templates** to encourage consistency. A global template for technology appraisals has been created and is triggered from a button on the INFRACOMS technology appraisals landing page.

Only **site admins** can create or edit global templates.



# 6.7 Apps/Macros

Apps and macros extend and improve functionality and create dynamic content. For example, the summary table on the technical appraisals landing page is achieved through macros on both the landing page and each tech appraisal page that lookup and transform the relevant content.

Third party macros can involve licensing with an associated additional cost per user/month. The "Handy" macros are an example of this in use on the tech appraisals pages.

The *Handy Status* macro has been used in the toolkit to enable creation of single-value statuses that the user may select from preconfigured sets of values e.g. the "Solution group" status on each tech appraisal page. Users may update a status without putting a page in edit mode. Status sets may be configured by **site admins** via *Apps > Handy Macros*. See Figure 29.

		Status Change Status History
Parameter	Assessment	Status set: Solution Groups
Asset type	CARRIAGEWAY	
Solution group	CROWDSOURCING	REMOTE SENSING

Figure 29. Handy macros

The Table Transformer macro is used to transform summary information from each tech appraisal page and display the summary table on the tech appraisal summary page. Custom transformations and formatting are possible using SQL. See this <u>Advanced table cells formatting guide</u> for formatting examples.

# 6.8 Acceptable use

All collaborative spaces should have an acceptable use policy so that users understand the purpose of the site and the rules governing the moderation and administration of the site. A basic acceptable use policy has been established for INFRACOMS. This should be reviewed and extended in future as more users and organisations are granted access.

# 6.9 Site moderation

All collaborative spaces require moderation to ensure that the acceptable use policy is being adhered to. A basic moderation policy has been established for INFRACOMS. This should be reviewed and extended in future as more users and organisations are granted access.



# 7 Index

Acceptable use policy, 8, 26 Appraisal, 13 Add new appraisal, 15 Case Study, 15 Evaluation, 15 Filter list of appraisals, 14 Pre-Evaluation, 15 Publish, 15 Template, 15 Comments Adding comments to a page, 20 Reviewing comments on a page, 20 Confluence, 8, 25 Costs, 23, 26 Edit mode, 19 Email, 8, 20, 23 Handy macros, 26 History, 22 Knowledge base, 10 Macros, 26

Moderation policy, 26 National Road Authority Access to the toolkit, 24 Page, 25 history, 22 Restrictions, 22 version, 22 Page labels, 8, 12, 21 Side menu bar, 10 Site, 25 Space, 25 Table transformer macro, 26 Team, 25 User groups, 23 Users, 23 Watch Change notification settings, 20 Manage watchers, 20 Watch a page, 20