SEVENTH FRAMEWORK PROGRAMME
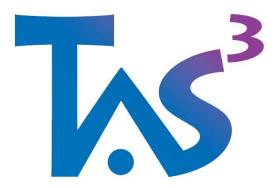**Challenge 1**
Information and Communication Technologies

Trusted Architecture for Securely Shared Services

Document Type:	Deliverable
Title:	**Report on internal training**
Work Package:	WP11
Deliverable Nr:	D11.8
Dissemination:	PU
Preparation Date:	30 November 2010
Version:	1.0

The TAS³ Consortium

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6	CNR/ISTI	IT	CNR	Partner
7	University of Koblenz-Landau	DE	UNIKOL	Partner
8	Vrije Universiteit Brussel	BE	VUB	Partner
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Contributors

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Contents

1 Executive Summary

Training is just one part of WP11 which also encompasses Dissemination and Exploitation, activity for which is reported separately. This deliverable reports on internal training activity for the TAS³ project during the 11-month period from January-November 2010. The document is intended for reviewers and project team members and is an update on the version of this report delivered at PM24. This report is on internal training only; external training is addressed in a separate report, D11.9.

The major aim of this phase of training activity has been to continue to provide harmonised training to the consortium partners which reflects the current state of the project; as in Year 2, key objectives have continued to be ensuring that internal partners develop and explore a common understanding and application of the concepts and methods used, sharing of knowledge and results arising from the work and training of technical staff in concepts and technologies to be used for building and successfully integrating software components to be used in the demonstrators.

Training activity has continued largely via continuation of the highly successful series of face-to-face meetings begun in the second half of Year 2. Partners have also been encouraged to make use of the customisable online training environment established in Year 2.

The majority of planned training events, including a series of developer integration workshops, were successfully completed although some were delivered through more informal routes than originally anticipated. In addition a range of short, ad hoc training type activities were also carried out, including support for project administration tasks.

In addition communication regarding training requirements, activities and outcomes has been linked to regular project activities and communications (in particular the TRAC project portal which also acts as a repository for key project documents). Partners have been encouraged to continue to track and document informal training and exchange of ideas using the RFC (Request For Comment) facility.

Future training will continue to focus on topics such as legal issues, trust and trust perception and supporting delivery of pilots, with an ever-increasing emphasis on usability. For the final phase of the project, the experience of piloting will inform parallel materials and documentation on set up and integration of TAS³ modules with live systems which will be developed and tested, and further training will be derived to support implementation of the project business plan.

2 Introduction

The overall objective of training activities is for all parties involved to reach informed consent on all three levels of the project's success:

- Technical partner expertise
- Pilot partner insight and awareness
- End-user take-up

This activity will be considered successful if all partners have a unified view of the aims and objectives of TAS³ and its expected outcomes and that certain parties achieve a deeper understanding of the TAS³ philosophy, architecture, modules, workflow and integration issues involved.

Training in TAS³ is part of the Integration, Exploitation and Training workpackage (WP11). Specific objectives in the project Description of Work are:

- To organise training sessions for technical partners at the beginning of the project and then iteratively as the need arises and is identified, to accommodate feedback from and support needed for each pilot phase
- Training materials will be re-used as the basis for training for external and associated partners and the wider TAS³ community.

The key tasks are:

- T11.10 Develop training material and presentations in collaboration with subject matter experts from within the project team. Project staff will be encouraged to develop skills to develop their own training materials for reuse within the project LMS environment
- T11.11 Video recording of internal face-to-face training sessions
- T11.12 Use an LMS platform (i.e. online training environment) for storing and re-using learning objects and delivering training via multiple channels.
- T11.13 Organise face-to-face training sessions and workshops at key points in the project, including before pilot phases.

A key objective of training activity in this year has been to continue to support the development of common understanding and application of the concepts, methods and technologies used in the project and sharing of knowledge and results between parties from a variety of backgrounds.

'Training' is directed towards very specific audiences, which differentiates it from dissemination; however we appreciate that some dissemination activity carried out for the project crosses this boundary and can be seen as fulfilling both objectives.

3 Audience and topics

The focus of this report is internal training for project partners: external training with those outside the project is the subject of a separate report, D11.9.

This year the main focus has been on demand and just in time formal training via continuation of the successful series of developer workshops begun at the end of Year 2. By gathering all staff involved in technical development in one place for two or three days it has been possible both to advance actual coding and integration of components, and for individuals to share expertise and raise questions with a minimum of delay. For new development staff joining the project this environment has offered the opportunity for mentoring by more experienced developers; at the same time for these more experienced team members the processes of explaining project concepts and techniques has helped to consolidate their own understanding and uncover areas where knowledge is less secure in a safe and secure environment.

This iterative collaborative and informal approach to training is, we believe, unusual in a project of this kind, but we maintain that it has been highly successful, demonstrated by the increasing number of partners whose initial doubts about the potential of the approach has been overcome so that they are now not only willing to send team members to participate but also take an active part in agenda setting and arrangement of meetings.

The emphasis so far has been on equipping technical development staff with skills to work on building and integrating components within the proposed architecture. Training in the first part of the year has focused primarily on support for those involved in the delivery of the initial integrated demonstrators for the March Review meeting. Following the successful Review, this progressed into support for planning and delivering the next set of demonstrators to be shown at the next review in 2011. This has involved an increasing circle of technical staff as technical work has begun on the Dutch employability pilot, not included in the first integration trials. Technical staff at Kenteq have needed to be trained in the project approach to SSO and use of project tools, in particular ZXID and the SOA Gateway.

The activity is planned to deliver training events with similar frequency as project components become available.

The approach to training will continue to be that it should be led by a group of technical partners who have a sufficient joint vision to author, collaborate and conduct it, and that this activity will be supported, co-ordinated and reported on by WP11, who will also be responsible for evaluation and analysis of results.

Partners will continue to be encouraged to develop reusable materials which can be deposited in the online training environment. Materials developed initially for the March project review have further usefulness, and the resulting videos have been preserved online (see Appendix 2) for reuse. We will continue to pursue a blended approach, including development of a series of short training videos aiming to:

- Introduce the TAS³ vision, services and components
- Give an understanding of the legal background and framework
- Offer practical training in setting up and use of the TAS⁸ environment

We will measure the efficiency and outcome of training based on a defined evaluation strategy, using surveys and progress testing. Key performance factor dimensions will be:

- Adherence to TAS³ philosophy
- Adherence to business rules
- References and resources
- Tools and test regimes
- Performance factor monitoring

We see key next steps as:

- Continued encouragement of all partners to interact self-sufficiently with the online training environment and consider further ways in which it might be utilised and exploited
- Increased engagement and activity of informal training underpinned by enhanced communications and reporting
- Further analysis of the training curriculum for technical partners leading to a detailed topic list with associated responsibilities and will enable more detailed training plans with appropriate evaluation to be defined and shared with a wider audience in preparation for external training activities in Year 4.

4 Activities summary

4.1 Activities

Event or Activity + brief description	Target Audience	Provided by	Date	Expected Outcomes
Developer workshop, London	Developers working on UK employability integration trial	Peer training by project team	18 Jan 2010	ZXID SSO SOA Gateway Passing Trust Metrics around Use of trust & privacy negotiation
Developer Workshop, Koblenz	Developers working on integration trials	Peer training by project team	15-19 Feb 2010	Finalising for demo: learning about integration and setup Video training materials produced on UK Employability and Healthcare integration trials (see Appendix 2)
Developer Workshop and review prep, STARLab	Developers working on integration trials	Peer training by project team	1-3 March 2010	Finalising for demo: learning about integration and setup
Workshops, Sophia Antipolis	Whole project team	Peer training by project team members	26 April 2010	Training in PrimeLife XAML extension/privacy policy Ontology use Usability New project architecture Integration testing

Basic UML training	Kenteq	Eduvision, Utrecht	7 May 2010	
Developer workshop, Karlsruhe	WP09 employability partners	University of Karlsruhe	20-21 May 2010	Security business process modelling and employability demonstrators PDS Usability
Workshops, Kent	Whole project team	Peer training by project team members	7 June 2010	New storyboards Business process technology Delegation
Developer workshop, Dublin	Technical developers from all WPs	Peer training by project team members	28 June 2010	PDS Discovery Service Policy editing and models Architecture Delegation Workflow management Trust policies ZXID for Windows
Training in UML driven testing	WP09 partners	CNR		Use of Rational Rose and CNR tools for testing
Developer workshop, Gent	Technical developers from all WPs, WP09 partners	Peer training by project team members	22 Sept 2010	Ontologies IDP Lex vdM up to speed
Developer workshop, Koblenz	Technical developers from all WPs, WP09 partners	Peer training by project team members	11-15 Oct 2010	Introduction to strategies for usability Integration testing Policy

				setting/editing/viewing
Persona writing workshop, London	WP09 partners	City University, London	2 Nov 2010	
Workshop, Sophia Antipolis		PrimeLife project	10 November 2010	Session from PrimeLife project explaining their approach to policy setting and enforcement
Workshop, Sophia Antipolis		City University, London	11 November 2010	Training session in interface usability for Dashboard architects

4.2 Project online training environment

We have continued to maintain the project Moodle online training environment during this year, and partners are constantly encouraged to update and augment resources stored there. As any formal training takes place and as partners find resources that could be useful in teaching others about concepts or techniques relevant to the project, these are added as new resources, following the taxonomy outlined in the first iteration of this report at the end of Year 2.

4.3 Next steps

As new staff members can be expected to join partner teams and become involved in the work, the need to educate them about the project, its background and essential concepts will continue. Partners will continue to be encouraged to use the online training environment to facilitate this, but we see the success of the informal training opportunities offered by our regular developer workshops as one of the great strengths of the project work and therefore aim to continue these into the final year of the project.

However we anticipate that the main thrust of internal training needs in the final year will be to support pilot partners. The distinction between internal and external training will therefore become more blurred and resources originally aimed at internal project members will need to be adapted for use by those not closely involved in the project.

A major task for Year 4 will be the production of a TAS³ training manual, which will be tested on internal staff, on pilot partners and finally released as part of the final outputs of the project.

5 Appendices

Appendix 1: List of partner contacts with responsibility for training in Year 3

(These people have been set up with administration rights in the online training environment. This list represents responsibility during Year 3 of the project and will change in Year 4 as a result of staff changes)

Partner	Person
Kenteq	Dries Pruis
University of Nottingham	Sandra Winfield
KUL	Seda Guerses
SAP	Gilles Montagnon
University of Kent	Stijn Lievens
Custodix	Louis Schilders
Synergetics	Luk Vervenne
University of Zaragoza	Carlos Flavian
University of Karlsruhe	Jutta Mülle
VUB Starlab	Quentin Reul
EIfEL	Marc van Coillie
CNR	Eda Marchetti
Oracle	Joe Alhadeff
Risaris	John Power
TU/e	Jerry den Hartog
University of Koblenz-Landau	Marc Santos
Symlabs	Sampo Kellömaki

6 Video presentation on use of ZXID

http://tasssservices.uni-koblenz.de:8080/tas3/videos/main.html

This set of videos initially prepared for the March Review include training materials on ZXID login, use of the Audit Bus, the Discovery Service, the Trust PDP, the Matching Service, the early version of the Dashboard, the Business Process, the SOA Gateway and the OCT. All these are presented in the context of the first UK Employability Integration Trial, and have proved useful familiarisation and training materials for new project staff.

7 Amendment History

Ver	Date	Author	Description/Comments
0.1	26.10.10	SEW	First outline draft
0.2	15.11.10	SEW	Revised draft
1.0	31.11.10	SEW	Revised to incorporate comments from internal review