

Sharepoint Manual for the Joint Action on Health Workforce Planning and Forecasting

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Getting started

The link to the site

<http://collab.health.fgov.be/sites/dg1/CW/JAEUHWF/SitePages/Home.aspx>

How to log in

Fill in “Name” and “Password”. You have received this information by email. Do not share your log in information with others!

Browser

Sharepoint is a web based tool that doesn't require any specific software. We have noticed however that a correct functionality of Sharepoint can depend on the internet browser you use. For example: Internet Explorer seems to work fine; Google Chrome on the other hand has difficulties opening some documents. If you are encountering some problems with Sharepoint, we kindly request you to first try and use another internet browser.

Evaluate the tool

Please test the tool and provide us with your feedback. Please also prepare the navigation menu you would like to have for your WP site (see WP1 for inspiration). You can leave your feedback and requests in the therefore foreseen document on the WP1 site :

Working documents – for review – Sharepoint comments and requests

First View

This is what you see in your browser when you've just logged in:

The screenshot shows the JAEUHWF website interface. At the top, there is a header with the logo and 'JAEUHWF > Home'. Below this is a navigation bar with tabs for 'JAEUHWF' and 'WP_1' through 'WP_7'. A search bar is located on the right side of the navigation bar. On the left side, there is a navigation menu with links for 'Public Documents', 'Calendar', 'Contact List', 'Recycle Bin', and 'All Site Content'. The main content area is divided into sections: 'NEWS' with a table of announcements, 'CALENDAR' showing a monthly view for August 2013, and a funding notice 'Funded by the Health Programme of the European Union' with the European Union flag.

Navigation menu :
this menu allows
you to navigate
within one site

Web site buttons: these buttons
allow you to browse from the
global site (JAEUHWF) to the
WP specific sites

Page content of the
current site

Header

The main site

Public Documents

This is a document library that contains global and overall information on the Joint Action. It can be viewed by all users but can only be changed by WP1.

The screenshot shows a SharePoint interface for the 'Public Documents' library. At the top, there are navigation tabs for 'JAEUHWF' and work packages 'WP_1' through 'WP_7'. A search bar is located on the right. Below the navigation, a sidebar on the left contains links for 'Calendar', 'Contact List', 'Recycle Bin', and 'All Site Content'. The main content area displays a list of documents with columns for 'Category', 'Author', 'Date', and 'Name'. The documents are grouped into categories: 'Approved deliverable (1)', 'External information (5)', 'Newsletter (5)', and 'Project information (8)'. Each category lists specific documents with their respective authors and dates.

Category	Author	Date	Name
Approved deliverable (1)	WP1	4/1/2013	JA Health Workforce - project policy
External information (5)	EC	4/18/2012	Comission Staff working document on an Action Plan for the EU Health Workforce
External information	EC	5/29/2013	Health workforce study 2012
External information	EC	5/29/2013	Health workforce study 2012 appendices
External information	OECD	6/26/2013	Health Workforce planning in OECD countries
External information	WHO	12/31/2011	Health professional mobility and health systems
Newsletter (5)	WP1	8/31/2012	JA Health Workforce - Newsletter issue 1 - August 2012
Newsletter	WP1	10/31/2012	JA Health Workforce - Newsletter issue 2 - October 2012
Newsletter	WP1	12/31/2012	JA Health Workforce - Newsletter issue 3 - December 2012
Newsletter	WP1	4/30/2013	JA Health Workforce - Newsletter issue 4 - April 2013
Newsletter	WP2	7/12/2013	JA Health Workforce - Newsletter issue 5 - July 2013
Project information (8)	WP1	4/1/2013	Grant Agreement JA EUHWF

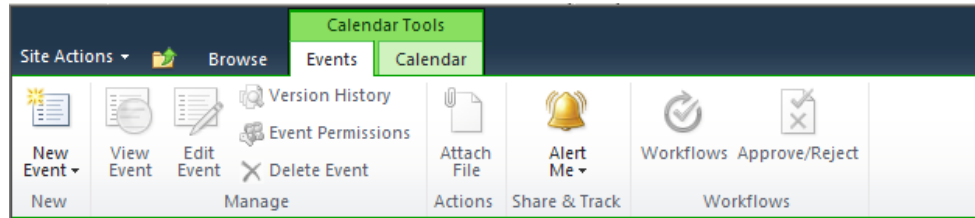
Calendar

The JA EUHWF global site provides you with a default calendar for tracking the Joint Action events. Every event, meeting, ... of the JA will be shown in this calendar.

The screenshot shows a calendar interface for August 2013. The calendar is displayed in a grid format with days of the week as columns and dates as rows. A sidebar on the left shows a list of 'Calendars in View' including 'Calendar', 'Plenary Assembly', 'Conference', 'Stakeholder forum', 'Executive Board', 'Work Package Leader Meeting', 'Work Package Leader Electronic Meeting', 'Bilateral meeting', 'Workshop', and 'Expert meeting'. The main calendar area shows a meeting event on Tuesday, August 20th, from 2:00 pm to 4:00 pm, titled 'WPLEM nr 3'. The current date is August 6, 2013.

HOW TO ADD A CALENDAR ITEM

- 1) Click “Calendar” in the left navigation pane.
- 2) Click the “Events” tab and then click “New Event”.
- 3) Type the information for your event.
- 4) Click “Save”.



Contact list

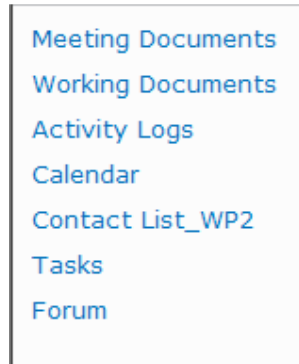
This contact list shows you the contact information of all partners within the project: associated partners, collaborating partners, EC, EAH. The contact list is managed by WP1

JAEUHWF	WP_1	WP_2	WP_3	WP_4	WP_5	WP_6	WP_7	Search this site...	
Public Documents									
Calendar									
Contact List									
Type Partner : Associated Partner (86)									
	Name	First Name	Country (abbr)	Acronym	Function	Organisation	Email address	Mobile phone	
	Sermeus	Walter	BE	BE_KUL	Work Package Team member	Catholic University Leuven	mailto:walter.sermeus@med.kuleuven.ac.be	(+32) 476255415	
	Bruyneel	Luk	BE	BE_KUL	Work Package Team member	Catholic University Leuven	mailto:Luk.Bruyneel@med.kuleuven.be	(+32) 16336915	
	Kostadinova	Todorka	BG	BG_MUV	Work Package Leader, Work Package Team member	Medical University – Varna	mailto:dora_kostadinova@yahoo.com	(+359) 889 588 408	
	Penova	Slava	BG	BG_MUV	Work Package Team member	Medical University – Varna	mailto:slava.penova@mu-varna.bg	(+359) 887 888 977	
	Radeva	Nikolina	BG	BG_MUV	Work Package Team member	Medical University – Varna	mailto:niki.radeva@mu-varna.bg	(+359) 876 952575	
	Generic mailbox		BG	BG_MUV	Work Package Leader, Work Package Team member, Budgetary contact,	Medical University – Varna	projects@mu-varna.bg		

The work Package sites

The navigation menu

The navigation menu for each WP site consist of the following standard libraries and lists:



The navigation menu of each WP site can be extended and adapted to the needs of every work package. Take a look at the WP1 site to see what is possible. If you want your WP site extended, please contact WP1.

Meeting documents and Working documents

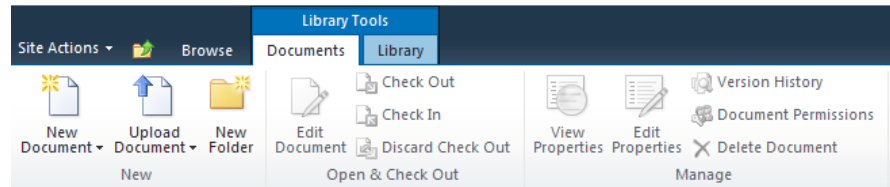
SharePoint 2010 uses a special kind of container – a Document Library – for storing files. Your WP site has 2 common default Document Libraries called “Meeting Documents” and “Working Documents” where you can put documents you want to share with others.

The library “meeting documents” was created to contain all documents related to meetings (invitation, agenda, meeting minutes, ...).

The library “Working documents” was created to contain all working documents of the WP, for example deliverables in preparation that are in draft or need review.

HOW TO UPLOAD DOCUMENTS

- 1) Click the document library in the left navigation menu.
- 2) Click “Upload Document” on the “Document” tab. Or click on “add document” in the page content



OR

<input type="checkbox"/> Type	Date Meeting	Name	Document type	Meeting type	Status
Meeting type: Conference (1)					
	4/11/2013	130411_WP2_Kick-off-MoHSK	Presentations	Conference	Final
Add document					

- 3) Click “Browse” and select a file to upload.
- 4) Click “OK”.
- 5) Fill out the required information fields.
- 6) Click “Save”.

IMPORTANT: HOW TO NAME DOCUMENTS

All documents uploaded on the Sharepoint site should be named using the following structure: “yymmdd_WPx_description”. This name has to be given to the 5th step of ‘how to upload documents’

Activity Logs

This library will allow every associated partner to upload his activity log to the correct WP site. The associated partner has to indicate until what date his activity log is up to date. Afterwards, the work package leader concerned can indicate if he approves the activity log.

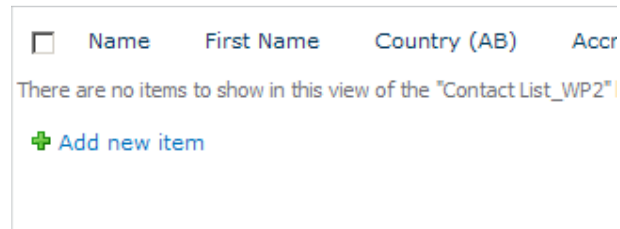
Contact list WP

If your WP wants to keep track of a contact list besides the global contact list on the JAEUWHF site, it can be done here. It is possible to add extra columns to the contact list (for example for mentioning skype name), or leave other columns out (for example if post address is not necessary for you). Please contact WP1 if you want to add or delete a column.

HOW TO ADD AN ITEM TO THE CONTACT LIST

To add one item

Click on the “add new item” button and fill in the required fields



To add multiple items

For adding an existing contact list with multiple items, there is a faster way to proceed than adding items one by one. Please contact WP1 if you want to add an existing contact list.

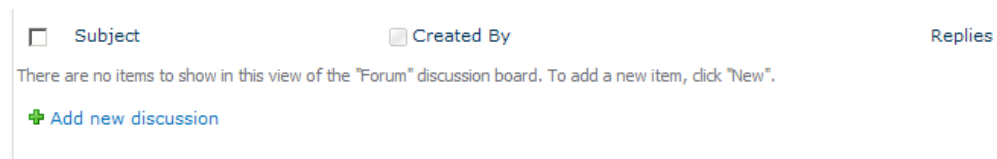
Tasks and Forum

Those two elements allow you to (1) create a to do list for your WP and (2) start up a forum discussion for your WP.

HOW TO ADD AN ITEM TO THE TASKS LIST AND FORUM

The principle is always the same:

Click on the “add new item” button and fill in the required fields

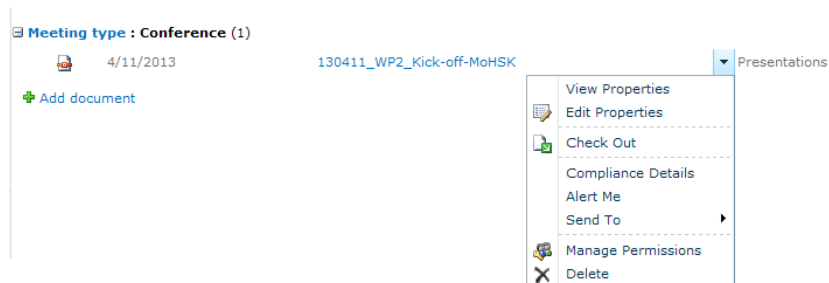


Working together in documents

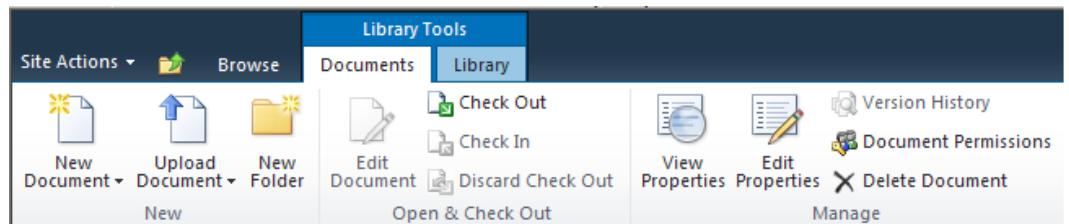
Working with documents

SharePoint 2010 allows multiple persons to edit documents or add comments, without losing track of the document history. Sharepoint provides two methods for working in documents:

- Each document has an “Edit” menu that you can use to take some action on that document, such as checking it out for editing. You see the Edit menu when you hover your mouse over the “Name” property of your document. With the “Edit” menu, you can view and edit properties.



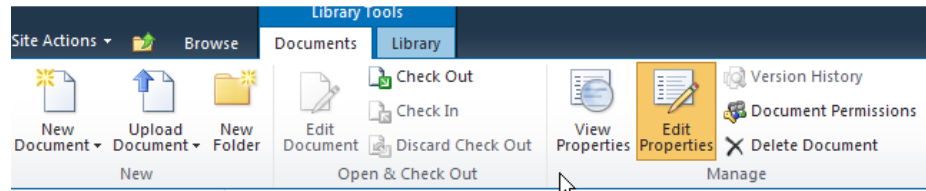
- The Ribbon also displays a set of actions that can be taken on individual documents or a group of selected documents.



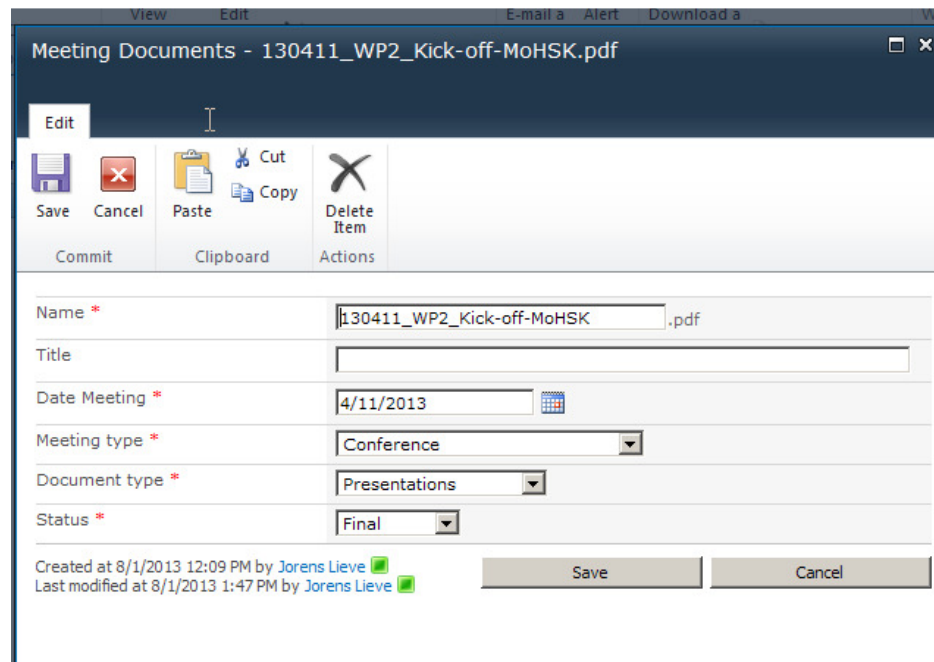
HOW TO EDIT A DOCUMENT'S PROPERTIES

The document properties are the characteristics of the document (name, date, ...) The easiest way to edit a document's properties is to use the Ribbon:

- 1) Select the document in the Document Library.
- 2) Click "Edit Properties" on the "Documents" tab of the Ribbon.



- 3) Make the changes and click "Save".

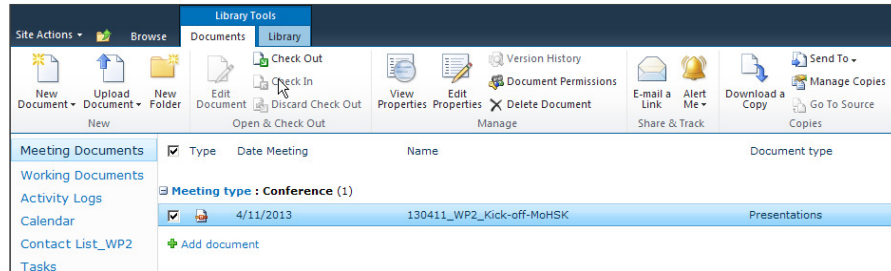
A screenshot of the 'Edit Properties' dialog box for a document. The title bar reads 'Meeting Documents - 130411_WP2_Kick-off-MoHSK.pdf'. The ribbon shows 'Save', 'Cancel', 'Paste', 'Copy', and 'Delete Item' buttons. The form fields are: Name (130411_WP2_Kick-off-MoHSK).pdf, Title (empty), Date Meeting (4/11/2013), Meeting type (Conference), Document type (Presentations), and Status (Final). At the bottom, it shows 'Created at 8/1/2013 12:09 PM by Jorens Lieve' and 'Last modified at 8/1/2013 1:47 PM by Jorens Lieve', along with 'Save' and 'Cancel' buttons.

Check documents in and out

Attention, whenever editing the content of documents, always check them out first! Checking out a file prevents other users from editing the file while you are working on it. New edits you make do not show until you check the file back in.

TO CHECK OUT A DOCUMENT:

- 1) In your Document Library, select the check box next to the document you want to check out.
- 2) Click “Check Out” on the “Documents” tab of the Ribbon.



- 3) Click “OK”.

HOW TO CHECK IN A DOCUMENT:

- 1) Click the check box next to the document that you want to check in.
- 2) Click “Check In” on the “Documents” tab of the Ribbon.
- 3) In the Check in dialog box, do any of the following:
 - Select “Yes” or “No” to keep the file checked out or not.
 - Enter any comments to include in the document’s revision history.
- 4) Click “OK”.