



Introduction to Policies for Information Access and Distribution


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WP40

2nd Workshop on the
XFEL Collaborative Design Effort
DESY, Hamburg, 12.05.2009


Three Made-Up Cases



- A partner lab which is on the way to join an XFEL Work Package asks to receive a set of drawings and/or a JT 3D-model by e-mail to get started working on the project
- A presentation at the XFEL project meeting discusses alternative concepts for a technical sub-system, some of which have been proposed by companies as part of an official offer in a tendering process. The presentation slides are put on the Web and may be found by the offering company.
- An external partner sets up temporary office at DESY for inspection activities. They are routinely provided with DESY PCs who can access the DESY intranet, including tools and group home pages.



What to do About Information Access?




- this talk - introduction to information access policies
- next talk - existing rules and regulations
- third talk - principles for managing information access


This is an “awareness rising” talk

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Reflecting Information Processes




- A person or an organization may

create
own
possess
access
use
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pass-on


} an information

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Reflecting Information Processes



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- Aim to provide policies (guidelines) for information access
 - Determine **who** can access information when
 - Determine **what for** access rights should be used
- Need to help individuals to decide on information requests
 - It's tricky: If you are not sure, ask before acting

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How to Control Access



XFEL Collaboration

WP x	PM	TC
------	----	----

WP y	XPO
	...

WP z	
------	--

partner institute

industry


subgroup

contract


- Access control needs to be linked with available structures
 - XFEL organization, i.e. WPs, Boards, Coordination ...
 - XFEL GmbH, partner institute, industrial manufacturer ...
 - process roles, e.g. reviewer ...
- Analyze read/write access for different types of information, e.g.
 - PPR documents of WP x
 - contribution from partner institute to work package
 - design drawing created in collaboration with industry
- Separate different access types
 - typically write access for small group, read access for larger group

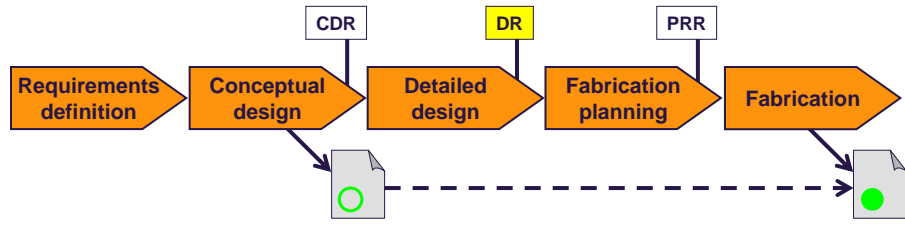
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3




How to Control Access (2)






- Access rights may (should?) change over time, e.g. Design Decisions may be confidential until fabrication is complete, but should become generally available for installation, operation and maintenance activities

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Keeping and Losing Item Control



- To control information access, users must authenticate and be authorized
 - need to use a technical system with password protection
 - may use EDMS for sharing information – done in several applications
- If documents are sent out, information access and further use can no longer be controlled
 - often unavoidable: should be done with consideration, not automatically
- Keep track of which information is sent out when
 - e.g., before sending out documents, store and release them in EDMS
 - advantage 1: history (with comments) is kept, documents are retrievable
 - advantage 2: documents are stamped with version and status → can be identified and validated at later times

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Accessing Items in EDMS

- **team environments** offer structured access to those items which team members need for their daily business – **local areas** for working items
- **projects** are **global archival areas** with **specific access policies** which are used for publication, data exchange and archival purposes
- lifecycles transfer items between teams and projects

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Item Accessibility

- item accessibility depends on responsibility for the item
 - item revisions **in teams** are only accessible to team members according to their team roles (either Viewer or Author)
 - item revisions **in projects** are accessible to project members according to the project's access policy
- in EDMS shown for each item as “access scheme in use”

XFEL_WP31

all of XFEL ← → WP31 members
can read can read and update

XFEL_WP31_internal

no access ← → WP31 members
beyond WP31 can read and revise


XFEL_WP31_Civil_Construction_internal

no access ← → only sub-group of WP31
beyond WP31 can read and revise


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Some Proposed Policies for Information Access




- Every WP gets a team workspace in the EDMS
- Every WP gets an associated project in EDMS for releasing items to (specific groups in) the XFEL collaboration
 - default access policy: all of XFEL can read, WP members can change
- Special projects (access schemes) can be set up on request and after agreement with the WPG leader
 - e.g. confidential (internal) projects where only WP members can read and change, projects for cooperation with external partners, ...
- Be as open as possible – apply only unavoidable restrictions
- Use EDMS to provide controlled information access
 - to other partners within our outside the XFEL collaboration
 - to document which information was made available for whom when
- In e-mails, send out stamped PDFs taken from EDMS

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Topics for Discussion



- Can you identify which of the proposed documentation is confidential – and for how long?
- Can you provide Venn diagrams for defining information access requirements? Or do you know a better way?
- Do we need to provide “data protection guidelines” for everybody who can access the EDMS? Or even with everyone in XFEL collaboration? Or do we even need to have written agreements with everybody?
- Should we inspect (let's say every ½-year) the EDMS accounts? I.e., provide lists of access rights to WPLs for confirmation?

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