CyberKit4SME

Democratizing a Cyber Security Toolkit for SMEs and MEs

Project Nº  883188

CyberKit4SME

D1.1 Collaborative Working Environment and its maintenance

Responsible: GFI INFORMATIQUE
Contributors: GRUPO CORPORATIVO GFI INFORMATICA
Document Reference: D1.1 – Collaborative Working Environment and its maintenance
Dissemination Level: Public
Version: 1.0
Date: 28/07/2020
Executive summary

This document describes CyberKit4SME 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 CyberKit4SME Collaborative Working Environment is built on SharePoint platform (https://products.office.com/fr-fr/sharepoint/collaboration) which is a Microsoft product that allows to create websites, in which information can be stored, organized and shared safely.

The CyberKit4SME Collaborative Working Environment is located at the following address: https://gfi1.sharepoint.com/sites/CyberKit4SME

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.
# Contributors Table

<table>
<thead>
<tr>
<th>DOCUMENT SECTION</th>
<th>AUTHOR(S)</th>
<th>REVIEWER(S)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL</td>
<td>Clément Lascols</td>
<td>Aurélien Lecamus</td>
</tr>
<tr>
<td></td>
<td>Nuria Sánchez</td>
<td>Nuria Sánchez</td>
</tr>
</tbody>
</table>
# Table of Contents

I. COLLABORATIVE WORKING ENVIRONMENT ......................................................... 7  
I.1. Overview ............................................................................................................. 7  
I.2. Location .............................................................................................................. 7  
I.3. Organization ....................................................................................................... 7  
I.4. Collaborative tools ............................................................................................ 8  

II. COLLABORATIVE WORKING ENVIRONMENT ADMINISTRATION ..................... 10  
II.1. User Management ............................................................................................ 10  
II.1.1. (Optional) Create Microsoft account ............................................................... 10  
II.1.2. Register .......................................................................................................... 10  
II.1.3. Email Notifications ......................................................................................... 11  
II.1.4. User Roles ..................................................................................................... 11  
II.2. Project Settings ................................................................................................. 12  
II.3. Issue tracking workflow ..................................................................................... 12  
II.4. Backups ............................................................................................................ 14  
II.5. Security ............................................................................................................ 14  
II.6. Improvements .................................................................................................. 15  
II.7. User role authorisation procedure ................................................................. 15  

III. COLLABORATIVE PLATFORM GUI EXAMPLES ................................................. 18  
III.1. Internal Project Area ......................................................................................... 18  
III.2. Consortium Meeting Minutes ......................................................................... 19  
III.3. News ............................................................................................................... 19  
III.4. Administration Area ......................................................................................... 20  

IV. MEETING ORGANIZATION PROCEDURE ....................................................... 21  
IV.1. Meeting Organisation ....................................................................................... 21  
IV.1.1. Meeting online platform .............................................................................. 21  
IV.1.2. Setting up meeting ....................................................................................... 21  
IV.1.3. Procedure .................................................................................................... 23  

V. REFERENCES AND INTERNET LINKS ................................................................. 25
Table of Figures

Figure 1. Permission to access ................................................................................................... 10
Figure 2. Access request ........................................................................................................... 11
Figure 3. General options ......................................................................................................... 11
Figure 4. Permission level ........................................................................................................ 12
Figure 5. Issues tracking workflow .......................................................................................... 13
Figure 6. Issue alert I ............................................................................................................... 14
Figure 7. Issue alert II ............................................................................................................... 14
Figure 8. SharePoint APPs ....................................................................................................... 15
Figure 9. Add a new member on the CyberKit4SME platform. ................................................ 16
Figure 10. Request Access CyberKit4SME platform ................................................................. 16
Figure 11. Pending request ..................................................................................................... 17
Figure 12. Main page and access to work packages. ................................................................. 18
Figure 13. Project example, document content ...................................................................... 18
Figure 14. Project example, planner ....................................................................................... 19
Figure 15. OneNote Online ..................................................................................................... 19
Figure 16. CyberKit4SME News .............................................................................................. 19
Figure 17. Example of users' management ............................................................................ 20
Figure 18. Example of users' permissions .............................................................................. 20
Figure 19. Setting up meeting – step 1 .................................................................................. 21
Figure 20. Setting up meeting – step 2 .................................................................................. 22
Figure 21. Setting up meeting – step 3 (“rejoindre maintenant”) ............................................ 22
Figure 22. Setting up meeting – step 4 (“Plan a meeting”) ..................................................... 23

List of Tables

Table 1. Platform tools .............................................................................................................. 9
Table 2. Issues status description ............................................................................................. 13
## Table of Acronyms and Definitions

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>EC</td>
<td>European Commission</td>
</tr>
<tr>
<td>WP</td>
<td>Work Package</td>
</tr>
<tr>
<td>Apps</td>
<td>Applications</td>
</tr>
<tr>
<td>PMB</td>
<td>Project Manager Board</td>
</tr>
<tr>
<td>PM</td>
<td>Project Manager</td>
</tr>
</tbody>
</table>
I. COLLABORATIVE WORKING ENVIRONMENT

I.1. Overview

The CyberKit4SME 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 CyberKit4SME Collaborative Working Environment is built on SharePoint platform, which is a Microsoft product that allows to create websites, in which information can be stored, organized and shared safely.

Please note that a Microsoft account is needed in order to use the SharePoint. It can be created with an existing email address.

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
- Social Network Feeds & Conversations
- News
- Project documentation (document management system)
- Forums
- Wiki
- Time tracking
- Notepad

I.2. Location

The CyberKit4SME Collaborative Working Environment is located at the following address:

https://gfi1.sharepoint.com/sites/CyberKit4SME

I.3. Organization

The CyberKit4SME Collaborative Working Environment is organized in a main site, which contains a structure of common folders so that all members have access to the entire project.

The 2 main folders:

- General folder: this folder will be used to store and share project framework documents such as “Grant Agreement” or “Consortium Agreement” and general (non-technical) documents such as templates.
Work Package folder: this folder will be used to store and share documents related to the project Work Packages. Each WP has its own folder. In each WP folder, there will be a sub-folder per task and a common one to be shared by all the tasks to have direct access to project Deliverables. The structure of the Work Package folder will be in line with the work breakdown structure of the project as presented in Part A.

- WP1 – Project Management
- WP2 – Toolkit Requirements, Architecture and Integration
- WP3 – Validation Case Studies and Trials
- WP4 – Risk assessment and management tools
- WP5 – Security Tools
- WP6 – Dissemination and Impact
- WP7 – Ethics requirements

Users can download easily one or several documents from the online server. It also allows to upload one or several documents, and to send an email to document recipients to inform them that a new document is available on the server.

It also has a series of distribution lists with each of the participants of each Work Package, one for general issues and one additional for legal related ones:

- cyberkit4sme_all@gfi.world: All members from the other mailing lists
- cyberkit4sme_legal@gfi.world: To be used for contractual and financial topics. Normally this list is only to communicate with CEOs, CFOs, legal representatives and people from legal/financial departments. For example a person from the administration dept should be aware of an amendment or a cost reporting period but does not need to know about the next meeting agenda
- cyberkit4sme_wp1@gfi.world: To be used for WP1 related topics
- cyberkit4sme_wp2@gfi.world: To be used for WP2 related topics
- cyberkit4sme_wp3@gfi.world: To be used for WP3 related topics
- cyberkit4sme_wp4@gfi.world: To be used for WP4 related topics
- cyberkit4sme_wp5@gfi.world: To be used for WP5 related topics
- cyberkit4sme_wp6@gfi.world: To be used for WP6 related topics
- cyberkit4sme_dev@gfi.world: To be only used by developers among the different WPs

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 CyberKit4SME 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

<table>
<thead>
<tr>
<th>Tool</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overview</strong></td>
<td>Project information aggregator, retrieving information from all project related tools.</td>
</tr>
<tr>
<td><strong>Time Tracking</strong></td>
<td>Management and reporting of the consumed effort by resource and task.</td>
</tr>
<tr>
<td><strong>Activity</strong></td>
<td>Projects users’ activity configurable log to provide visibility on content changes.</td>
</tr>
</tbody>
</table>
| **Calendar** | • Project tasks calendar view;  
• Deliverables and milestones calendar view;  
• Issues calendar view. |
| **Issue Tracking** | • Software Change management (bugs & features).  
• General issues tracking. |
| **News** | • Publish relevant news to disseminate project relevant information. |
| **Wiki** | • Knowledge database.  
• Collaborative creation of content. |
| **Conversations** | • Emails. |
| **Planner** | • Task scheduling.  
• Task management.  
• Assignment of tasks. |
| **Notepad** | • Meetings minutes.  
• Other meeting notes. |
| **Docs** | • Documentation repository. |
II. COLLABORATIVE WORKING ENVIRONMENT ADMINISTRATION

Please note that the screenshots provided below from SharePoint are in French because SharePoint adapts the language to the users. The SharePoint site will be displayed in the respective languages of the partners in the Consortium.

II.1. User Management

II.1.1. (Optional) Create Microsoft account

If your email address is not already linked with a registered Microsoft account, you can link it quickly and free of charge:

- Go to [account.microsoft.com](http://account.microsoft.com),
- Select Create a Microsoft Account
- Enter your existing email address
- Create a password (and save it)
- Select your country and date of birth
- Input the verification code sent to your existing email address

II.1.2. Register

In order to start using CyberKit4SME Collaborative Working Environment, each user must be invited by an administrator of the SharePoint platform or request an access. A new user has to provide the following information via email to the platform administrator:

- **Email**

After a user sends his mail to the CyberKit4SME Collaborative Working Environment, the administrator follows the authorization procedure described in Section II.7.

If a user tries to enter the platform without being invited, the following window appears.

![Permission to access](image)

**Figure 1. Permission to access**

And his email is sent to the administrator of the platform, which accepts or rejects his access request, according to the procedures described in section II.7.
II.1.3. Email Notifications

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

II.1.4. User Roles

The users are assigned by groups (see Figure 4), meaning that a 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](image)

**II.2. Project Settings**

The project members with the Full Control role, are able to configure the project settings. In the CyberKit4SME Collaborative Working Environment it is possible to configure a wide range of project settings, including:

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

**II.3. Issue tracking workflow**

CyberKit4SME Collaborative Working Environment supports issue tracking features. Each issue has an attribute called status. Issue passes through several status. Workflow of these.
Figure 5. Issues tracking workflow

The list with the definition of each status is displayed in Table 2.

Table 2. Issues status description

<table>
<thead>
<tr>
<th>Status title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Default status for each issue. The issue has been opened but its resolution has not yet started.</td>
</tr>
<tr>
<td>In progress</td>
<td>The resolution of the issue is in progress.</td>
</tr>
<tr>
<td>Impediment</td>
<td>Resolution of the issue is facing impediments and cannot continue until the impediments are resolved.</td>
</tr>
<tr>
<td>Reopened</td>
<td>The issue has been closed but for some reason has been reopened.</td>
</tr>
<tr>
<td>Ready for validation</td>
<td>The resolution of the issue is finished and ready for review and approval.</td>
</tr>
<tr>
<td>In validation</td>
<td>The resolution of the issue is in process of validation.</td>
</tr>
<tr>
<td>Closed</td>
<td>The resolution of the issue is validated, approved and closed.</td>
</tr>
</tbody>
</table>

The platform allows the management and sending of alerts when there is a change in the workflow of the incident, as showed in Figure 6 and 7.
II.4. Backups

Full backup of the server where the CyberKit4SME Collaborative Working Environment runs, is done daily following the Microsoft directives.

II.5. Security

The security policies of the https://gfi1.sharepoint.com/sites/CyberKit4SME are those defined by Microsoft.
II.6. Improvements

CyberKit4SME Collaborative Working Environment is a customizable and flexible platform. It can be customized through the installation and configuration of SharePoint Apps (Figure 8) e.g. Discussion Board, Custom List…

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

![SharePoint APPs](image)

Figure 8. SharePoint APPs

II.7. User role authorisation procedure

Registration within CyberKit4SME Collaborative Working Environment can be done in two ways:

- The platform administrator adds a new member through his email with guest role (Figure 9).
The new user accesses the CyberKit4SME All site and “Request Access” (Figures 10 and 11).

After the access request is done, the administrator needs to verify the roles in CyberKit4SME Collaborative Working Environment for that specific user. For that purpose, the administrator consults the document called “CyberKit4SME Mailing List.xlsx”:

https://gfi1.sharepoint.com/:x:/s/CyberKit4SME/EZGLXg12fG1KpfZeUnVBKUABagFixs3H1HZ8j3Jjh-M2CQ?e=UDD1Sm

“CyberKit4SME Mailing List” is the document which defines general information, groups and roles about all project members. The consortium partner lead person is accountable for defining access rights for members of her/his organization. If the information on a person for a specific access request is not found in the “CyberKit4SME Mailing List”, the administrator will not approve use of application until the information is added in the CyberKit4SME 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 CyberKit4SME 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
III.2. Consortium Meeting Minutes
This is the dedicated area of the platform for sharing notes and meeting minutes

III.3. News
News area of the collaborative environment of CyberKit4SME

Figure 14. Project example, planner

Figure 15. OneNote Online

Figure 16. CyberKit4SME News
III.4. Administration Area

This area represents administration part of CyberKit4SME Collaborative Working Environment. This area is used by administrators in order to configure user parameters, set up apps, workflows, issue fields …

Figure 17. Example of users’ management

Figure 18. Example of users’ permissions
IV. Meeting Organization Procedure

The purpose of this section is to describe the meeting organisation procedure. This procedure is applicable to all meeting organisers and during the entire lifetime of the project.

IV.1. Meeting Organisation

IV.1.1. Meeting online platform

Meetings are set up by the Project Coordinator using Teams platform. Access to the platform can be found via the following link: https://www.microsoft.com/fr-fr/microsoft-365/microsoft-teams/group-chat-software

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

Please bear in mind that this is a single 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:

![Setting up meeting](image)

Figure 19. Setting up meeting – step 1
Figure 20. Setting up meeting – step 2

Figure 21. Setting up meeting – step 3 (“rejoindre maintenant”)
Figure 22. Setting up meeting – step 4 (“Plan a meeting”)

- **Recurrence**

If needed, the meeting organiser can set up recurrence in order to avoid having to create a meeting for every single occurrence of it. In case a single meeting should be cancelled (e.g. in case of holidays), this meeting can be found in the list of meetings in Teams and after the meeting is opened, only the single occurrence of this meeting can be cancelled. The information for cancelation is sent to each participant in the planned attendees list.

- **Attendees list**

The list of attendees is limited. In order to avoid that limitation, we recommend using mailing lists email address when organising the Work Package regular meetings.

**IV.1.3. Procedure**

This chapter describes the procedure to be followed when organising meetings to keep the Collaborative Working Environment duly updated:

1. The meeting organizer sends a reminder for a meeting at least 24 hours in advance (even if the meeting is recurrent!).

2. If the organizer suggests that the meeting should be recorded, she/he needs to explain the reasons for this and ask for consent of the participants. If no complaint / non approval is received before the meeting, the organizer can proceed with recording. The reasons for recording and the note explaining that the meeting attendees have the right to refuse the recording before the meeting starts need to be included in the reminder email.

3. Reminder email shall contain the following information (minimum):
   a. Time of the meeting;
   b. Teams link to the meeting;
   c. Note if meeting is recorded and reasons
   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 the reminder + PM);

b. If replacement is not available, send formal email to organizer to PM why this is not possible.

5. After the meeting minutes are prepared, the organizer should upload the minutes + the presentation + the recording to the appropriate folder in SharePoint.

6. After the materials are uploaded, the organizer informs the corresponding WP group that the information is available on SharePoint and provides the location of the materials.

7. If some action items were appointed to consortium partner whose members were not present during the meeting, organizer has duty to inform the missing partner lead person (see participant register, column “Accountable for beneficiary (PM related tasks)” about the tasks, deadlines and to ask for written confirmation from the recipient (missing partner) that this information is well received and understood. This information is to be dispatched no later than 1 working day after the 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 for setting deadlines and planning activities.
V. REFERENCES AND INTERNET LINKS


