



PA Introduction & education

PA process overview document

PA recruitment

Process area:

- Introducing new PA's to the life as an OpenPEPPOL PA. including:
 - Collaboration model, roles and responsibilities for an OpenPEPPOL PA
 - PA related process methods and tools

SUB processes

- Introduction, Education & kickoff webinars
- Local OpenPEPPOL seminar

Main Goal is to

- Enable the new PA to operate accordingly to the OpenPEPPOL governance processes.

Trigger

- Approval of a Consortia agreement
- Signing of a PA membership form
- Readiness of PA organization

Outcome:

- New PEPPOL Authority established

Documentation and reporting

- PA handbook
- PA introduction & education plan

PA Recruitment process

Collaboration model

OpenPEPPOL Managing Committee

Recruitment Coordinator

Local OpenPEPPOL seminar

Introduction and education

New PA Staff and management

OpenPEPPOL
stakeholders

Engagement and onboarding LEAD

Existing PA representatives (PA forum)

Operating Office

Roles and responsibilities

MC (Strategic owner of the process)

- Approval of PA & signing of Authority agreement

Recruitment coordinator (p.t DSG)

- Responsible for overall planning and coordination
- Responsible for planning and execution of Local OpenPEPPOL seminar

Engagement and onboarding Lead (P.t. TICC LEADER) – (Operational leader of engagement and onboarding)

- Owner of the process **Existing PA representatives** (Subject Matter Experts on PA activities from current PA members)
- Active participation in development of education material
- Active in PA introduction and education
- Knowledge sharing and support (on demand)

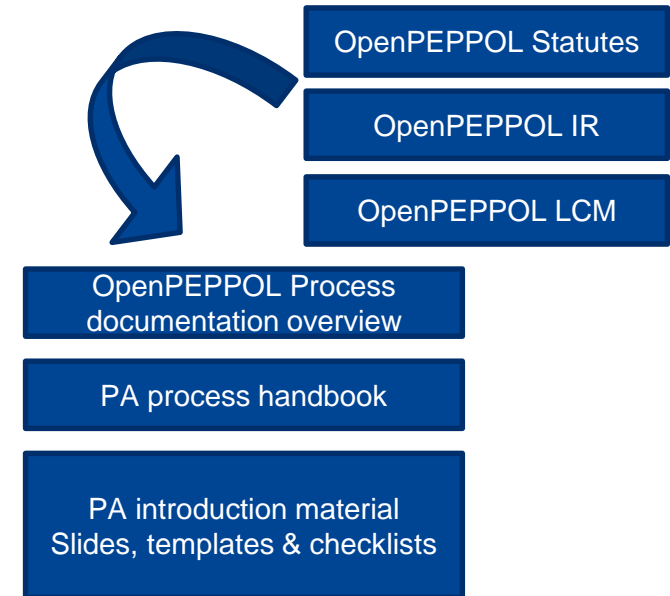
OpenPEPPOL Operating Office (Administrative and financial anchor point)

- Planning and coordination of PA education and clarification activities during engagement and onboarding.
 - Responsible for content of the introduction and education
 - Responsible for administration and planning of the sessions
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Guideline for PA education and Introduction(policy)

PA Education and Introduction are:

- loyal to official OpenPEPPOL process documentation:
 - OpenPEPPOL Statutes & Internal regulations
 - OpenPEPPOL LCM &
 - OpenPEPPOL CC governance processes
- provides knowledge about
 - The PA environment, roles and responsibilities
 - OpenPEPPOL Governance and collaboration
 - PA related Policies, process methods and tools
- are tailored to cover the setup of the new PA
- Supporting the PA operation by providing knowledge and documentation.
- planned managed and monitored as a project
- managed and operated by the OpenPEPPOL Operating Office – supported by existing PEPPOL Authorities and the Engagement and onboarding Lead
- including handout of a set of standard handbooks, presentations, templates and checklists.



PA Introduction and Education

- ▶▶ Documentation/information strategy
 - ▶▶ Overview of PA environment, roles and responsibilities
 - ▶▶ Process introduction in general
 - ▶▶ Assistance to be directly involved in
 - ▶ Service provider onboarding (MSA/TIA/Test/Certificates)
 - ▶ Support cycle (National & global)
 - ▶ Change management processes & CMB
 - ▶ CC community activities
 - ▶ CC ongoing teams
 - ▶ OpenPEPPOL WG activities
 - ▶▶ Communication guideline (roadmap to easy and valid communication)

- ▶▶ Onboarding Activities
 - ▶▶ 1 Kickoff Webinar
 - ▶▶ 4 process introduction/implementation Webinars
 - ▶▶ 1 Local OpenPEPPOL F2F kickoff and seminar

Plan for introduction and education

- ▶▶ **Getting started with introduction, planning and alignment of expectations;** Kick off Webinar (1,5 hour)
 - ▶▶ Presentation of the OpenPEPPOL PA introduction program (eg. Included Webinar planning)
 - ▶▶ OpenPEPPOL PA onboarding activities going Status and next steps
- ▶▶ **Framework for PA operation / general introduction;** Webinar 1 (2 Hours)
 - ▶▶ Introduction OpenPEPPOL Governance setup
 - ▶▶ Introduction to the PA Environment
 - ▶▶ Introduction to OpenPEPPOL PA roles and responsibilities
- ▶▶ **PEPPOL Governance, Support and Community structure;** Webinar 2 (2 hours)
 - ▶▶ PEPPOL Governance -TIA structure, processes roles and responsibilities
 - ▶▶ PEPPOL Support – structure roles and responsibilities
 - ▶▶ CC community activities – ongoing teams and WG activities
- ▶▶ **Service provider onboarding (Membership/TIA/Test/Certificates);** Webinar 3 (1,5 - 2 hours)
 - ▶▶ Service provider onboarding (Membership/TIA/Test/Certificates)
- ▶▶ **PA Processes, methods and tools;** Webinar 4 (1,5 hours / 2 hours if Hands on included)
 - ▶▶ PA procedures manual introduction
 - ▶▶ PA Tool introduction – e.g incl Hands on
- ▶▶ **Local OpenPEPPOL F2F kick-off and seminar** (Full day)

Templates and support document

- Templates
 - N/A
- Support documents to be used during the sessions
 - PA Introduction slides session 1-10
 - OpenPEPPOL Statutes & OpenPEPPOL Internal regulations
 - OpenPEPPOL official handouts
 - OpenPEPPOL PA process documentations
- Support documents for planning
 - N/A

Obligation and Documentation

- Education plan are to be documented in advance
- Participant list for each session are to be documented
 - New PA to provide Participant list in advance
 - PA coordinator to validate participation
- List of handed out material to be provided (incl version no.) *Included in Education session 9*
- Recruitment coordinator is responsible for revision plans, meeting minutes, status updates etc.
- Education materials and relevant Policies, processes and procedures are to be handed out to the PA participants after the meeting.
- PA are to organize and host F2F meetings and seminars.

ALL documentation to be send to Openpeppol@peppol.eu until OpenPEPPOL Shared space is in place.

Tools – Interim use

Templates

- Document templates to be used when available

Document Sharing

- Individual setup of Google drive & google docs is allowed during interim
- Mail distribution after meeting as possible solution

Meeting facility

- No common tool available, [Engagement and onboarding LEAD](#) to provide meeting space of own choice

Internal chat

- Skype used for internal chat during interim

Publication of results

- Results and deliverables to be send to Openpeppol@peppol.eu for publication when approved.

Tools – future structure

Templates

- Document templates to be used when available – shared through Confluence

Document Sharing

- Confluence to be used for D2D sharing and continuously access to newest version of process documentation

Meeting facility

- Confluence and Hipchat to be used for webinars and meetings

Internal chat

- Hipchat to be used for internal chat

Publication of results

- News items and success stories are made public available by the OO – according to the OpenPEPPOL communication policy