

efa Documentation

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eFa is a platform for the implementation of electronic case files for acquisition of participant and entity data in especially but not only in European Social Fund (ESF) funded programs.

eFa is an acronym for the german word “elektronische Fallakte” and provides the data acquisition of minimal indicators for participant and entities and projects as defined in the the EU regulation 1303/2013 and 1304/2013. It further let you save some master data on participants. As a platform eFa allows you to enhance the basic data model to implement national and operations specific data.

Contents:

1.1 Source

1.2 Installation

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1.5 Support

1.5.1 Report Bugs

1.6 Contribute

Your contribution is highly appreciated!

1.6.1 Feedback

Please report all defects or feature requests to the official [Ticket System](#)

1.6.2 Translations

Translations of on Transifex. There are separate projects for the application and the documentation.

- [Application translation](#).
- Documentation translation coming soon.

Specification

2.1 Roles

There are two different actors with in eFa with different tasks. The following roles in the system will reflect the daily work of the actors. Therefor they are only allowed to work on certain modules.

The table in the following sections will give an overview of the roles permissions on the different modules. *x* means is allowed, *o* means is not allowed. On modules which are are not listed here, the does not have any permissions.

Note: The permissions of the different roles do not reflect which modules are shown in the header menu of the UI. So a user who is basically allowed to read or list items of a module must not necessarily see the module entry in the header menu.

2.1.1 User

All users in the system will have the *User* role. Users with this roles are allowed to worked with some supportive functionality.

Module	List	Create	Read	Update	Delete	Import	Export
Profile	o	o	x	x	o	o	o

2.1.2 Useradmin

The useradmin will administrate the user accounts in the application. Additionally the useradministration can

- Change the password of a user.
- Transfer the participations including all depended parts from one user to another user within the same organisation.

Module	List	Create	Read	Update	Delete	Import	Export
Users	x	x	x	x	x	o	o
Usergroups	x	x	x	x	x	o	o
Roles	o	o	x	o	o	o	o
Profile	x	o	x	x	o	o	o

2.1.3 Beneficiary

The beneficiary manages the access of the organisation to the web application. For this the Beneficiary is responsible for

- Administration of operations
- Administration of beneficiaries
- Administration of organisations
- Administration of Projects

Further the beneficiary can get aggregated evaluations for their own statistics and reports.

Important: This is an administrative account. That means the user will have access to all entries of the following modules.

Module	List	Create	Read	Update	Delete	Import	Export
Operations	x	x	x	x	x	o	o
Beneficiary	x	x	x	x	x	o	o
Organisations	x	x	x	x	x	o	o
Projects	x	x	x	x	x	o	o

2.1.4 Organisation

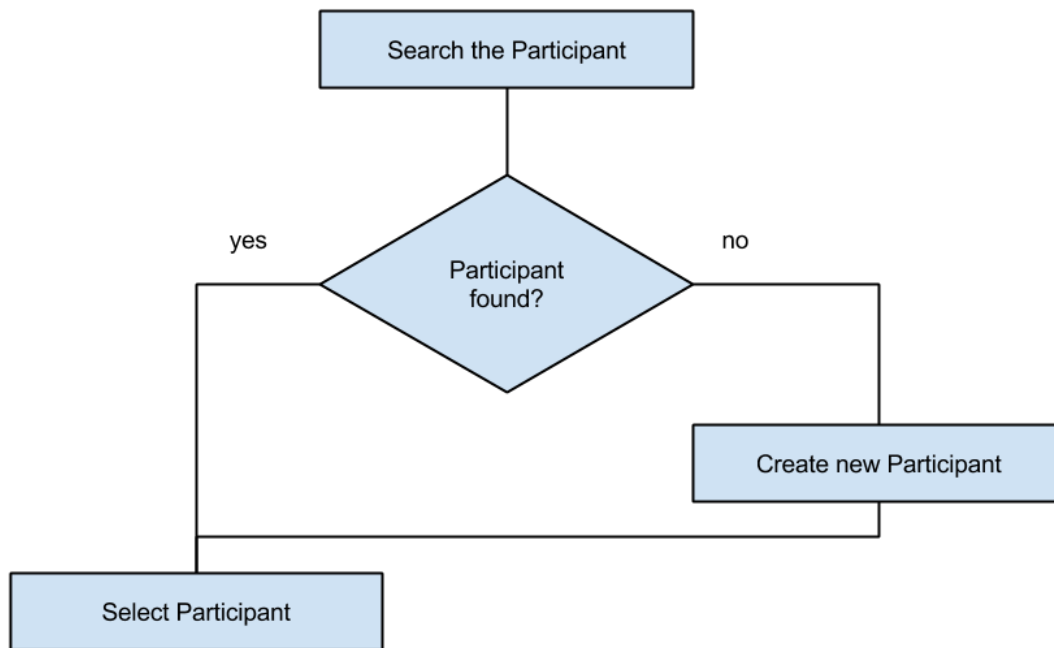
The organisation accompany the participants and document their work in the electronic files.

Users with this role will have access to the master data of the participant and only to the participations data of the accompaniment they perform.

Module	List	Create	Read	Update	Delete	Import	Export
Operations	o	o	x	o	o	o	o
Organisations	x	o	x	o	o	o	o
Projects	x	o	x	o	o	o	o
Participants	x	x	x	x	x	o	o
Participations	x	x	x	x	x	o	o

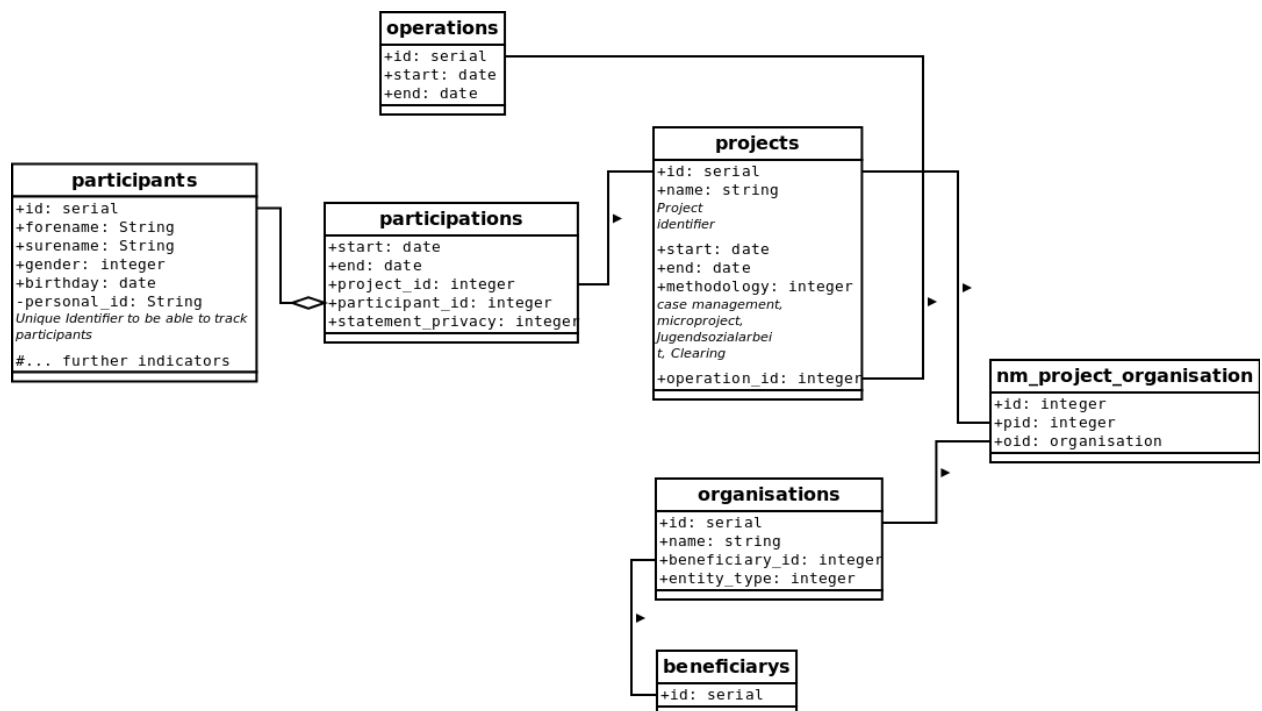
2.2 Use Cases

2.2.1 Add new Participant



2.2.2 Revoke privacy statement

Model



3.1 Participant

3.2 Participation

3.3 Outputindicators

3.4 Resultindicators

3.5 Project

3.6 Operation

3.7 Organisation

3.8 Beneficiary

Terminology

4.1 German

For the german operations like

- “Jugend Stärken im Quartier”

the following translation of the terminology has been proven to be valid:

English	German
Participant	Teilnehmer
Participation	Teilnahme
Project	Projekt, Angebot
Organisation	Träger, Projektumsetzer
Operation	Förderprogramm
Beneficiary	Zuwendungsempfänger, Kommune, Erstbegünstigter

Indices and tables

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