Trusted Architecture for Securely Shared Services

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1 Executive Summary

This deliverable reports on external 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 covers training activities involving those who are not consortium project partners: internal training by and for partners is the subject of a separate report, D11.8.

There is a significant overlap between this area of activity and dissemination, which is also part of WP11, reported in deliverables D11.3 and D11.4.

We have been able to carry out some external training during the year; this has mostly been informal, although it has included some more formal events by project partners. The way the project has developed has meant that it has not yet been appropriate to carry out the training on system use with piloting partners originally expected for this year; this will now be done in Year 4, when materials for piloting will be more fully developed. There has, however, been a significant amount of dissemination which has included elements of training during the year.

Training will become a more prominent activity in the next year. We anticipate that the project online training environment will become more heavily used in the final year of the project when materials will be released to pilot partners and the wider community. This will involve inclusion of materials in languages other than English to support those taking part in piloting activity. We also expect to conduct more formal workshops for external audiences at a variety of technical levels.

Future training will focus on topics such as legal issues, trust and trust perception, users and usability and supporting delivery of pilots. Pilot training design will need to encompass further training needs analysis to meet the specific needs of particular pilot participants, as well as evaluation of end user perceptions. In anticipation of the final phase of the project, parallel materials on set up and integration of TAS³ modules with live systems will be developed and tested, and further set up training will be derived to support implementation of the project business plan. There will also be a TAS³ training manual and a short series of eLectures modelled on the successful format used by the Prolix project.

2 Introduction

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.

'Training' is directed towards very specific audiences, which differentiates it from dissemination; however we appreciate that a proportion of dissemination activity (in particular conference workshops) carried out for the project crosses this boundary and can be seen as fulfilling both objectives. This is especially true at the current stage of the project, where raising awareness of project work and achievements is an essential precursor for more specific training activity, especially when working with external partners.

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

For external parties, this activity will be considered successful if those taking part have a coherent view of the aims and objectives of TAS³ and its expected outcomes, and, in some cases, have achieved an understanding of the TAS³ philosophy, architecture, modules, workflow and integration issues.

Training activities involving external partners is concerned with the second two of these levels: the first is more the focus of internal training, covered in D11.8.

3 Activities

The original timelines set during initial planning for the project envisaged that during this year we would conduct significant amounts of training for external pilot partners in use of TAS³ technology. In carrying out the actual work for the project, however, it has become clear that in this year it has not been appropriate to conduct training for externals in individual module use as these have either not been stable or not yet reached their final versions, nor has integration work yet reached a stage where it has been feasible to train outsiders in use of the integrated test system. The main focus of project demonstrator work during the first part of the year has been the production of a set of lab-based 'integration trials' for the March Review, proving the architecture and integrating a suite of TAS³ modules developed by different partners. These drew upon domain knowledge and experience of the WP09 team, much of which was gained through consultation with potential pilot organisations: however these integration trials were largely experimental in nature and did not involve external partners directly in hands-on use of the system.

However, following the success of these first integration trials, the second set of demonstrators planned for the Year 3 Review is now being developed to include a mixture of both further integration trials and initial piloting involving external partners, this latter activity being exemplified by the Dutch employability demonstrator. This use case involves the Tripod consortium in the Netherlands, consisting of three separate national organisations: Kenteq (offering employability services and training), UWV (vacancy and ePortfolio provider) and SVH (an ePortfolio provider). Initial informal training activities have therefore taken place with all three organisations. These have focused on awareness raising, developing an understanding of the reasons for using TAS³, the benefits and what it involves; training in the process of creating use cases to inform pilot activity; and continuing training to support preparation for technical implementation. Most of this training has been conducted face-to-face, via a mixture of formal meetings and individual one-to-one support for both managers and technical staff.

In addition, the UK employability demonstrator has conducted informal training with World of Skills (UK student placement provider organisation) staff as preparation for piloting in Year 4. As with the Tripod consortium, this has consisted largely of awareness raising, including assistance in analysis of current systems and working methods. WP09 team members have conducted informal ad hoc training to support student interns working on customising business and IT systems currently in use. This will serve as groundwork preparation for incorporation of TAS³ technology in more structured piloting activity planned for 2011.

As mentioned above, for WP11 activity beyond demonstrator partners, it has been more appropriate for the emphasis to be more on dissemination than training as such. However there has been some external training activity in specialist areas carried out in the context of other work. Project staff from KU Leuven participated in the CTIT Workshop on Privacy in Online Social Networks in September 2010 at the University of Twente in the Netherlands[1], delivering a workshop on privacy

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[1] http://es.ewi.utwente.nl/posn/

requirements engineering. Dr Seda Gürses from the project co-organised an interdisciplinary course on privacy at KU Leuven in Belgium in June 2010, including a workshop on privacy and requirements engineering[2].

Also in the area of privacy, Professor David Chadwick from the University of Kent gave a workshop for the Smart University, Malaga, in October/November 2010, in which TAS³ ideas and solutions were presented[3].

Further to these, WP11 has created an awareness-raising video for general audiences that can be used as introductory material for training sessions[4]. This was launched on the project's exhibition stand at the ICT 2010 conference in September 2010. While this was primarily a dissemination activity, it also offered an opportunity for informal training via static displays (videos and slideshows) and face-to-face interactions with visitors to the stand involving hands-on demonstrations and explanation of how the project architecture supported these. All the demonstration materials used at this event are now housed in the project Moodle site[5] to facilitate future re-use.

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[2] http://es.ewi.utwente.nl/posn/guerses.pdf

[3] http://www.smart-university.eu/program-id-management-state-of-the-art.htm

[4] http://www.youtube.com/watch?v=elYB5pVYIVk

[5] http://training.tas3.eu

4 Next steps

As the vision and understanding of the project's architecture and technologies mature further in the final year of the project, we expect that it will become both possible and more appropriate to conduct more specific external training activities, broadening the audience first (and essentially) to a further set of external partners involved in piloting activities, associated partners and then to the wider community, when it will incorporate familiarisation with the content of the business plan. This will be supported in the final phase of the project by the development and testing of a TAS³ manual, to accompany the business plan and the exploitation plan.

Overall, the approach to training will continue to be that it should be led by a group of technical partners who have a sufficient joint understanding 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. As the bank of learning objects and training materials in the online training environment continues to develop, it will be shared and tested more widely, first with associate partners, then eventually via a public interface to a more general, though by nature still relatively specialised, audience.

We consider that it is most appropriate to do this via a blended approach, including development of at least one (reusable) workshop and set of associated materials (including online materials) aimed at a more general audience, to:

- Highlight the importance of securing personal data in a shared services environment
- Outline the potential business benefits of secure data reuse
- Introduce the TAS³ vision, services and components
- How a circle of trust works
- Give an understanding of the legal background and framework
- Explain use of policies to control use of personal data
- Outline (in general terms) what is needed to set up and use the TAS⁸ environment.

In preparation for this, this year we have developed a short awareness-raising video[6] as a starting point for discussion and to demonstrate the need for TAS³ services. This is the first in a planned series: next year this will be followed by a second, modular video consisting of a series of short 'eLectures' and interviews with key authorities from the project team explaining the specialist concepts and tools they have developed. The internal materials developed by the project for the March project review, which are available online (http://tasssservices.uni-koblenz.de:8080/tas3/videos/main.html) but currently intended for internal use only, will be used as a starting point for these.

These will in turn act as introductions to use of sets of more specialist materials on the final set-up, usage, installation and configuration of TAS³ networks in different domains, including setting up the legal framework needed, the registration and

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[6] http://www.youtube.com/watch?v=elYB5pVYIVk

intake processes, setting up and using an IDP and the underlying business model and business processes needed. This will be aimed primarily at groups of individuals or communities that express interest in adopting or adapting all or part of the TAS³ infrastructure and components.

This training will continue to be delivered largely through workshops and web-based materials, which are expected to cover

- Why a TAS³ network is needed
- What issues it can (and cannot) resolve
- Practical introduction to installation and use of TAS³ components
- Policies, policy setting and policy management
- Workshops to explore deeper benefits from TAS³, tailored to a particular group or community's interests.

We are in early stages of discussing a TAS³ Summer School to be held in 2011, along the lines of the successful events held by the PrimeLife project; this will be reported on in the next iteration of this report.

5 Amendment History

Ver	Date	Author	Description/Comments
0.1	26.10.10	SEW	First outline draft
0.2	21.11.10	SEW	Revised draft for internal review
1.0	08.12.10	SEW	Revised following reviewer comments