

Security and Software Assessment Services (SSAS)

Instructions Guide for Reviewing Electronic Media (E-Media)

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Introduction

To improve the quality of EPRI products distributed to EPRI customers, the Security and Software Assessment Services (SSAS) has developed this *Instructions Guide for Reviewing Electronic Media (E-Media)* to provide useful hints and steps for checking all E-Media products *before* they are distributed.

What is E-Media?

E-Media stands for “Electronic Media” – which includes information in files distributed on CD, DVD, and downloaded from www.epri.com.

One example of E-Media is a proceedings CD created from a sector advisory council meeting.

Typical proceedings might include:

- Agendas
- Attendees
- Highlights
- Meeting Invitations
- Next Meeting Announcements
- Presentations/Reports/Papers
- Readme files

Typical E-Media come in the following formats (with example extensions):

- Adobe Acrobat (.pdf)
- Audio (.wav, .mp3)
- Graphic (.gif, .bmp, .jpeg)
- Microsoft Excel (.xls)
- Microsoft Word (.doc)
- Movie (.avi, .mpeg)
- Microsoft Power Point (.ppt)
- Text (.txt)
- Web (.htm, .html)
- Zip (.zip)

Typical E-Media may contain:

- Links within the proceedings
- Links directing the user from the proceedings to the internet
- Navigation controls (e.g., buttons) within the proceedings

Objective of this Guide

When given a distribution media (CD or DVD) for distribution, you need to perform a quality review and are responsible for checking all the information on the E-Media. This guide provides instructions on what to review for.

However, if you are not comfortable checking the E-Media, you may ask for help by calling your Security and Software Assessment Services (SSAS) software sector contact (see page 19). Please feel free to ask for assistance from your SSAS contact for either further explanation of the instructions or actual review of the E-Media.

When information is given as a hardcopy, you check for:

- Skewed pages
- Unreadable text
- Graphs that run off the page
- Fuzzy images
- Etc.

If you observe any of the above anomalies, you would contact the Project Manager (PM) or appropriate personnel and request a new hardcopy from which to make the distribution copies. Similarly, the E-Media review (quality review) requires that all files on the distribution media be checked for:

- Unopenable files
- Instructions (e.g. Readme.txt) on:
 1. How to use the media
 2. Where to use the media
 3. Purpose of the media
 4. Computer System Requirements
 5. Correct Contact Information
- Are the instructions clear or not?
- Broken links (i.e., don't take you to the text you expect to see)
- Skewed text
- Unreadable text
- Unclear error messages
- Etc.

Similarly, if you observe any of the anomalies above, contact the PM and request a new file or new CD. The instructions provided in this guide will help you review E-Media proceedings and will help you make the determination as to whether or not the proceedings are acceptable to be sent to EPRI customers.

Review Instructions

1. **E-Media ID Number** - When given a CD or DVD for copy and distribution, the first step is to assign it an E-Media identification (ID) number, which identifies it as the “Master” copy. Simply handwrite the ID number onto the media using a black permanent pen/marker. The master will be used as the distribution copy from which all future copies will be generated. Write the E-Media ID # on each e-media item. The following format is recommended: YYMMDD

- Example 1 - If the proceedings you need to distribute was received on June 24, 2011, the E-Media ID # would be 110624.
- Example 2 - If the proceedings you need to distribute was received on November 12, 2011, the E-Media ID # would be 111112.

Note: Should you encounter a problem with the media and need a new one, it is recommended that you increment the ID # to something like 111112-2.

2. **Virus Scan** - Before opening any files on the CD or DVD, you must virus scan all the files on the media. Below are instructions (with screen captures) for virus scanning all files using *VirusScan Enterprise + AntiSpyware 8.5.0i* on Windows XP, Vista, or Win 7. If you do not have VirusScan installed, please call your ITApps support person.

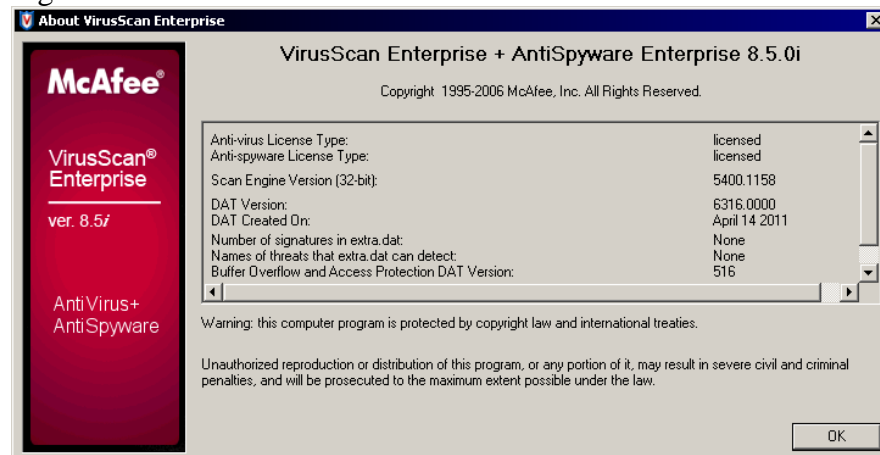
- First, right-click your mouse over the *VirusScan* icon (Shield shape) located in the *Start menu clock task bar* (circled in *Figure 2-1* below), which opens a small window with several options.

Figure 2-1



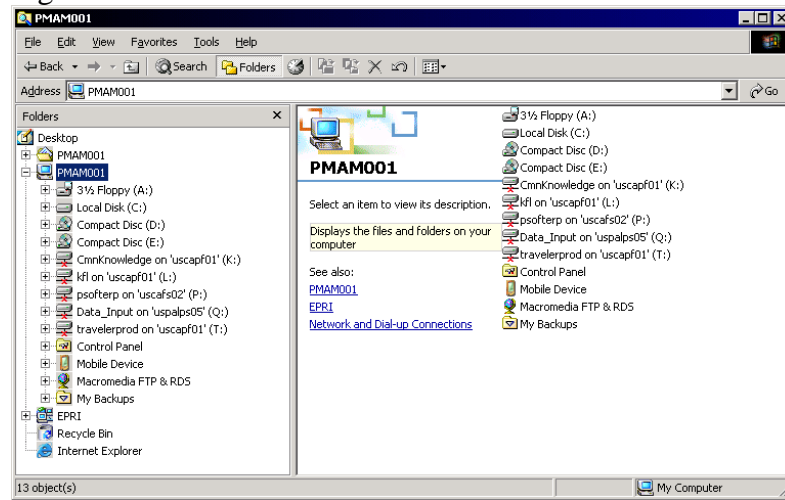
- Click on the “*About VirusScan Enterprise...*” option, which opens *Figure 2-2* below and allows you to view which virus definitions are installed into your computer.

Figure 2-2



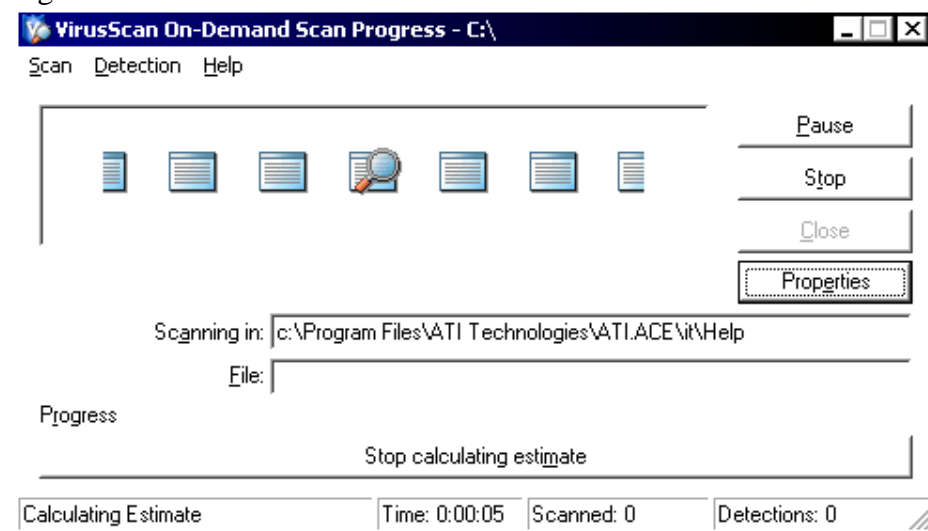
- It is important to update the virus definitions on a regular basis, at least once every week. View the virus definitions version and the date it was created on (shown in *Figure 2-2*). If the created date is more than a week old from today’s date, please update the definitions now. To update Virus Scan, repeat step one and click on the “*Update Now...*” option and follow the instructions on your screen. You may call your IT support person to setup Virus Scan to update itself automatically.
- To perform a quick virus scan:
 - a. Open *Windows Explorer* and locate the folder or distribution media location (D or E drive) that you wish to virus scan, as shown in *Figure 2-3* below.

Figure 2-3



- b. Once you locate the content you wish to virus scan, right-click on it and select the “*Scan for viruses ...*” option, which starts the Virus Scan application and automatically scans (see *Figure 2-4*) the content.

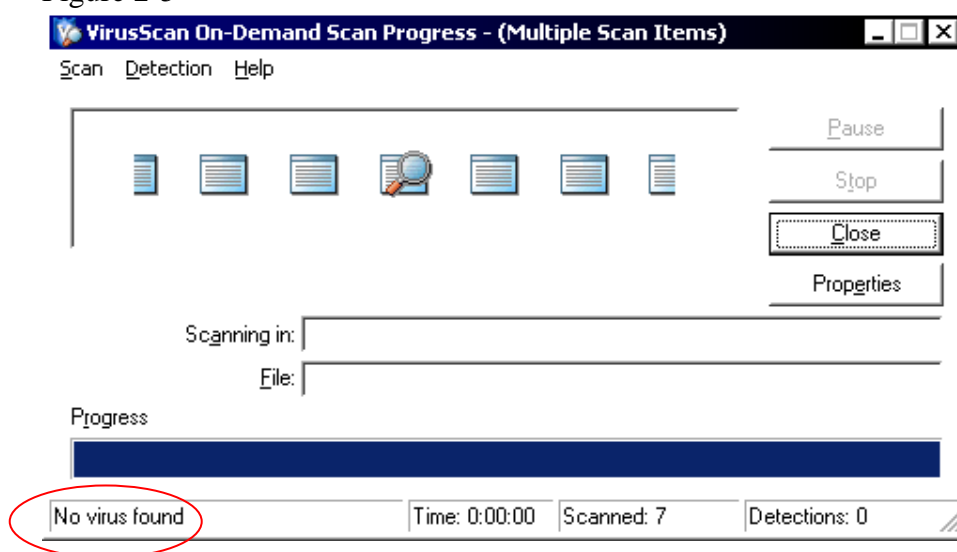
Figure 2-4



- c. After the virus scan process is completed, if any viruses are observed, they will be listed for you. If no viruses are located, you will receive a “No virus found” message as seen in *Figure 2-5* below.

You may close the application at this point and move to the next step.

Figure 2-5



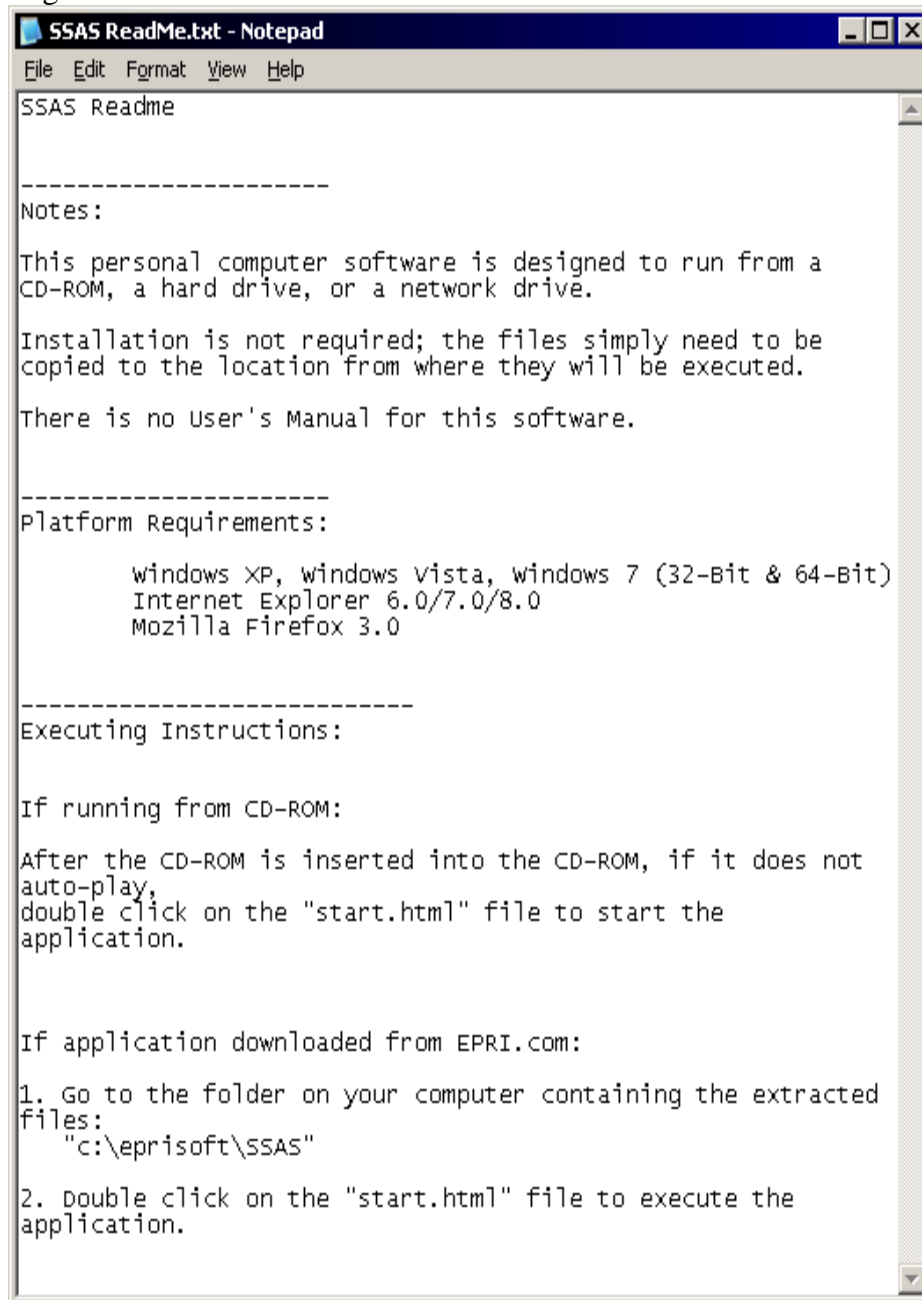
3. **Instructions (Readme.txt)** - When you review the E-Media files, if you cannot determine what to do with them or how to run them, there is very good chance that neither will the customer. All E-Media should have a Readme.txt file (or Readme.doc file or Readme.pdf file) that contains the following:

- Welcome message and reason the user should continue to look at this CD or DVD.
- Computer System Requirements (e.g., Windows XP/Vista/Win 7; MS Office 2003/2007, Acrobat Reader 9.0, etc.)
- How to use this CD (i.e., This CD contains documents from the meeting with the Nuclear group, meeting date 06/24/2011.).
- Contact information in case there are any questions (e.g., Project Managers or an appropriate e-mail address or general EPRI contact information (askepri@epri.com, 1-800-313-3774))

Figure 3-1 below shows a sample Readme.txt. The sample Readme.txt contains the following requirements:

- Title
- Notes
- Platform Requirements
- Executing Instructions

Figure 3-1

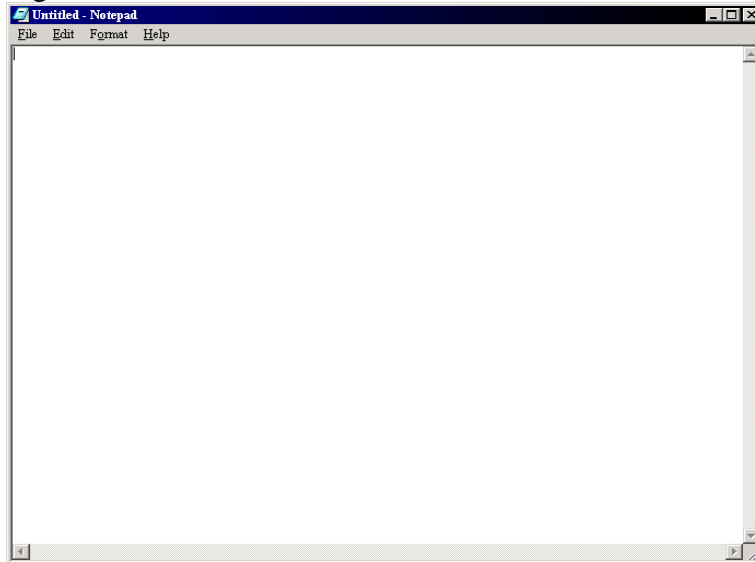


When reviewing Readme.txt files, please look for the specific items listed above. If an item is missing, contact the PM and ask that the information be provided.

Creating a Readme.txt – For all but the simplest E-Media (e.g., one MS Word file), you will look for or create a Readme.txt file that tells the user what is on this CD (or DVD) and how he can use the information. Your sector or area may develop generic wording for readme.txt files, or you may need to talk with the person who gave you the CD to get the information. If you are asked to create this file, follow the steps below.

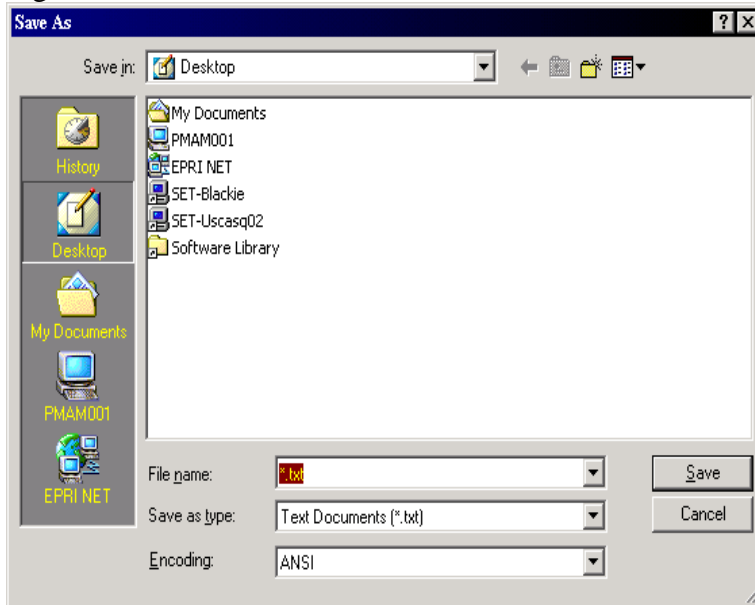
- First, locate and open the *Notepad* application (shown in *Figure 3-2* below) from your computers *Start* menu.

Figure 3-2



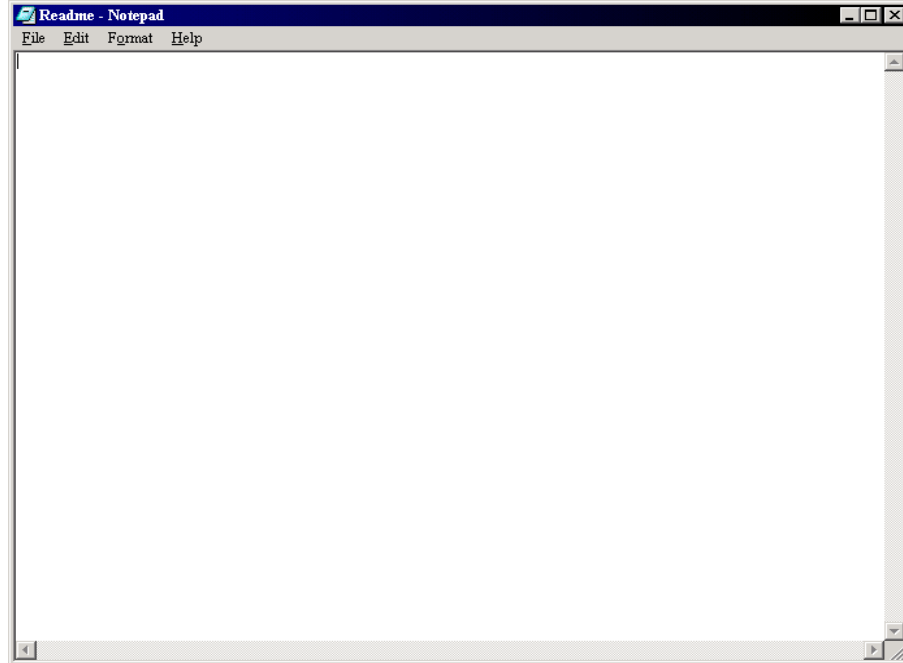
- Notice that the screen is blank and the document is untitled (shown in *Figure 3-2*). Click on the *File* menu and click on the “*Save As...*” option, which opens *Figure 3-3* below.

Figure 3-3



- Type in “*Readme*” over the existing “**.txt*” text (shown in *Figure 3-3*), locate or create a temporary folder or directory where you will save this file. Click on the Save button to save the file, resulting in *Figure 3-4* below.

Figure 3-4



- *Figure 3-4* is the Readme.txt file you need to place with the other E-Media files. Simply add the required information (e.g. title, description, requirements, etc.) and save the file again.
 - When the Readme.txt file is complete, burn a new E-Media distribution CD using the original E-Media files and the new readme file.
 - Assign the new distribution CD or DVD an E-Media ID #. If the E-Media ID # on the new CD is the same as the ID # on the original CD, increment the ID #.
4. **Open All Files** - Once the Readme.txt review has been completed, open all files in the CD or DVD with the following file formats listed below. Check that they can be opened without error. Scan the contents of document files (i.e. .doc, .pdf, etc.) for skewed pages, missing pages, broken links, etc. Scan the contents of media files (i.e. .avi, .mp3, etc.) for clarity, appropriate pictures and sounds, etc. Note any problems observed. *Figure 4-1* and *Figure 4-2* below show the files of a sample E-Media.
- Adobe Acrobat (.pdf)
 - Audio (.wav .mp3)
 - Graphic (.gif .bmp .jpeg)
 - Microsoft Excel (.xls)
 - Microsoft Word (.doc)
 - Movie (.avi .mpeg)
 - Microsoft Power Point (.ppt)
 - Text (.txt)
 - Web (.htm .html)
 - Zip (.zip)

Figure 4-1

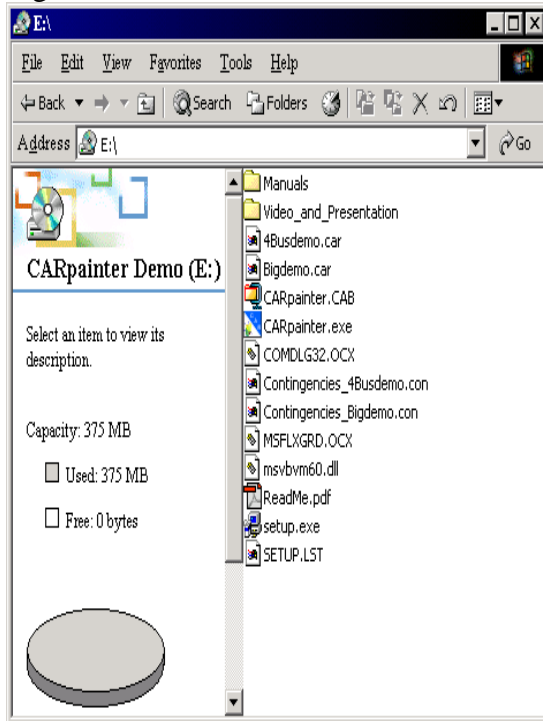
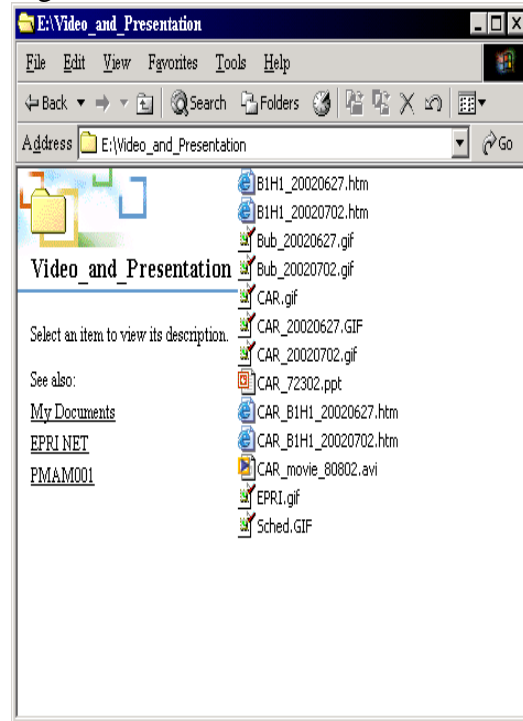
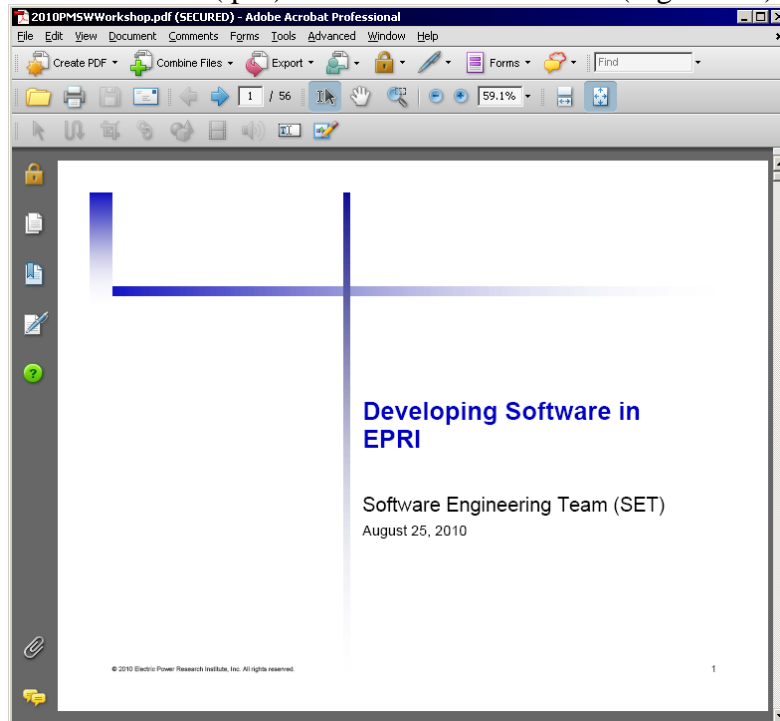


Figure 4-2

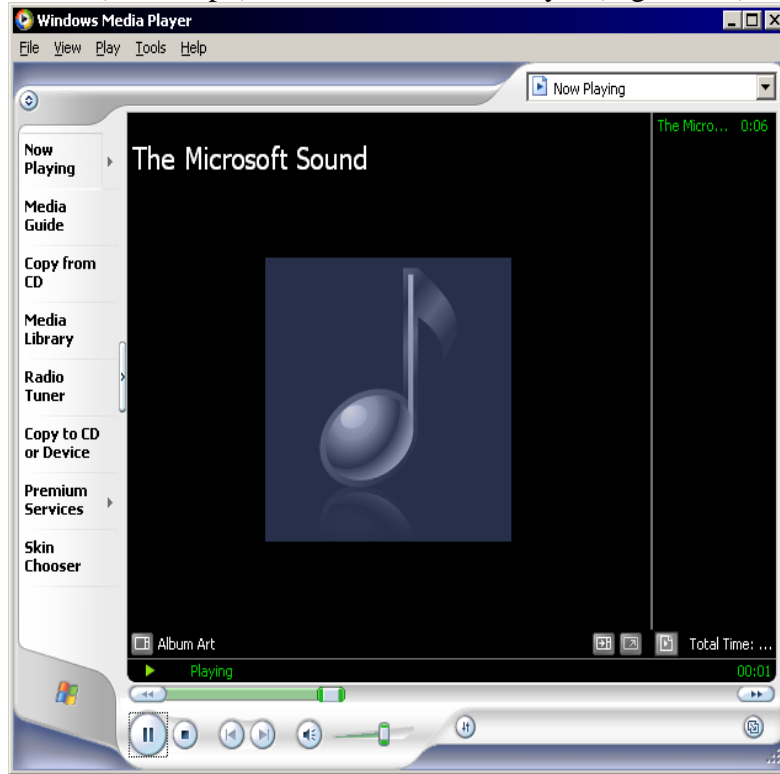


Below are the most common file types used at EPRI and the most common application used to open and view them. Provided is a screen capture containing the default application and an example file for each file type.

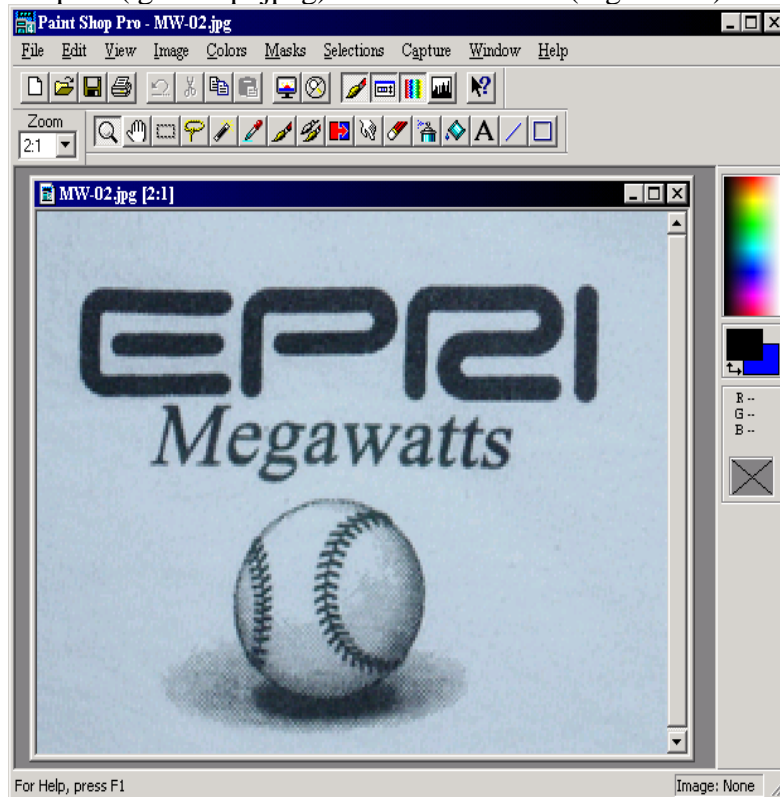
- Adobe Acrobat (.pdf) – Adobe Acrobat Reader (Figure 4-3)



- Audio (.wav .mp3) – Windows Media Player (Figure 4-4)



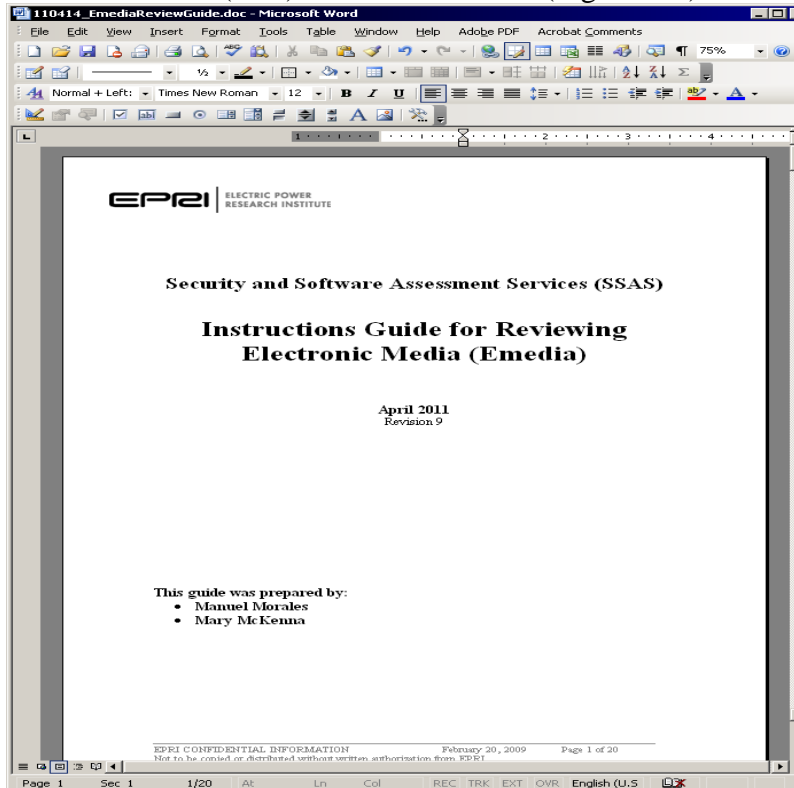
- Graphic (.gif .bmp .jpeg) – Microsoft Paint (Figure 4-5)



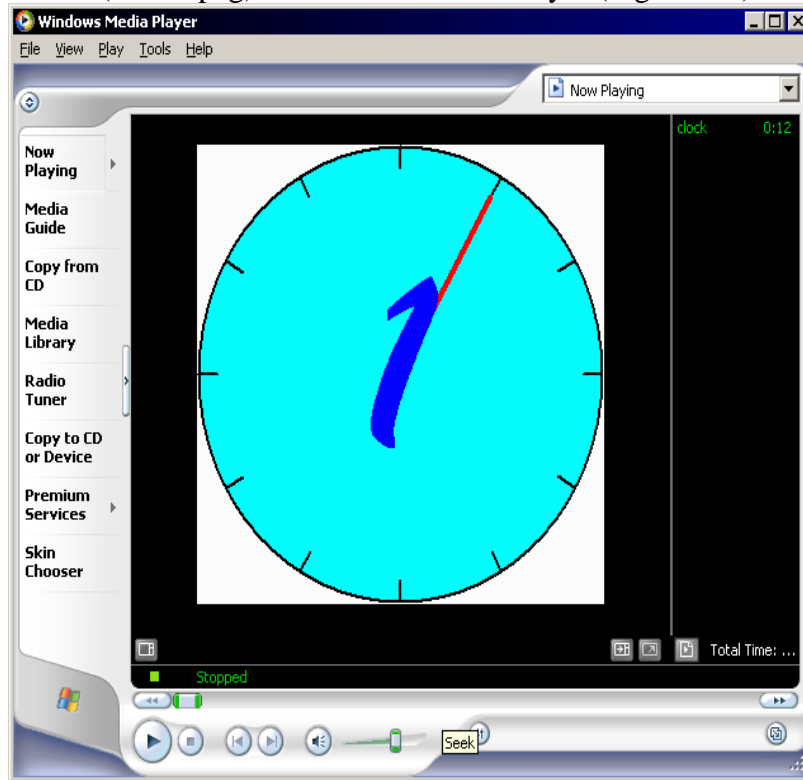
- Microsoft Excel (.xls) – Microsoft Excel (Figure 4-6)

	A	B	C	D	E
1	EPRI Sector	Manager	Product Id	Product Description	In Portfolio
2	Environment	Goodman, Naomi L	1021732	PISCES database	In Portfolio
3	Environment	Goodman, Naomi L	1021733	TRI for Power Plants	In Portfolio
4	Environment	Goodrich-Mahoney	1021729	Dynamic Mercury Cycling Model V4.0	In Portfolio
5	Environment	Kavet, Robert I.	1021734	EMFWorkstation 2011	In Portfolio
6					
7	Generation	Altman, Art M.	1022516	Energy Book System (EBS) v7.0	Post Portfolio
8	Generation	Glanton, Darryl Brit	1021720	Development of New Flow-Accelerated	In Portfolio
9	Generation	Grace, Dale Stewa	1021727	CTCC O&M Cost Analyzer: Update Ver	In Portfolio
10	Generation	Grace, Dale Stewa	1021728	CTCC O&M Cost Analyzer, Version Up	In Portfolio
11	Generation	Hesler, Stephen H.	1020749	O&M Excellence - Plant View	Added Post Si
12	Generation	Hollingshaus, John	1021724	Fossil Component Remaining Useful Lif	In Portfolio
13	Generation	Noce, Gary J.	1021725	Criteria for Assessing Predictive Mainte	In Portfolio
14	Generation	Noce, Gary J.	1022427	PlantView Predictive Maintenance (PdM	Added Post Si
15	Generation	Noce, Gary J.	1022430	Maintenance Basis Optimization	Added Post Si
16	Generation	Noce, Gary J.	1022433	Diagnostic Advisor	Added Post Si
17	Generation	Noce, Gary J.	1022436	PlantView Event Report Module Version	Added Post Si
18	Generation	Noce, Gary J.	1022439	PlantView Corrective Action Program M	Added Post Si
19	Generation	Noce, Gary J.	1022442	Generation Capability Report	Added Post Si
20	Generation	Noce, Gary J.	1022445	PlantView - LogBooks Module Version	Added Post Si
21	Generation	Noce, Gary J.	1022448	Automated Training Manager	Added Post Si
22	Generation	Noce, Gary J.	1022451	Alarm Response	Added Post Si
23	Generation	Noce, Gary J.	1022454	Report Library & Component Assesment	Added Post Si
24	Generation	Noce, Gary J.	1022457	Risk Assessment	Added Post Si
25	Generation	Noce, Gary J.	1022460	Comparative Analysis	Added Post Si
26	Generation	Noce, Gary J.	1022463	Self Assessment	Added Post Si
27	Generation	Noce, Gary J.	1022466	System Health	Added Post Si
28	Generation	Noce, Gary J.	1022470	Admin User Manual	Added Post Si
29	Generation	Stein, Jan	1022501	Interpretation of Electromagnetic Signat	Post Portfolio
30					

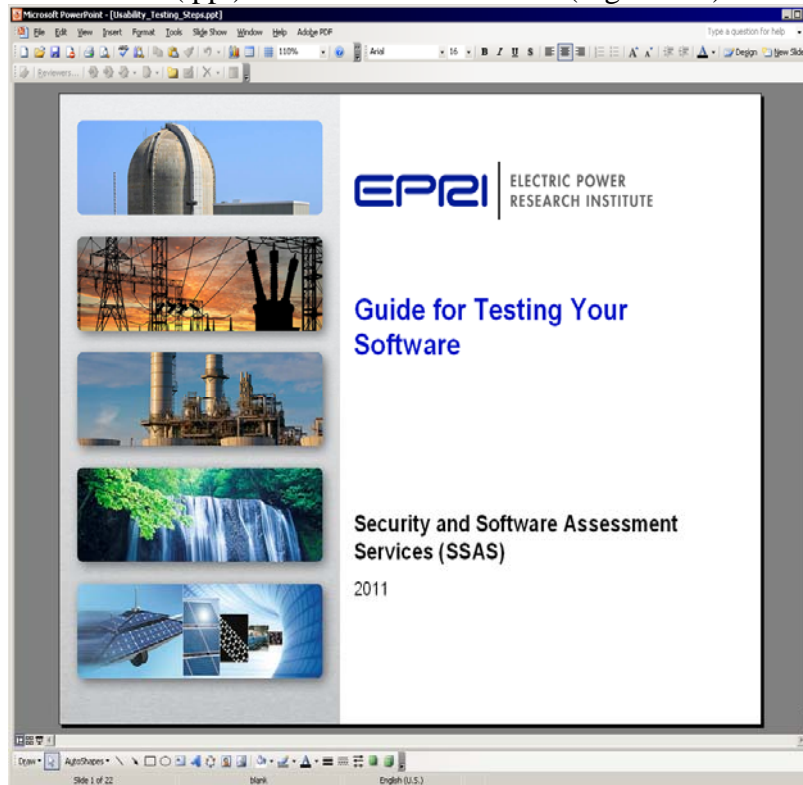
- Microsoft Word (.doc) – Microsoft Word (Figure 4-7)



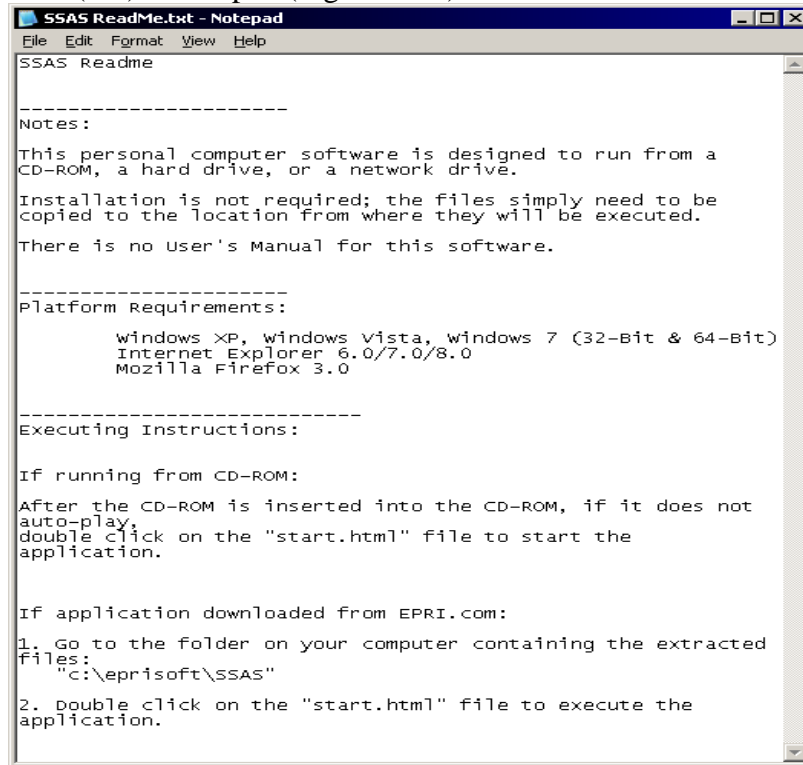
- Movie (.avi .mpeg) – Windows Media Player (Figure 4-8)



- Power Point (.ppt) – Microsoft PowerPoint (Figure 4-9)



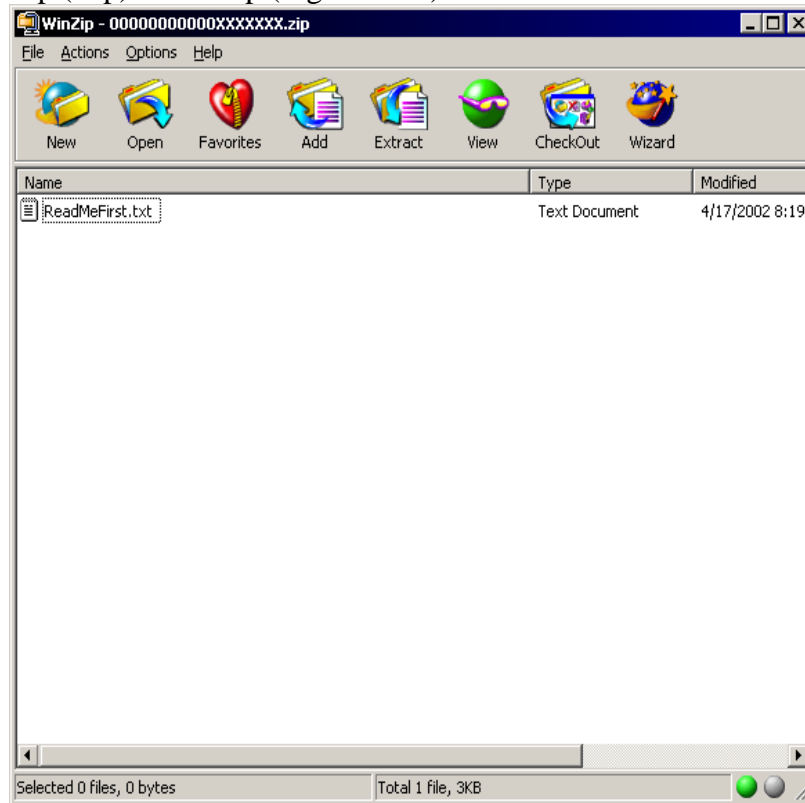
- Text (.txt) – Notepad (Figure 4-10)



- Web (.htm .html) – Internet Explorer (Figure 4-11)



- Zip (.zip) – WinZip (Figure 4-12)



When opening each file, observe the file extension and check that the appropriate program opens the appropriate file. In some cases, the same file may be opened by different programs, which may cause the document to lose special formatting options and/or functions. Note any problems observed.

When viewing screen captures, pictures, movies and graphics, and listening to sound, if the content does not seem like standard EPRI material, check for copyright notices acknowledging other company's work with the image, or in the front of the User Guide along with EPRI copyright, or in the Help |About. If no copyright acknowledgement is present, contact the PM for confirmation of permission to use the copyright material and be sure to add the permission for use after consulting with EPRI Legal. For example, if you hear a movie theme or see a picture of a commercial cartoon character, EPRI must get permission to use any of these commercial copyrighted items. That permission must be noted in the document/website/etc. where the copyrighted material is used. Note any problems observed.

As you review the files on the CD (or DVD), you will also be looking for files that have the extension .exe (i.e. setup.exe), which typically executes a software installation process. You will also be looking for Microsoft Excel (.xls) spreadsheets that contain functions and formulas (Macros), not just text data. If these files are observed, it is likely that software is present on the media and must be tested by SSAS. If this occurs, please contact Manuel Morales (650-855-8743) for assistance.

Also contact Manuel if you cannot determine if the CD contains software and would like a review of the CD.

When software is observed on the CD or DVD, you may encounter files with the following extensions:

- .ini
- .dll
- .exe
- .ocx
- .hlp
- .inf
- .cpl
- .cab
- .com
- .bat
- .sql
- .log
- etc.
- or the above with an underscore “_” replacing the last letter such as .in_, .dl_, .ex_, etc.

If you double click on any of these “unknown” files, *Figure 4-13* will open. If you click on the *Open with...* button, *Figure 4-14* will open, allowing you to select any program on your computer to try and open the file with. This can result in undesired results. Instead, click on the *Cancel* button on either *Figure 4-13* or *Figure 4-14*.

Figure 4-13

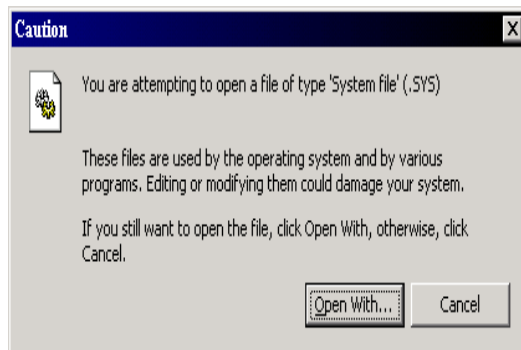


Figure 4-14



If these types of files are observed, the media needs to be checked for software, contact Manuel Morales (650-855-8743) for assistance. If it is determined (by you, or Manuel) that no software is present on the CD, ask the PM to explain the purpose of the file. If the file in question is not intended for the user, but it supports a different file in the E-Media, make a note of it in the Readme.txt. At this time, also notify the PM of any additional anomalies observed while reviewing the E-Media. Make a list of all problems observed and send it to the PM. Contact the PM to discuss a resolution.

5. **Accepted for Distribution** - If no anomalies were observed on the CD or DVD, all files are usable and the Readme.txt file is complete and accurate, the E-Media is acceptable for distribution and you are then ready to copy and label the media.

However, if the distribution media has errors, the E-Media is not acceptable for distribution until the anomalies have been addressed and fixed. Please contact the PM to discuss a resolution.

If you are not sure of whether an anomaly you observed is enough to require that changes be made, contact Mary McKenna (650-855-7931) or Manuel Morales (650-855-8743) for assistance in determining the severity of the problem.

6. **Burning Distribution CD** - Use a CD burner that has error correction built-in. The CD burner offered by the EPRI Help Desk is an excellent burner and offers good assurance that the copies made are accurate. Only make copies from the “Master” CD, which was reviewed by you. To check that you copy from the correct CD, check for the E-Media ID # you marked on the CD at the beginning of this review process.

Once copies have been made from the “Master” copy, take a few random samples (1 or 2 per batch copied) and perform a quick review by placing each copied sample CD in at least two different computers and checking that the copies are usable. Sometimes, CDs will not copy correctly, which you will observe immediately after placing it in the computers because error messages will come up right away.

7. **Labeling Distribution CD** - The EPRI Help Desk has a CD labeler. Be sure to add the EPRI copyright at the bottom of all labels. The label should include, at a minimum,

- Title of the project and version or date
- Apollo number (if applicable)
- EPRI logo
- EPRI Copyright (“Copyright © 2011 Electric Power Research Institute, Inc. All rights reserved.”)

Other items that may be added are:

- Computer System Requirements for looking at the CD or DVD
- Instructions for starting/using the CD or DVD
- The PMs name and contact information
- EPRI Askepri data, e.g., askepri@epri.com; 1-800-313-3774; www.epri.com

Final Notes

- If there is software on the CD or DVD, the software **MUST** be tested (contact Manuel Morales (650-855-8743)) and the distribution **MUST** be through the EPSC (contact Colette Handy (704-595-2733)). As you review the files on the CD, you will be looking for files that have the extension .exe, or need installation through a file known as “setup.exe” or an extension (.xls) that is a spreadsheet that contains more than just text data. If you are not sure, you can ask Manuel to review the CD for you to check for software.
- If the CD or DVD does not contain software, it must be checked by you or, if it is very complicated, by SSAS (contact Manuel Morales (650-855-8743)). SSAS will be happy to assist you in checking your E-Media.
- Do not be intimidated by someone who tells you, “that’s the way it is – we can’t do anything about it.” We can do something about it and we need to raise awareness of our customer’s right to receive a useable product. If there is an issue that will damage EPRI’s reputation, it needs to be addressed before it gets to the customer.

For Additional Information

If you have questions while reviewing E-Media, please contact the person noted below:

- Mary McKenna (650-855-7931) – Software Quality Manager (SQM)
- Colette Handy (704-595-2733) – Software Distribution (EPSC)
- Renee Morell (650-855-2147) –Publishing
- York Huang (650-855-2018) – Export Control
- Manuel Morales (650-855-8743) – E-Media Testing

SSAS Software Sector Contacts:

- Tien Luong, (650) 855-2327, tluong@epri.com (Nuclear)
- Manuel Morales, (650) 855-8743, mmorales@epri.com (Power Delivery & Utilization (PDU))
- Rachel Ostraat, (650) 855-2342, rostraat@epri.com (Environment and Generation)

QUICK GUIDE

Step	√	Actions to check
1		Write the E-Media ID # on each e-media item (i.e., CD, DVD, etc) received for review in the YYMMDD format (i.e., June 24, 2011 is “SQA 110624”)
2		Before opening any files on the CD or DVD, you must virus scan all the files on the media. <ul style="list-style-type: none"> • See page 5 for virus scan instructions
3		All E-Media should have a <i>Readme.txt</i> file or an instructions document. <ul style="list-style-type: none"> • See page 7 for Readme.txt requirements • See page 9 for instructions on creating a <i>Readme.txt</i> file
4		Open all the files to check that they are openable without error and scan the contents looking for: skewed pages, broken links, etc. <ul style="list-style-type: none"> • See page 10 for a list of the most common files used at EPRI and the most common programs used to open and view them.
5		Distribution Acceptance after review. <ul style="list-style-type: none"> • If the CD or DVD has no errors, all files are usable and the <i>Readme.txt</i> file is complete and accurate, the E-Media is acceptable for distribution and you are then ready to copy and label the media. • However, if the media has errors, the E-Media is not acceptable for distribution until the anomalies have been addressed and fixed. Please contact the PM to discuss a resolution.
6		Use a CD burner that has error correction built-in. <ul style="list-style-type: none"> • The CD burner offered by the EPRI Help Desk is an excellent burner and offers good assurance that the copies made are accurate.
7		The Help Desk also has an excellent CD labeler. The label should include, at a minimum: title of the project and version or date, Apollo number (if applicable), EPRI logo, and EPRI Copyright. <ul style="list-style-type: none"> • See page 18 for optional label items.
8		If you have questions while reviewing E-Media, please contact the person noted for your sector. <ul style="list-style-type: none"> • See page 19 for Security and Software Assessment Services (SSAS) contact information