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DATA-PROTECTION TOOLKIT REDUCING RISKS IN HOSPITALS AND
CARE CENTERS

Project N^o 826284

ProTego
**D1.1 Collaborative Working Enviroment and its
maintenance**

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Executive summary

This document describes ProTego Collaborative Working Environment and its maintenance. This platform is used as central tool for project members and envelops the project and consortium information, internal communication, meeting minutes, encompassing a wide set of features in order to manage documentation repository, internal communication, planning, including milestones and tasks scheduling, Issues tracking, software development management and progress Reports management.

The ProTego Collaborative Working Environment is built on SharePoint platform (<https://products.office.com/es-es/sharepoint/collaboration>) which is a Microsoft product that allows you to create websites, in which you can store, organize and share information safely.

The ProTego Collaborative Working Environment is located at the following address:

https://gfiinformatica.sharepoint.com/sites/protego_all

Platform is organized in sections that support activities per each Work Package, cross Work Package collaboration area and area to communicate and share information between project consortium and European Commission (EC) representatives.

To use the platform, each user must have their corporate email account and be invited by the administrator of the platform.

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Table of Acronyms and Definitions

Acronym	Definition
EC	European Commission
WP	Work Package
Apps	Applications
PMB	Project Manager Board
PM	Project Manager

I. COLLABORATIVE WORKING ENVIRONMENT

I.1. Overview

The ProTego Collaborative Working Environment envelops the project and consortium information, internal communication, encompassing a wide set of features covering the following purposes:

- Project documentation repository
- Project internal communication
- Project planning, including milestones and tasks scheduling
- News
- Meeting minutes
- Issues tracking
- Software Development management
- Progress Reports management

The ProTego Collaborative Working Environment is built on SharePoint platform [1] which is a Microsoft product that allows you to create websites, in which you can store, organize and share information safely. The platform is hosted by Microsoft and managed by Gfi as project coordinator. The following features are available in the Collaborative Working Environment:

- Multiple projects support
- Issue tracking system
- Role based access control
- Gantt chart and calendar
- RRSS Feeds & Conversations
- News
- Project documentation (document management system)
- Forums
- Wiki
- Time tracking
- Notepad

I.2. Location

The ProTego Collaborative Working Environment is located at the following address:

https://gfiinformatica.sharepoint.com/sites/protego_all [2]

I.3. Organization

The ProTego Collaborative Working Environment is organized in a main site, which contains a structure of common folder so that all members have access to the entire project. It also has a series of distribution lists with each of the participants of each work package.

I.4. Collaborative tools

The following tools area available per project:

- Overview
- Time Tracking
- Activity
- Calendar
- Issue Tracking
- News
- Wiki

- Conversations
- Planner
- Notepad
- Docs

Within the context of ProTego Collaborative Working Environment, these tools aim to serve multiple purposes, as described in Table 1. These tools can be configured depending on the specific project needs.

Table 1. Platform tools

Tool	Purpose
Overview	Project information aggregator, retrieving information from all project related tools.
Time Tracking	Management and reporting of the consumed effort by resource and task.
Activity	Projects users' activity configurable log to provide visibility on content changes.
Calendar	<ul style="list-style-type: none"> • Project tasks calendar view; • Deliverables and milestones calendar view; • Issues calendar view.
Issue Tracking	<ul style="list-style-type: none"> • Software Change management (bugs & features). • General issues tracking.
News	<ul style="list-style-type: none"> • Publish relevant news to disseminate project relevant information.
Wiki	<ul style="list-style-type: none"> • Knowledge database. • Collaborative creation of content.
Conversations	<ul style="list-style-type: none"> • Emails.
Planner	<ul style="list-style-type: none"> • Task scheduling. • Task management. • Assignment of tasks.
Notepad	<ul style="list-style-type: none"> • Meetings minutes. • Other meeting notes.
Docs	<ul style="list-style-type: none"> • Documentation repository.

II. COLLABORATIVE WORKING ENVIRONMENT ADMINISTRATION

II.1. User Management

II.1.1. Register

In order to start ProTego Collaborative Working Environment, each user must be invited by administrator of the SharePoint platform. A new user has to provide the following information via email to the platform administrator:

- **Email**

After an user sends his mail to the ProTego Collaborative Working Environment, the administrator follows the authorization procedure described in Section II.7.

If an user tries to enter the platform without being invited, the following windows appears.

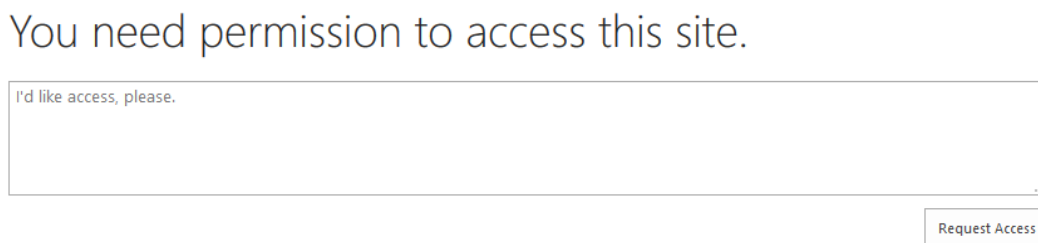


Figure 1. Permission to access

And his email arrives to the administrator of the platform, which accepts or rejects following the procedures described in section II.7.

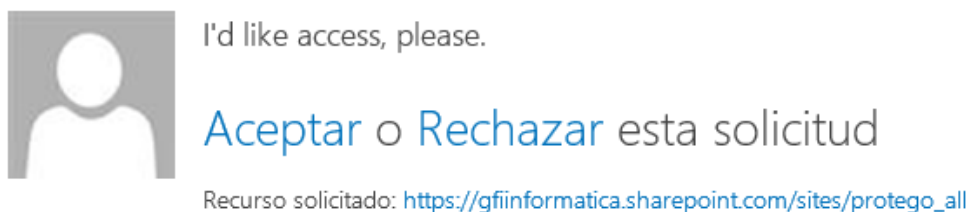


Figure 2. Access request

II.1.2. Email Notifications

The user account settings include a myriad of settings options that can be configured by any registered user according to her/his convenience, as showed in Figure 3.

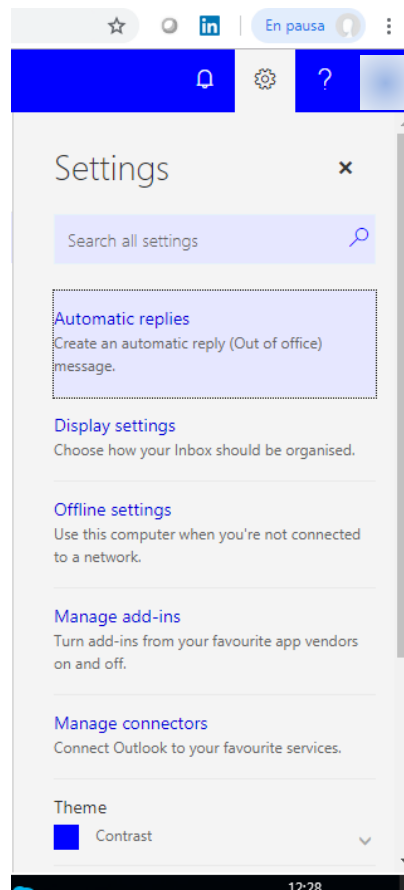


Figure 3. General options

II.1.3. User Roles

The users are assigned by groups (see Figure 4), meaning that an user can have different roles in different groups. The following user roles are available:

- Full Control
- Design
- Edit
- Contribute
- Read

The Full Control has full control over the project settings and related tools management. The Design role can view, add, update, delete, approve, and customize. The Edit role can add, edit and delete lists, can view, add, update and delete list items and documents. The Contribute role can view, add, update, and delete list items and documents. And finally Read role can view pages and list items and download documents.

Permission Level	Description
<input type="checkbox"/> Full Control	Has full control.
<input type="checkbox"/> Design	Can view, add, update, delete, approve, and customize.
<input type="checkbox"/> Edit	Can add, edit and delete lists; can view, add, update and delete list items and documents.
<input type="checkbox"/> Contribute	Can view, add, update, and delete list items and documents.
<input type="checkbox"/> Read	Can view pages and list items and download documents.

Figure 4. Permission level

II.2. Project Settings

The project members with the Full Control role, are able to configure the project settings. In the ProTego Collaborative Working Environment it's possible to configure a wide range of project settings, including:

- Add a page
- Add a app
- Site contents
- Site information
- Site permissions
- Site usage
- Change the look
- Site designs

II.3. Issue tracking workflow

ProTego Collaborative Working Environment supports issue tracking feature. Each issue has an attribute called status. Issue passes through several status. Workflow of these.

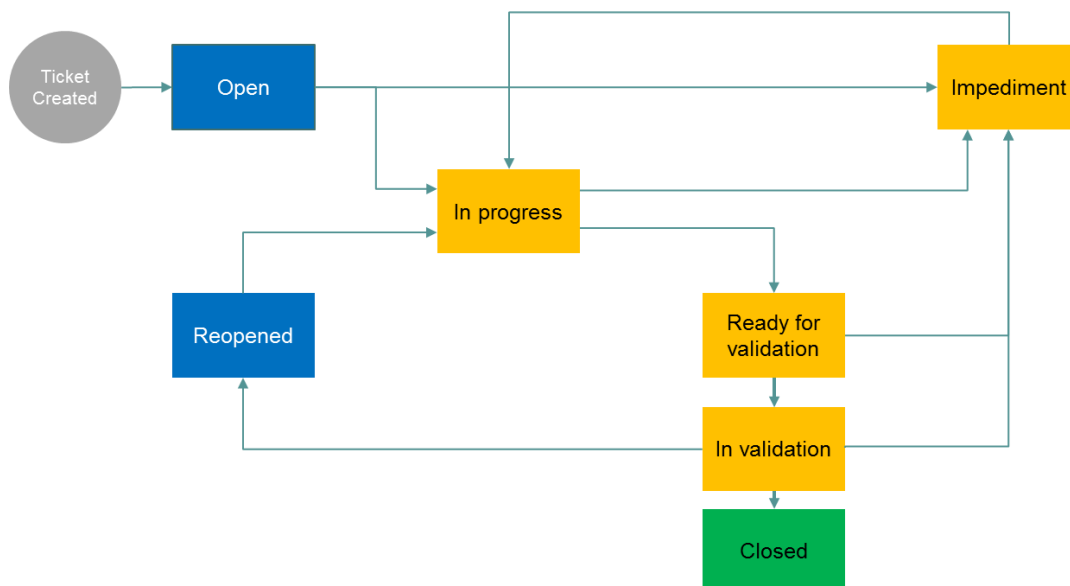


Figure 5. Issues tracking workflow

List of definition of each status is defined in Table 2.

Table 2. Issues status description

Status title	Description
Open	Default status for each issue. It describes that an issue is opened and work is not yet started.
In progress	This issue is in progress.
Impediment	Issue has impediments and cannot continue until impediments resolved.
Reopened	Issue was closed but for some reason is reopened.

Ready for validation	Issue is finished and ready for review and approval.
In validation	Issue is in process of validation.
Closed	Issue is validated, approved and closed.

The platform allows the management and sending alerts when there is a change in the workflow of the incident, as showed in Figure 6 and 7.

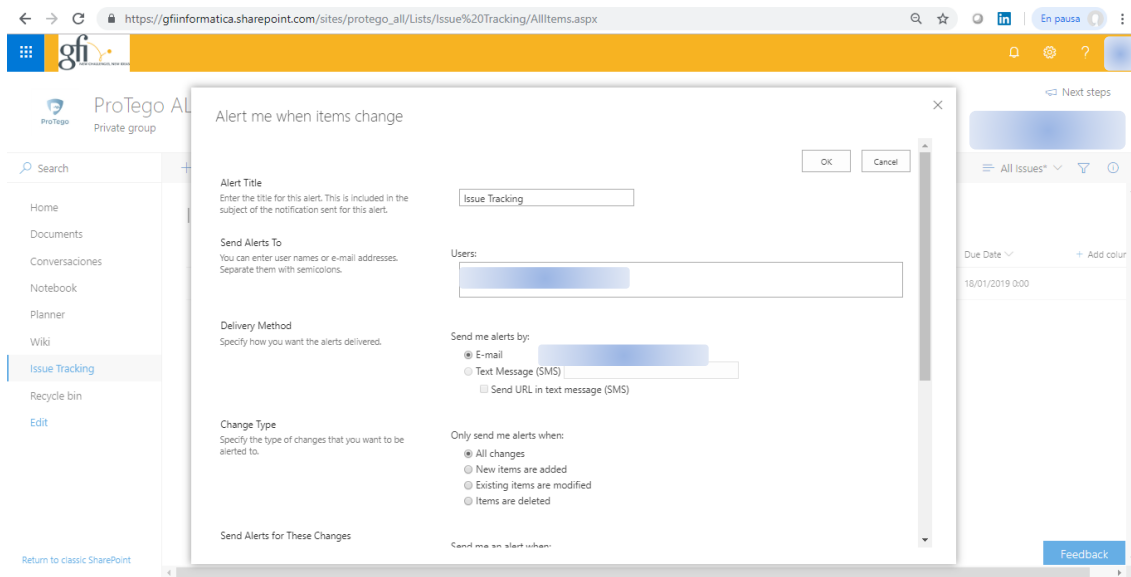


Figure 6. Issue alert I

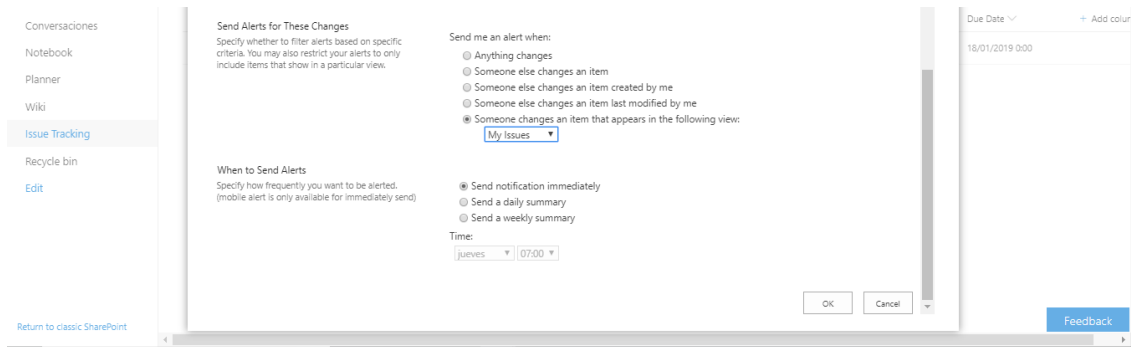


Figure 7. Issue alert II

II.4. Backups

Full backup of the server where ProTego Collaborative Working Environment run, is done daily following the Microsoft directives.

II.5. Security

The security policies of the https://gfiinformatica.sharepoint.com/sites/protego_all are those defined by Microsoft.

II.6. Improvements

ProTego Collaborative Working Environment is customizable and flexible platform. Its customization capacities are supported by Apps (Figure 7) e.g. Discussion Board, Custom List... We can achieve that by installing additional APPs.

Project coordinator will be responsible for detecting such need in close collaboration with other WP leaders and rest of project team and ensure anticipation of requirements through installing appropriate App with technical help of Microsoft.

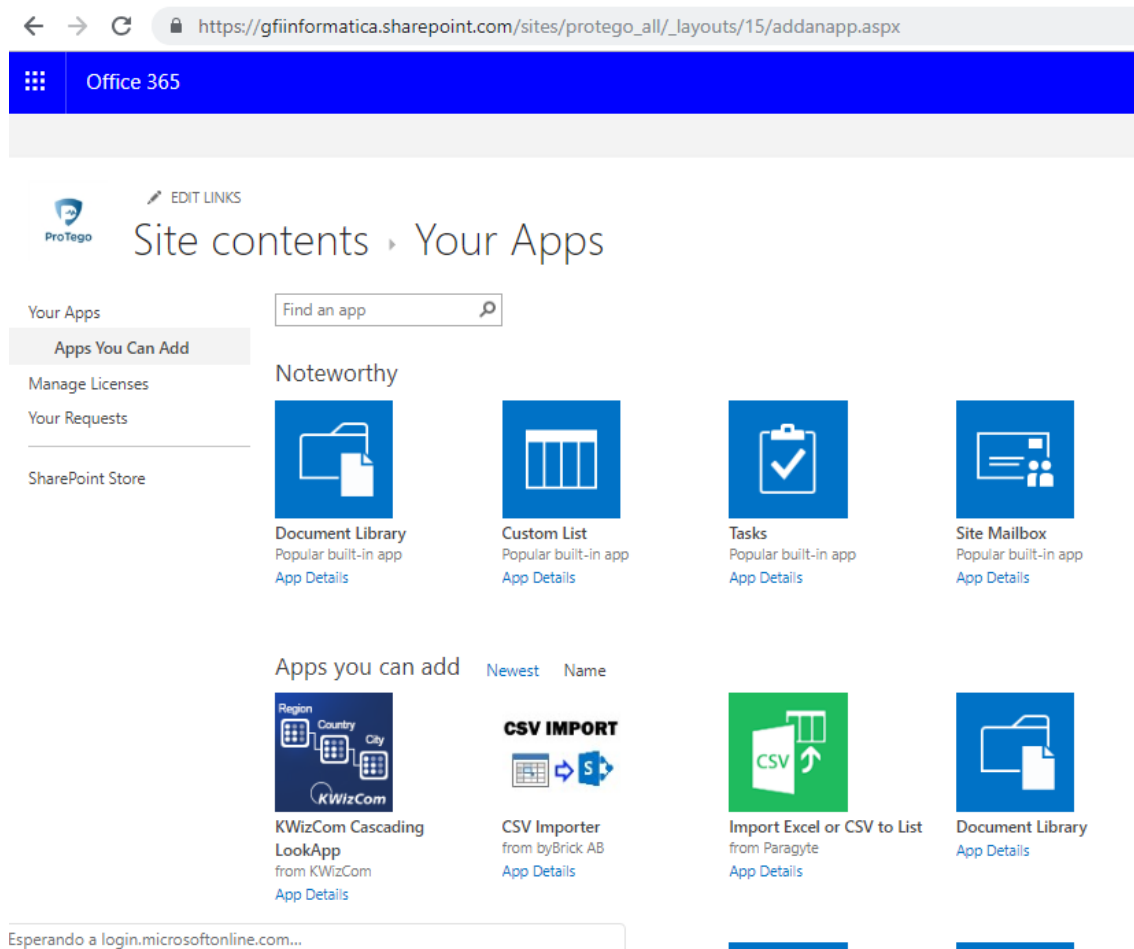


Figure 8. SharePoint APPs

II.7. User role authorisation procedure

To register within ProTego Collaborative Working Environment can be done in two ways:

- The platform administrator adds a new member through his email with guest role (Figure 8).

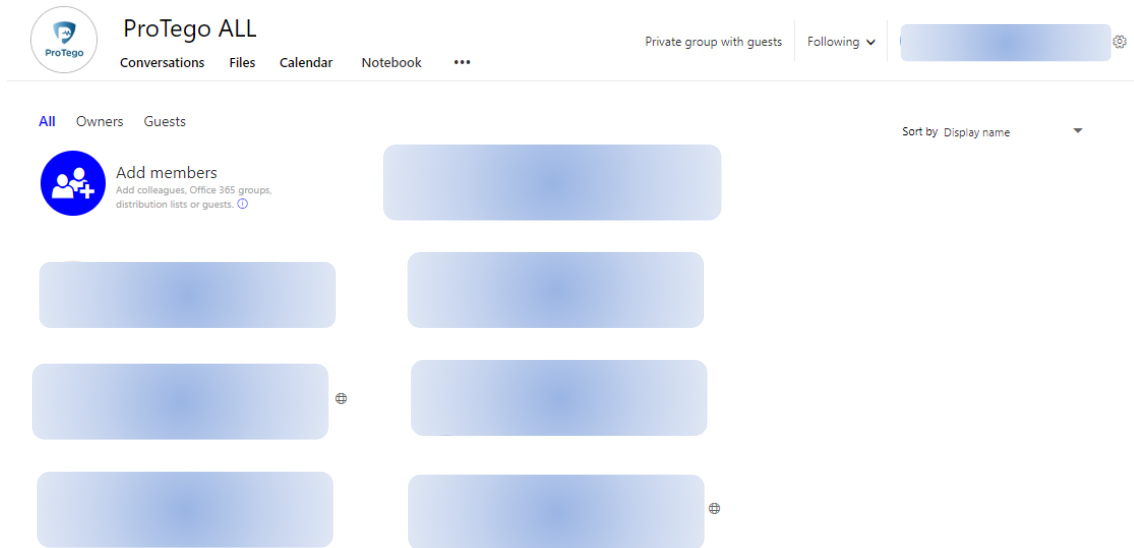


Figure 9. Add a new member on the ProTego platform.

- The new user accesses the ProTego All site and “Request Access”

You need permission to access this site.



Figure 10. Request Access ProTego platform

After request access is done, administrator needs to verify roles in ProTego Collaborative Working Environment for that specific user. For that purpose administrator consults document called “ProTego Mailing List.xls”:

https://gfiinformatica.sharepoint.com/:x:/s/protego_all/EZ6Rlk3-MfVAohXl2ldAtZYBYDcyopasHlt9mToVzztcdA?e=lzn7ks

“ProTego Mailing List” is the document which defines general information about all project members and also defines the group and roles of that person. Consortium partner responsible is accountable for defining access rights for members of her/his organization. If information on person for specific request access is not found in the “ProTego Mailing List” administrator will no approve use of application until information is added in the ProTego Mailing List” document.

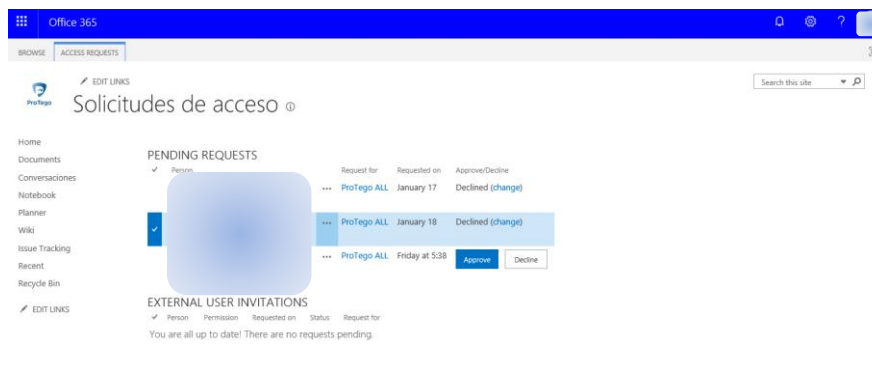


Figure 11. Pending request

III. COLLABORATIVE PLATFORM GUI EXAMPLES

III.1. Internal Project Area

This section contains screenshots from the area of the ProTego Collaborative Working Environment used for the internal knowledge management of the project.

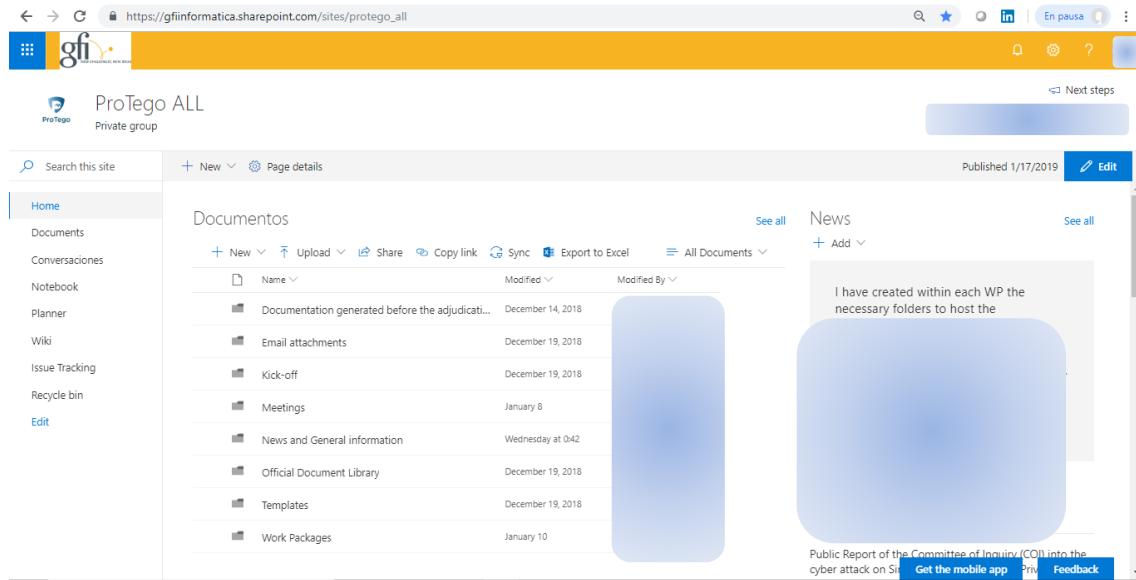


Figure 12. Main page and access to work packages.

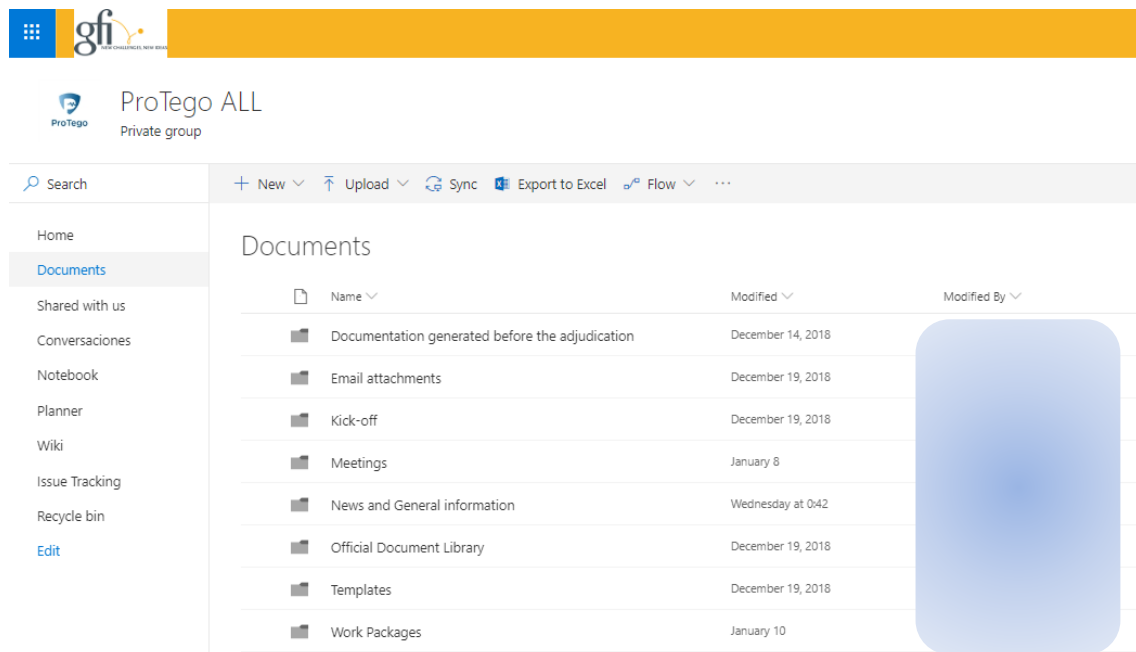


Figure 13. Project example, document content

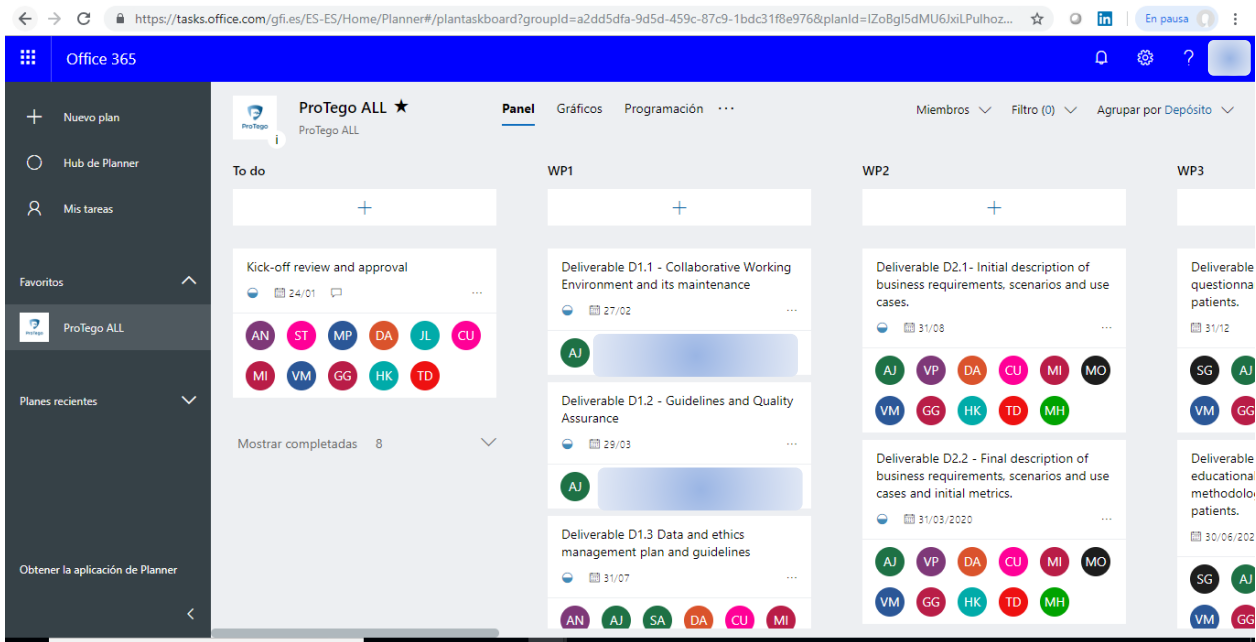


Figure 14. Project example, planner

III.2. Consortium Meeting Minutes

This is the dedicated area of the platform to sharing notes and meeting minutes

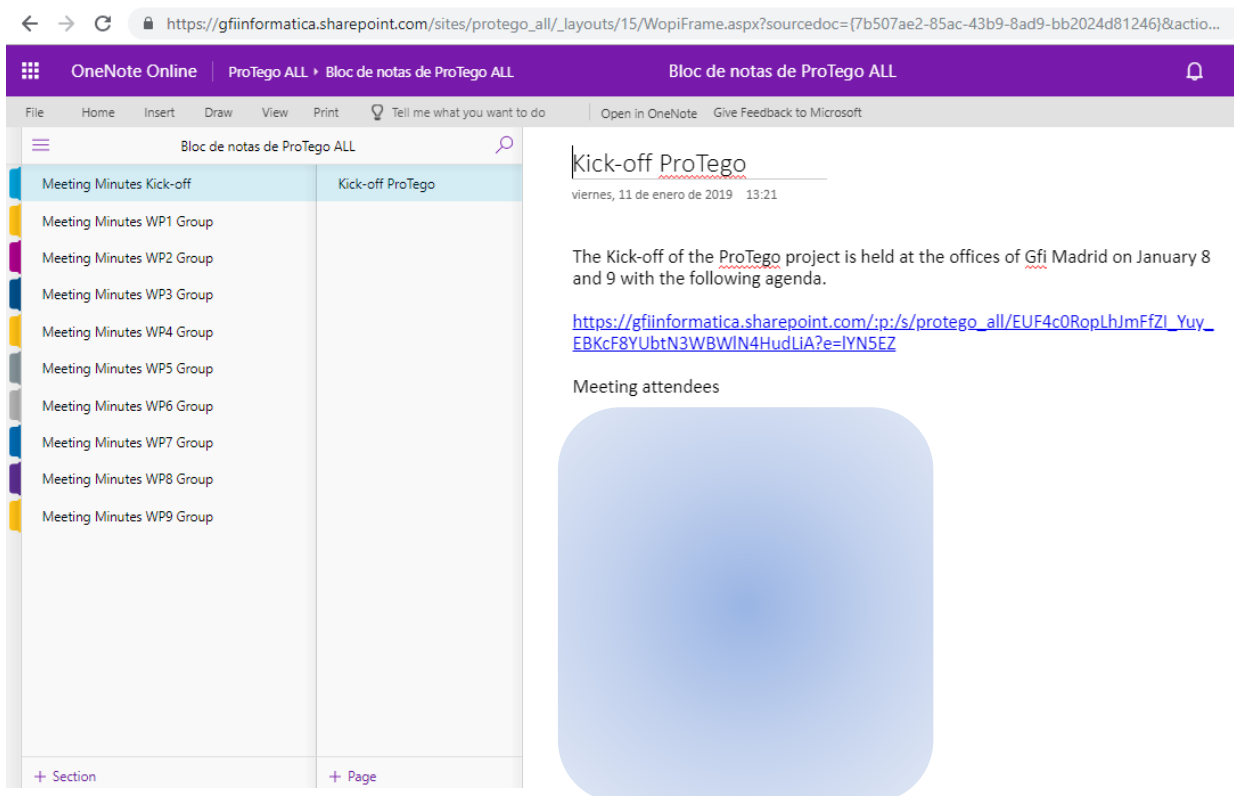


Figure 15. OneNote Online

III.3. News

News area of the collaborative environment of ProTego

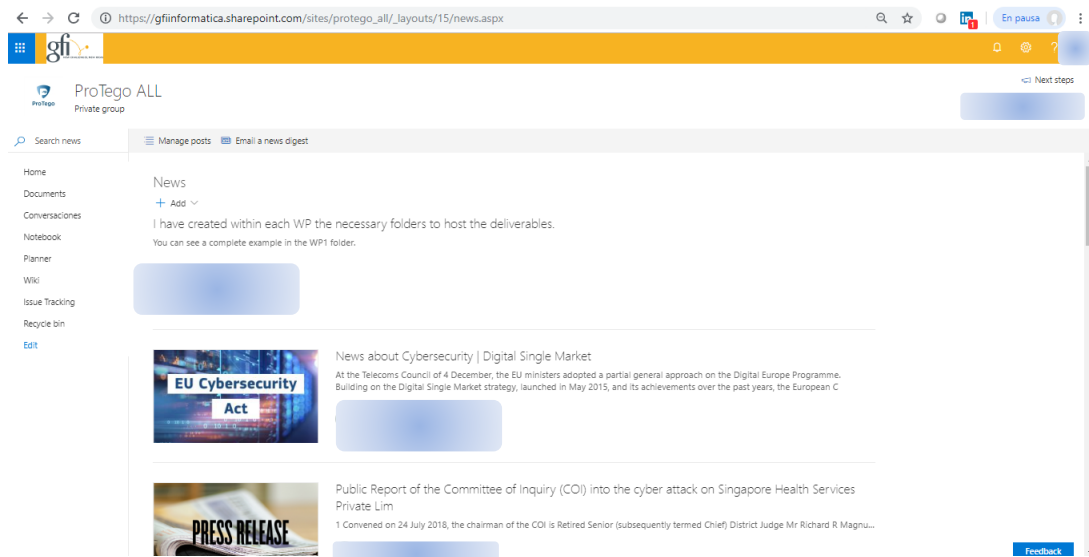


Figure 16. ProTego All News

III.4. Administration Area

This area represents administration part of ProTego Collaborative Working Environment. This area is used by administrator in order to configure and user parameters, set up apps, workflows, issue fields ...

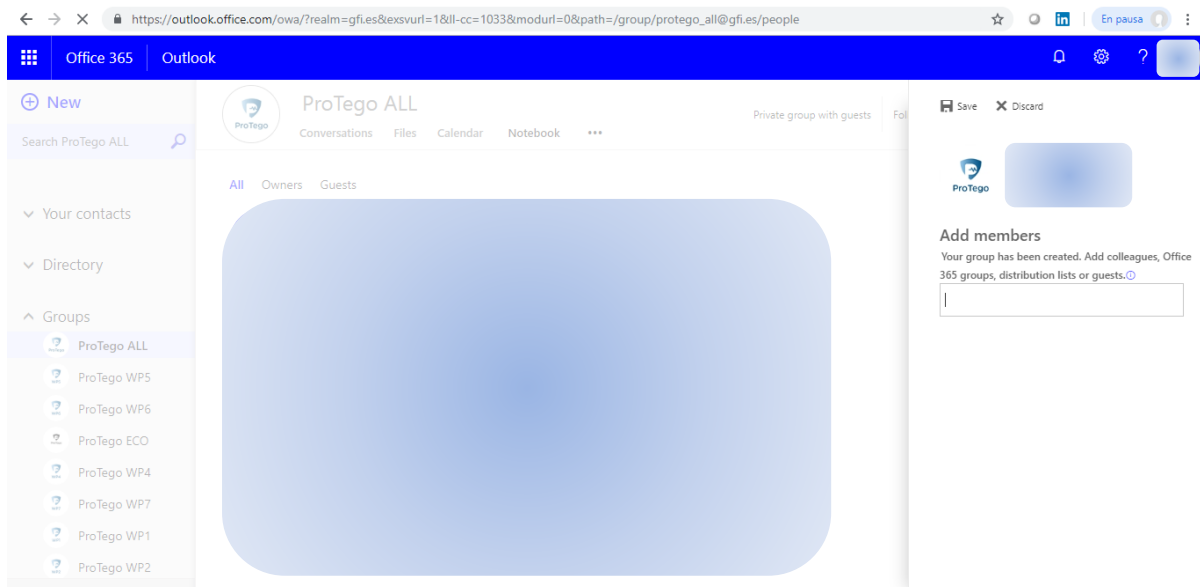


Figure 17. Example of users' management

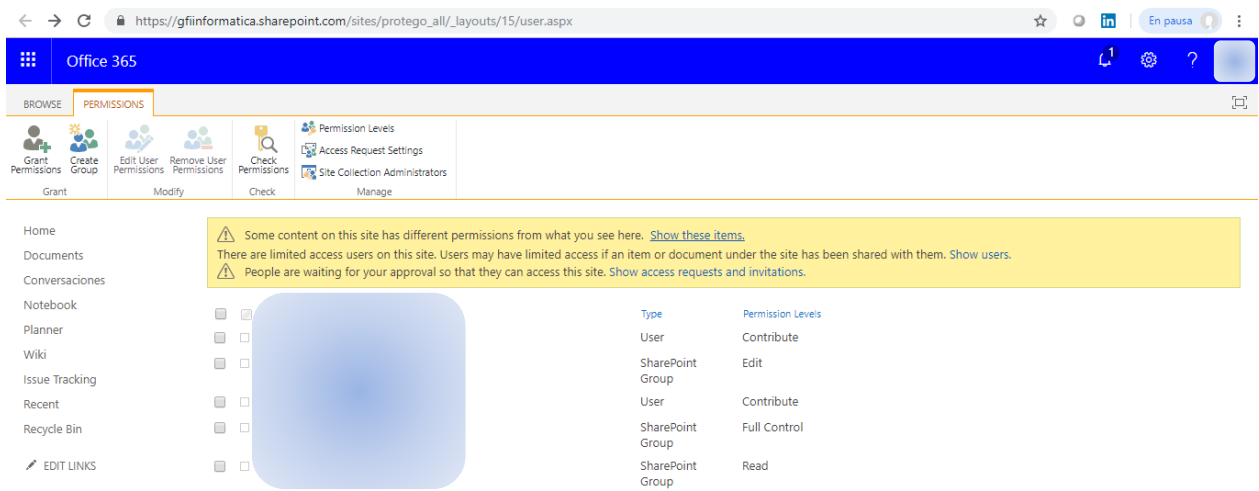


Figure 18. Example of users' permissions

IV. Meeting Organization Procedure

Purpose of this section is to describe meeting organisation procedure.

Procedure is applicable to all meeting organisers and during whole lifetime of the project.

IV.1. Meeting Organisation

IV.1.1. Meeting online platform

Meeting is set up using WebEx platform. Access to the platform can be found on following link: <https://www.webex.com/> [3]

If you need to agree on meeting schedule use Doodle application [4].

Please bear in mind that this is shared meeting account and only one meeting can take place at one time.

IV.1.2. Setting up meeting

When setting up the meeting, meeting organizer should follow these steps:

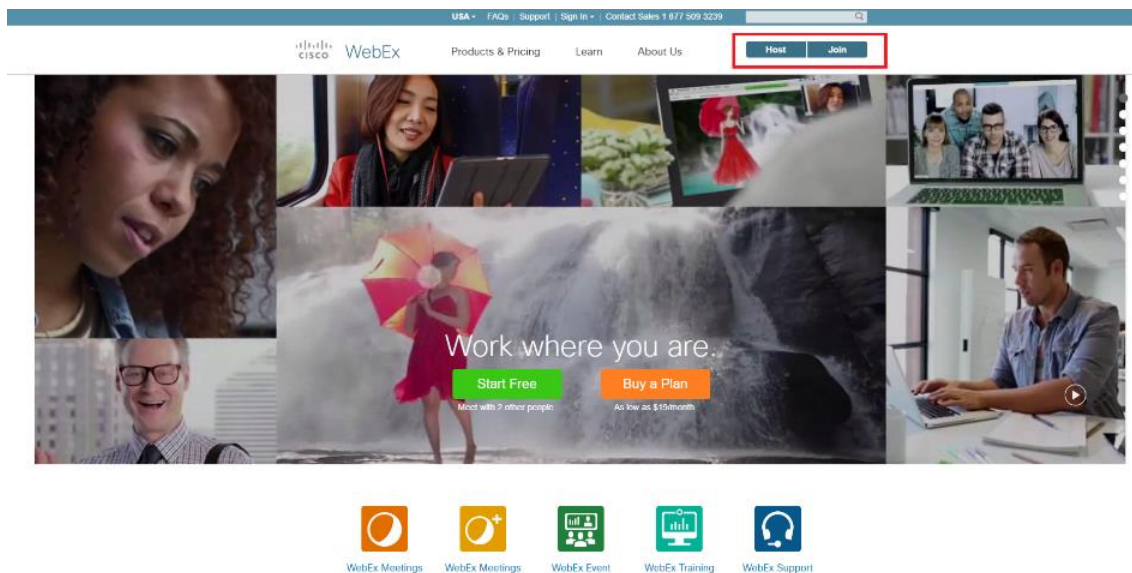


Figure 19. Setting up meeting – step 1

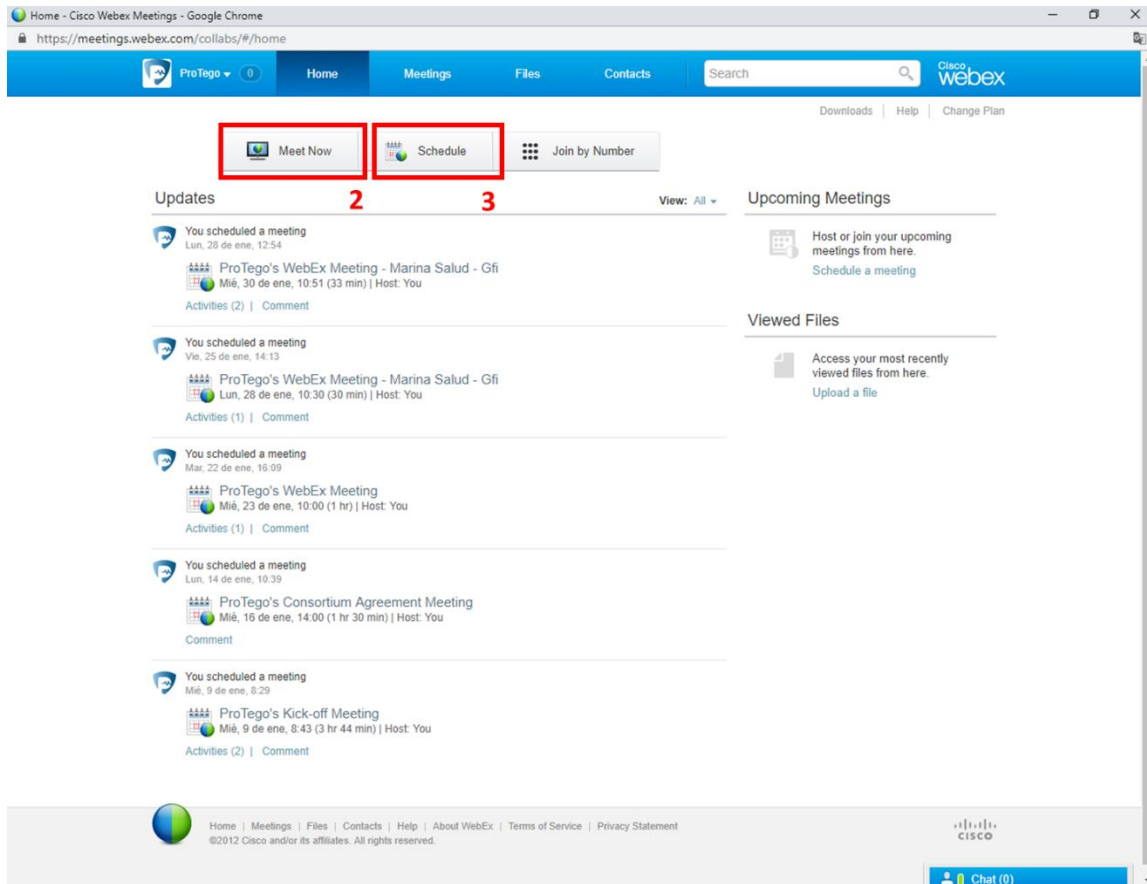


Figure 20. Setting up meeting – step 2

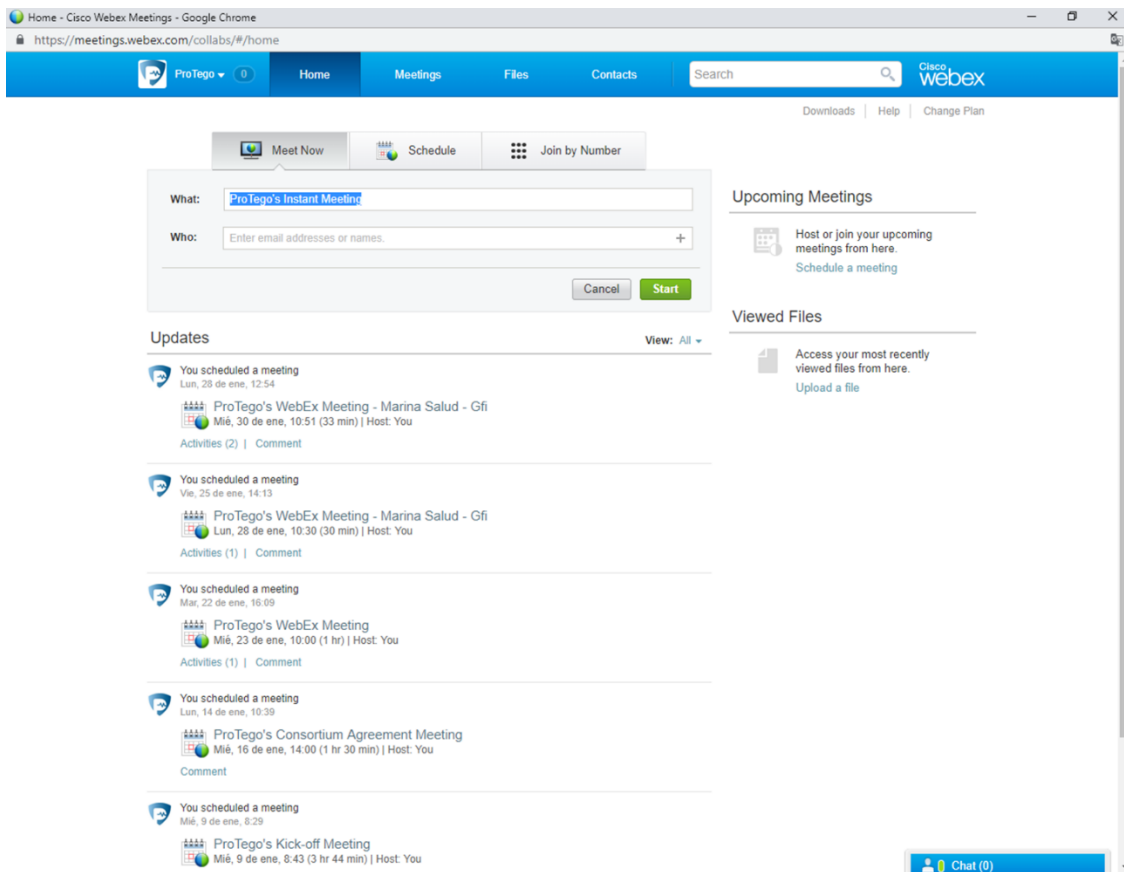


Figure 21. Setting up meeting – step 3

The screenshot shows the 'Schedule a WebEx Meeting' interface. At the top, there's a navigation bar with 'ProTego', 'Home', 'Meetings', 'Files', and 'Contacts'. Below this, the form is titled 'Schedule a WebEx Meeting'. It contains several sections:

- What:** A text input field containing 'ProTego's WebEx Meeting'.
- When:** A date and time selector showing 'Mon, 13/02' and '15:00', and a 'Length' selector set to '1 hr 0 min'.
- Who:** A text input field with the placeholder 'Enter email addresses or names'.
- Agenda (optional):** A large text area with a '1200 characters left' indicator.
- Files:** A section with an 'Attach Files' button and the text 'No files attached'.
- Meeting Password (optional):** A section with a plus icon.
- Audio Connection:** A section showing 'WebEx Audio' and a message: 'Need toll-free number & Call Me service? Upgrade your audio'.
- Record this meeting:** A checkbox that is currently unchecked.

 At the bottom right of the form, there are 'Cancel' and 'Schedule It!' buttons. The 'Schedule It!' button is highlighted in green. The footer of the page includes the Cisco logo and copyright information: '©2012 Cisco and/or its affiliates. All rights reserved.'

Figure 22. Setting up meeting – step 4

- **Recurrence**

If needed, meeting organiser can set up recurrence in order to avoid creation of the meeting every single time prior meeting occurs. In case single meeting should be cancelled (e.g. in case of holidays) this meeting can be found in list of meetings in WebEx and after meeting is opened, only single occurrence of this meeting can be cancelled. Information for cancellation is sent to each participant in planned attendees list.

- **Attendees list**

List of attendees is limited. In order to avoid that limitation, we recommend to use mailing lists email address when organising Work Package regular meetings (e.g. protego_wp5@gfi.es)

IV.1.3. Procedure

This chapter describes procedure to be followed when organising meetings.

1. Meeting organizer sends reminder for a meeting at least 24 hours in advance (even if meeting is recurrent!).
2. If organizer suggests that meeting should be recorded, he needs to explain reasoning for this and ask if someone doesn't agree with recording the meeting. If no complaint / non approval is received before meeting, organizer can proceed with recording. This reasoning and note explaining that meeting attendees have right to reject recording prior meeting starts needs to be included in the reminder email.
3. Reminder email will contain following information (minimum):
 - a. Time of the meeting;
 - b. WebEx link to the meeting;

- c. Note if meeting is recorded and reasoning
 - d. Agenda.
- 4. If someone is not able to join the meeting (and presence is required – e.g. PMB/WP1), their obligation is to:
 - a. Send replacement (inform meeting organizer -> the one who sends reminder + PM);
 - b. If replacement is not available, send formal email to organizer to PM why this is not possible.
- 5. After meeting minutes are prepared, organizer should upload minutes + presentation + recording in appropriate folder in SharePoint.
- 6. After materials are uploaded, organizer informs corresponding WP group that information is available in SharePoint with information where is it located.
- 7. If some action items were appointed to consortium partner whose members were not present during the meeting, organizer has duty to inform missing partner responsible (see participant register, column “Accountable for beneficiary (PM related tasks)”) about tasks, deadlines and to ask for written confirmation from recipient (missing partner) that this information is well received and understood. This information is to be dispatched not later than 1 working day after meeting is finished.
- 8. When important meetings are organized or tasks are planned, please take in consideration bank holidays and personal holidays. This information should be communicated during meetings and setting deadlines and planning activities.

V. REFERENCES AND INTERNET LINKS

- [1] <https://products.office.com/es-es/sharepoint/collaboration>
- [2] https://gfiiinformatica.sharepoint.com/sites/protego_all
- [3] <https://www.webex.es/>
- [4] <http://doodle.com/>



ProTego