Once-Only Technical System Projectathon Participant playbook V4.00

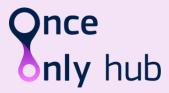


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Document history

| Version | Date | Change editors | Changes |
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| | | Fanny Serre (Kereval) | Technical System Projectathon |
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| 2.0 | 08/05/2023 | Marie-Laure Watrinet (EC, DIGIT, EXT) Thomas Fillis (EC, DIGIT, EXT) Maarten Daniels (EC, DIGIT, EXT) Michael Ulrich (EC, DIGIT, EXT) | Update after April Projectathon for the June Projectathon |
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| 4.0 | 12/02/2023 | Marie-Laure Watrinet (EC, DIGIT, EXT) | Update for 2024 Projectathons, first draft for May 2024 Projectathon |

1 OOTS Projectathon Team presentation

The preparation of the Once-Only Technical System (OOTS) Projectathons requires the combined effort and input of a diverse and evolving set of contributors.

In addition to the existing OOTS team members involved in the sub-groups or other working tracks that will contribute to the Projectathons, we have contracted Projectathon experts who have been successfully preparing and executing Projectathons around the world (also known as *Connectathons, Integratathons, Plugathons*, etc.).

Even more importantly, Projectathons require Member State contributors, ranging from Member States National Coordinators and sub-group experts to national or sub-national development or integration team members to actively collaborate in the preparation and execution of these important events. One of the main priorities for 2024 is to engage Competent Authorities¹ and more specifically the Evidence Providers to ensure that as many evidences as possible are available through the OOTS.

Finally, during the Projectathons, a group of Monitors, familiar with the OOTS specifications or with the <u>building blocks</u> that are reused in the OOTS architecture, such as <u>eDelivery</u> and <u>eID</u>, will participate to help and validate the peer-to-peer transactions relevant to their areas or expertise.

1.1 OOTS team members in the European Commission

The OOTS team members in the European Commission working on the Projectathons are:

- Sub-group editors and their respective teams:
 - O The Testing and Deployment sub-group editor *Maarten Daniels*, the OOTS Specifications sub-group editor *Pim van der Eijk* and Evidence Mapping sub-group editor *Nils McGrath* play a significant role in the Projectathon preparation as their sub-groups are directly involved in and/or impacted by the Projectathons.
 - The Security sub-group editor Alice Vasilescu, the Operational Governance sub-group editor Rena Gurbanova and Standardisation of Data Models editors Pavlina Fragkou and Claudio Valle will contribute to the extent that their sub-group contributions are relevant to a specific Projectathon event.
- The Commission Common Services development team led by *Jerry Dimitriou* will provide acceptance instances of the Common Service components such as the Evidence Broker and

¹ Competent Authority: any Member State authority or body established at national, regional or local level with specific responsibilities relating to the information, procedures, assistance and problem-solving services covered by the Single Digital Gateway Regulation (SDGR).

Data Service Directory, such that they can be used in the steps of peer-to-peer tests between participants.

- The EC OOTS Support team led by *Flora Kardos* extends their current advice and support desk with (technical) advice and support related to the preparation or execution of the Projectathon registration and tests.
- The OOTS communications team led by Michael Ulrich, and supported by Thomas Fillis, maintains and animates the Once-Only Hub (website), promoting the Projectathons and their results, the supporting Implementers Café series and other events, social media coverage and the OOTS Projectathon collaborative space in preparation of the Projectathons.
- The Commission project managers *João Rodrigues Frade, Caroline Corneau* and *Fernando Diaz* oversee the overall progress and coordination of the Projectathon events.

1.2 Additional Projectathon experts

We have contracted experts from *IHE* and *Kereval* that have been working on Projectathons and other integration or peer-to-peer testing events, mainly in the healthcare sector around the world for many years. Their contributions are manifold, as they have been successfully organising, conducting, and following up on these closely related events. Our Projectathon experts:

- Bring a set of tried and tested testing (management) tools, primarily based on the Gazelle platform (which integrates with and/or interacts with the GITB test platform that is already used in the OOTS component level testing).
- Assist in the data/test modelisation of the OOTS specifications.
- Assist in providing best practices and guidance to the preparation and execution of the events.

The Testing & Deployment team was reinforced in January 2023 with *Marie-Laure Watrinet* from LIST (Luxembourg Institute of Science and Technology), bringing her testing and Projectathon experience from the TOOP Large Scale Pilot.

1.3 Member State contributors

The Projectathons require Member State contributors, ranging from National Coordinators and subgroup experts to national or sub-national development or integration team members, to actively collaborate to the preparation and execution of the Projectathon events. The engagement of Competent Authorities is one of the main priorities of 2024. More specific roles, responsibilities or activities are explained throughout this document.

It is important to highlight that active participation from Member States is crucial. It should therefore be agreed that this is a high priority topic as it is relevant to the development, testing and deployment into production of the Once-Only Technical System components by the Member States.

1.4 Monitors

Monitors are neutral experts, familiar with the Once-Only Technical System specifications or with <u>building blocks</u> that are reused in the Once-Only Technical System architecture, such as <u>eDelivery</u> and <u>eID</u>. They will participate in the Projectathon events to help and validate the peer-to-peer transactions relevant to their areas or expertise.

The Commission teams will source experts from relevant projects and prepare them with the needed background information and instructions so they can participate in the Projectathons successfully. The number of Monitors depends on the type of tests being executed and the number of participants.

2 What is a Projectathon?

A Projectathon is an event where different systems connect under one roof, physically (or virtually) and perform a marathon of peer-to-peer interoperability and compliance tests in a structured environment for several days. The tests are supervised and verified by neutral experts acting as Monitors.

The table below presents the definitions of technical terms used during Projectathons and supported by Gazelle.

Table 1: Projectathon – Gazelle definitions

| TERM | DEFINITION | | |
|-----------------------|---|--|--|
| Gazelle | Gazelle is a test bed aimed at testing the interoperability of eHealth information systems. It is developed by IHE-Europe with the support of several other IHE countries (USA, Japan, Korea, and Australia). | | |
| | The Gazelle platform is now reused in the OOTS domain. This means that sometimes the tool in its current version will display information that relates to the health sector and/or to IHE, but that can be ignored in the context of the OOTS Projectathon. | | |
| (INTEGRATION) PROFILE | Specification of the information exchanges to support a specific business process (i.e., eIDAS Profile, OOTS Evidence Exchange Profile, Metadata Management Profile). | | |

| ACTOR | Functional component of a system that exchanges transactions with other actors as defined in an Integration Profile (i.e., for the OOTS Evidence Exchange Profile: Common Services Query Interface Client, Data Service Directory, Evidence Broker, Evidence Requester and Data Service). |
|-------------|---|
| TRANSACTION | Specification of a set of messages exchanged between pairs of actors in support of an Integration Profile. |

The May 2024 Projectathon will be based on the production version of the Once-Only Technical Design Documents.

Previous Projectathons were an opportunity for all parties to learn, make mistakes, help each other and to assess the status of their respective Once-Only developments. The October 2023 event focused on assessing production-readiness of the Once-Only Technical System components. In 2024, the Projectathons (May and October) will be thematic², to enable evidence exchange between competent authorities in specific domains. The May 2024 Projectathon (Projectathon #4) will focus on Education and Population data, and on linking the Once-Only Technical System with related systems such as EMREX. The October 2024 Projectathon (Projectathon #5) will focus on Vehicle data and Business data, and on linking the Once-Only Technical System with related systems such as EUCARIS and BRIS.



Figure 1: Two Projectathons for 2024

Those test cases prepared for the previous Projectathons form the baseline of this event. Ahead of the May 2024 Projectathon, the Commission and participating teams will discuss together how to

² The 21 SDGR procedures can be found here: https://ec.europa.eu/digital-building-blocks/sites/display/OOTS/About+OOTS.

update existing test cases or add new test cases to best facilitate the assessment of production readiness.

A high-level overview and summary of current test cases is available to the Testing and deployment sub-group (restricted access).

The full test cases with detailed step-by-step descriptions will be made accessible later via the Gazelle platform (restricted access).

In addition to the main plenary testing track, this event will allow for some more advanced scenarios to be discussed in dedicated exploration sessions or in a restricted test session between teams interested in such scenarios.

The tests will start with static and pre-agreed data. This is to be discussed in and shared through the relevant Testing and deployment sub-group (restricted access) and/or collaborative space on Teams. Those Member States that want to go further and create custom datasets or dynamic datasets for bilateral tests are invited to do so as well.

In order to get most benefits from a Projectathon the aim is to be fully automated during the May 2024 Projectathon and only use the manual or tooling steps to get up to speed before the event or during the setup stage.

NB: the present version of the Projectathon playbook does not contain information about the Member States teams that have signed up for the event, nor about the development and test status of their component as this will be followed up in <u>country profiles</u> and/or other status meetings.

NB2: the current Playbook and its annexes include general information. Additional information will be consolidated via a dedicated MS Teams channel.

NON-DISCLOSURE AGREEMENT (NDA) and DISCLAIMER

Participants should only use the information from the Projectathons to directly improve their own systems and to not make any public announcements containing other parties' test results in an identifiable way.

The Projectathon process is an event to facilitate interaction, test interoperability and an opportunity to find issues. However, this event is in no way a formal certification process and/or does not provide an absolute guarantee that components or systems will operate without issues in a real production environment or in all possible usage variations that might be encountered at go live or thereafter.

Moreover, the marking of test results is done in best effort mode, based on the understanding of today's specifications and ongoing discussions. Changes in the specifications or in our common understanding of the system might result in previous test result markings to become outdated.

3 What are the benefits of participating in a Projectathon?

Participating in a Projectathon has the following benefits:

- The test platform, tooling and test cases are configured and defined by the organisation and experts who created the specification. It is an excellent opportunity for participants to verify that their systems or solutions effectively comply with the appropriate specifications.
- The participant performs peer testing with real systems (or their acceptance/staging instances) using real-world scenarios. Issues or errors can be identified, corrected, and retested on the fly during the Projectathon or shortly thereafter. This significantly reduces the number of potential issues that can occur in the production environment. One of the key principles of testing is to detect an error as soon as possible as this reduces the cost of implementing and re-testing a fix.
- It is a good opportunity to meet relevant experts in the field to share and exchange views, experience, and best practices.
- It helps to promote and increase the visibility of the status and readiness of your organisation or Member State.
- The Projectathon is not only a place to test your system; your participation also helps to improve and assess the proper functioning of the Technical Design Documents (TDDs) of the One-Only Technical System.

• In the previous April and June Projectathons, Member States had the opportunity to participate in Projectathons as observers and in this way could be ready for the next Projectathon by getting in direct contact with active participants that do agree to share explanations on what they are doing. In the October 2023 Projectathon, only registration as an active participant was possible. In the 2024 series, there will be again the observer role that could be for a Member State, for a participant of one actively participating Member States, or for a Competent Authority of a Member State.

4 What are the teams/actors in a Projectathon?

Table 2: Projectathon teams/actors



The **Organiser Team** is the organisation with overall responsibility for the Projectathon event. It hosts the event, defines the test scope, call for participants and contracting with participants, and takes care of the logistics such as the event venue, network, and staff hiring.



The "Gazelle" platform test management tool manages all the elements necessary for peer-to-peer interoperability tests. It offers a series of tools (validators and simulators) to verify the compliance of messages and documents with specifications or to test the interoperability of an application during a controlled test. This platform originated from the eHealth domain but can be reused in different contexts where peer-to-peer interoperability tests are relevant. The day-to-day results are presented in the Projectathon dashboard.



Test Module Designer is the expert in the domain. The test module designer defines and documents the test plan, test cases and maintains test data in the "Gazelle" platform test management tool.



The **Test Session Manager** is the coordinator between participants and the Organiser Team. She/he hosts the technical topics related to webinars, and assists participants during the registration, preparatory test and Projectathon. Furthermore, the Test Session Manager evaluates the systems based on the grading from the monitors and communicates the results of the test session to the organisers and participants. The test reports as well as the lessons learned and best practices are presented in the Projectathon report.



During the registration phase, the Member State participants identify which tests they can or want to carry out during the Projectathon. The **System Under Test (SUT) operator(s)** configure and connect their SUT to "Gazelle". During the Projectathon event, the SUT operator(s) date(s) with available partners, for a specific procedure, and execute(s) the peer-to-peer tests with them. SUT operators can be on-site or online, but it is highly recommended to be on-site. They can be coordinators having a direct line to the team

working remotely and/or technical people. At least one representative should be on-site. It is to be noted that one of the main priorities of 2024 is the engagement of Competent Authorities, so it would be good to have them in the MS teams as well.

See Chapter 7 - How to participate in the OOTS Projectathon? See Chapter 10.3 - What are the requirements for the System Under Test (SUT) operator(s)?



Monitors support the participants during the execution of the tests. They grade the tests based on objective evidences and criteria. If needed, they proceed to the necessary clarifications of the specifications, the descriptions of the tests or the tools. They evaluate the test with the "Gazelle" platform test management tool and grade it as verified, partially verified, or failed.



The main objective of an **Observer** is to observe and to learn what a Projectathon is, how peer-to-peer tests are executed, to prepare themselves for the next Projectathon event. They observe the tests via screen-sharing or sit in pairs with the volunteering participants who are performing the test profile they are interested in. It is highly recommended to be on-site.

In the 2024 series, there will be again the observer role that could be for a Member State, for a participant of one actively participating Member States, or for a Competent Authority of a Member State. See Chapter 9 for details.

4.1 How is the Projectathon organised?

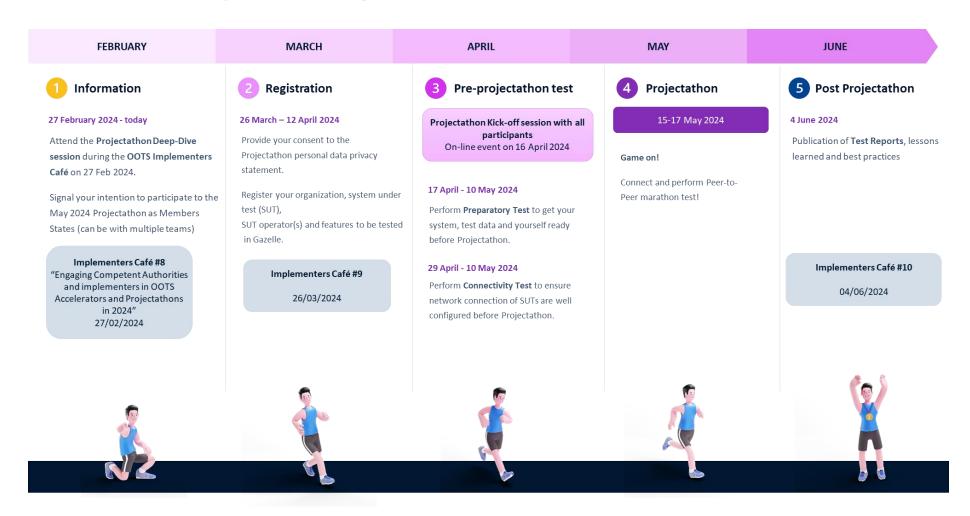


Figure 2: May 2024 Projectathon #4 organisation

About the other OOTS Projectathons:

- Projectathon #1 took place on 19-21 April 2023.
- Projectathon #2 took place on 14-16 June 2023.
- Projectathon #3 took place on 18-20 October 2023.

The European Commission invites the SDG National Coordinators to register for the Projectathon event via an event registration form (using EU Survey). They should share the link to the event registration form with each person joining the Projectathon from their Member State. It is mandatory for every participant to fill in the event registration form (it is a pre-condition for getting access to the Gazelle platform). **Please register on time, this is also needed for the catering**.

5 What to do and what to expect at the Projectathon itself?

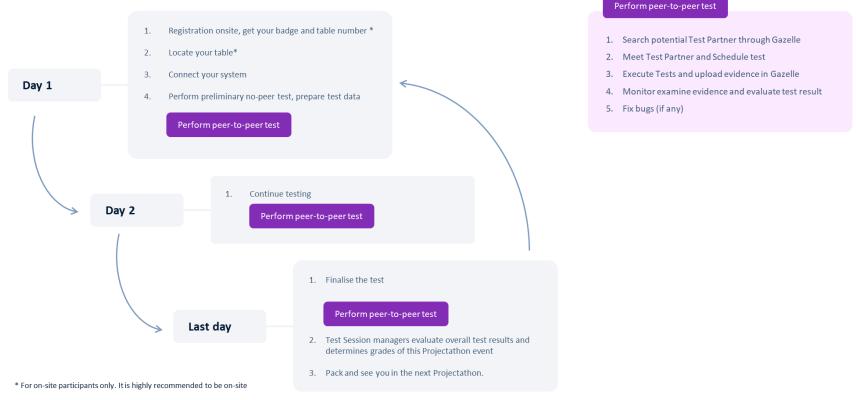


Figure 3: Steps during a Projectathon event

6 What is peer-to-peer testing?

The figure below presents the peer-to-peer testing process.

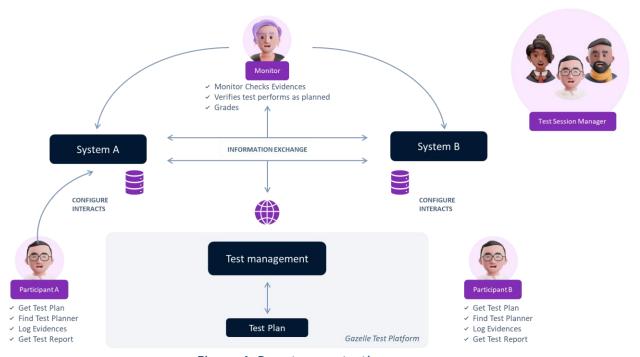


Figure 4: Peer-to-peer testing process

- 1. Participant A with System A and participant B with System B participate in the Projectathon³.
- 2. Through Gazelle, participant A found a potential test partner: participant B with System B. Participant A approaches participant B to perform an interoperability test together.
- 3. Both agree and schedule a time to perform the interoperability test together or start testing immediately. They record the test in Gazelle.
- 4. The monitor, informed by Gazelle that a test has to be examined, claims the test, and examines it. She/He ensures it is performed correctly and verifies the test result with the help of log files and validators used. If proofs are missing, the monitor asks to the Member States to provide more information.
 - If the test failed and participant A finds out the bug came from their system, participant A can fix the bug immediately and perform the test again. Depending on the severity of the bug and time available to fix it, the next scheduled tests may have to be rescheduled. In this

³ Note that Participant A will not test with Participant B during the whole Projectathon. Each one will test with as many as possible other Projectathon Member States participating. It is also possible to start a same test with different Member States at the same time (mostly for Member States having a more mature system).

case, the participants can change the status of the test to "Paused" and restart the test later when they are ready.

In case the (blocking) bug comes from the Common Services provided by European Commission (which should not be the case), a specialist will try to fix the bug immediately and inform partners when the correction is done. If it is not blocking, the correction will be done outside the Projectathon itself.

A dashboard is shared with Projectathon participants showing day-by-day progress results.

7 How to participate in the OOTS Projectathon?

The Projectathon registration is composed of the following consecutive steps:

- 1. The Organising Team invites the National Coordinators to register for the Projectathon event via an event registration form (using EU Survey)
- 2. National Coordinators register for the Projectathon event via EU Survey. They share the link to the event registration form with each person joining the Projectathon from their Member State (including the Competent Authorities). It is mandatory for every participant from a Member State to fill in the event registration form for the May 2024 Projectathon (it is a pre-condition for getting access to the Gazelle platform). Please register on time, this is also needed for the catering.
- 3. Once the event registration process is completed (see Step 2), the Supporting Team invites National Coordinators to encode their organisation and users (team members) in the Gazelle platform (active participants only). Note that all participants will have to register again in 2024 (2023 data has been anonymised and removed from Gazelle). In case you need test related data for archiving or auditing purposes, don't forget to archive your data in Gazelle at the end of the year since data will be again anonymised and will be deleted one month after the end of the year (around end of January 2025)
- 4. National Coordinators select the relevant test session (May 2024) and add your System(s) Under Test (SUT) in the Gazelle platform (active participants only). Note that since data of 2023 has been anonymized in Gazelle and because there is a new modelisation for 2024, you will have to recreate your SUT.

Please note that it is the **responsibility of each Member State National Coordinator** to ensure that the actions described in the process below are respected. For example, the National Coordinator shall select which person from his/her Member State should participate in the Projectathon event and is responsible for the correctness and completeness of this list of experts. He/she is also responsible for defining who will register the organisation and participants in the Gazelle platform, who will participate in different meetings and will carry out the tests.

Table 3: OOTS Projectathon participation process

Information



Attend the OOTS Implementers Café 2024 #8 on 27 February 2024, as well as the OOTS Implementers Café 2024 #9 on 26 March 2024.

The registration period runs from 26 March to 12 April 2024.

Fill-in the event registration form (via EU survey) and accept to have read and understood the content of the Projectathon Playbook and Privacy Statement. It is mandatory for every participant of a Member State to fill in the event registration form (it is a pre-condition for getting access to the Gazelle platform). Participants and observers must register for each individual Projectathon. Please register on time, this is also needed for the catering.

Registration



The Support Team sends a confirmation email to you once your registration to the Projectathon is accepted. We will get in contact with you as from 8 April with more information about how to register and create your SUT in the Gazelle platform. Since 2023 Gazelle data has been anonymised, you will have to register again in 2024 and to create you SUT according to the new modelisation.

Register the system and participants in Gazelle. Note that since data of 2023 has been anonymized in Gazelle and because there is a new modelisation for 2024, you will have to recreate your SUT. In case you need test related data for archiving or auditing purposes, don't forget to archive your data in Gazelle at the end of the year since data will be again anonymised and will be deleted one month after the end of the year (around end of January 2025)

If not already done, register to the Microsoft Teams Implementers Space via the <u>Service Desk</u>. This Teams channel is made available for everyone that

registers and participates to the Projectathon to facilitate knowledge-sharing and closer collaboration.

Congratulations: you can proceed to the next steps!

Pre-Projectathon test Participate in the Projectathon Kick-off session with all participants: online event taking place on **16 April 2024**.



Perform Pre-Projectathon Test(s) that include preliminary tests and connectivity tests. See more details in Chapter 8. Pre-Projectathon Test(s). Gazelle is open for Preparatory Test from 17 April to 10 May 2024 and for Connectivity Test from 29 April to 10 May 2024.

Projectathon



You are ready to participate in the **15-17 May 2024 Projectathon**.

Post-Projectathon



Check the test reports, lessons learned and best practices to assess your situation, check if improvements can be made.

Please respect timings as this is important for the organising team and other participants.

It is recommended for the Member State teams to be on-site, or at least have one representative on-site. Indeed, 2023 Projectathons demonstrated that on-site presence offers more benefits than remote participation. Member States who had at least one person on-site could more easily reach out to Monitors and the Support team, could get assistance from other Member State teams on-site and were more efficient in finding test partners.

Member States that cannot bring a full team on-site can alternatively choose for a hybrid team with on-site representation. Participating teams that experienced this hybrid mode of working, with a representative on-site and a team remotely that can execute tests and bug-fixing indicated that this set-up could be efficient as well.

Before the Projectathon, prepare a planning across your team and a target division of work, related to both test case execution and exploration room participation to fully benefit from all the opportunities that a Projectathon event offers.

Below can be seen a set of lessons learned related to Projectathon testing during the 2023 October Projectathon:

- In preparation of the October Projectathon, based on the Member State teams' feedback of the June Projectathon, the testing and deployment sub-group prepared a template to be used as **overview sheet** of Member State capabilities and a Projectathon contact point before and during the October event.
 - This way Member States could complete necessary supporting information and could properly prepare with which other partners to perform tests (during preparatory tests and/or actual Projectathon tests).
 - In the end, this capabilities overview sheet was completed and used by most Member State teams. Moreover, the feedback was that this concept was useful and should be repeated in the future for preparing test rounds or test executions.
- The Test Cases executed were relatively stable (with some adaptations in the details of the test steps and verifications) across all three Projectathons in 2023.
- For future testing events, we suggest that Member State teams go further than the currently defined and tested (generic) Test Cases and propose some variations to existing Test Cases or more domain specific Test Cases.
- Even though we were expecting Member State teams to propose more custom data sets and/or use dynamic data sets, most of the Test Case executions were relying on the preshared and pre-agreed data sets that have been taken over (with some adaptations) from previous Projectathons. Some teams used different, custom or dynamic data sets and resultingly, additional Member State teams should bring forward more diverse data sets.
- The Gazelle live dashboard that was introduced in the October Projectathon was a useful new feature. It reduced manual work in providing statistics, was flexible to adapt as needed and received positive feedback from most Member State teams.
- Some issues or configuration difficulties found during testing were at least partially caused by not using the latest version of software solutions. Accordingly, users are advised to track the software updates to benefit from the latest security patches, bug-fixes and improvements to their components and environments.

8 Pre-Projectathon Test(s)

Good preparation saves time, so you can do more actual testing during the Projectathon. It was noticed that preparatory test cases and connectivity tests have been very valuable for the 2023 events for understanding the context and checking/troubleshooting issues in advance of the event. Also, the Member States teams that performed more preparatory test cases and connectivity tests in general were able to perform tests more efficiently during the actual events.

8.1 Preparatory Test

The Preparatory Test is a preliminary test before Projectathon, which allows you to:

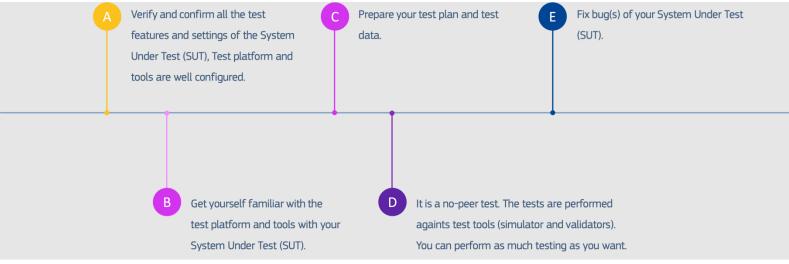


Figure 5: Preparatory test steps

8.1.1 How to perform Preparatory Tests?

It is important to attend the "Projectathon Kick-off session" on 16 April 2023 to understand the configuration and how the test platform works before performing the test and the steps below.

1. Connect to Gazelle and go to the Projectathon Test Session.

- 2. Verify all the Profile/Actor/Transaction items registered for the test are well configured in the Gazelle Test Manager platform.
- 3. Prepare the test plan and test data. It is especially important not to use production data to protect users' privacy, for more information, refer to the Data Privacy section.
- 4. Follow the test case instructions and start the preparatory test.

8.1.2 Will the Preparatory Test be graded?

The preparatory test will <u>not</u> be graded by the Monitor. The test result (success/failures) is displayed immediately by the tool. You will upload the evidence of your preparatory tests (logs, screenshots) into Gazelle Test Management. However, the Projectathon technical management team will perform random checks on your uploaded test result to ensure you have executed your tests and are ready for the actual Projectathon.

As there is a positive correlation in Projectathon test results and preparatory test results, we strongly encourage all teams to perform as many preparatory test cases (both marked as mandatory and as optional) in advance of the event.

Optional ones are recommended as well for comprehensive preparation.

8.2 Connectivity Test

8.2.1 What is Connectivity Test?

The Connectivity Test is **mandatory** to all the onsite/online/hybrid participants that are operating a System Under Test (SUT), since all SUTs are expected to be available online and capable to make/receive connections to/from other SUTs. The objective of the Connectivity Test is to diagnose possible network problems before the actual Projectathon such as verifying the firewall configuration, DNS registration and port access rights to ensure all the nodes and machines from different test participants can communicate with each other during the actual Projectathon. The reason why SUTs cannot just be available on a local computer inside the event location, is that the event location will have a restricted network access, meaning that most or all incoming connections will be blocked. SUT operators will be able to connect to and control SUTs that are publicly available on the internet and SUTs on the internet should be able to communicate with each other.

8.2.2 How to perform Connectivity Test?

Prerequisites: all the systems are up and running on the internet with a public static IP address. The detailed step-by-step Connectivity Test will be provided later or during the Projectathon Kick-off meeting on 16 April 2024 because the System Under Test must be registered in Gazelle test management tool to perform the test.

Lessons learned from the 2023 Projectathons about Connectivity tests are:

- Those Member States that updated their configuration or connectivity details last-minute struggled to find suitable test partners. The support team provided sample AS4 PMode files and truststores and could regenerate them quickly, but still, test partners had to update their configuration to be able to test with these Member States. Therefore, it is crucial to highlight the importance to finalise the system under test configuration on Gazelle before the connectivity testing period starts and to properly perform the connectivity tests before the Projectathon to reduce the chance of losing testing time due to connectivity issues during the event. Changing the configuration after the start of connectivity tests should also be avoided when possible, since it leads to retests across all other teams.
- Security settings inside Member State organisations are sometimes blocking the testing and they are difficult to solve in a short time as it requires some (heavy) organizational procedures to be followed (e.g., the return URL topic).
- In preparation of the June and October 2023 Projectathons, the Once-Only Technical System support team facilitated distribution of eDelivery AS4 P-Mode files and trust stores for the sample AS4 implementation (Domibus). This is also useful for Harmony users as the configurations are similar or at least close. Therefore, this distribution benefited most participants.
- Some connectivity issues were detected during the connectivity testing phase and during the October 2023 Projectathon, mostly related to certificates. Although issues are never welcome, it is positive that they have been detected, so that they could be addressed before actually going into production.
- Similar to previous Projectathons, the testing and support teams shared some useful sample data with Member State teams to facilitate their system configuration and preparation. This seems to have been much appreciated by most participating teams and if there are suggestions for future improvements, teams are encouraged to provide their feedback. This includes:
 - PMode configurations for the eDelivery sample software and truststores containing all public keys of Access Points as provided by Member states teams
 - Evidence exchange examples (requests, responses and errors messages)
 - Common Service lookups (postman projects for Evidence Broker and Data Service Directory queries)

9 How to participate in the OOTS Projectathon as an observer?

In the 2024 series, there will be again the observer role that could be for a Member State, for a participant of one actively participating Member States, or for a Competent Authority of a Member State.

9.1 Pre-Projectathon observer preparation

Note that it is the **responsibility of** each Member State **National Coordinator** to make sure that the actions described in the process below are respected. He/she is the one that will also select which person of his/her MS should manage the different actions such as who fills in the EC online registration form, who registers the system and participants in Gazelle, who participates in the different meetings, and who does the tests. It is **mandatory** for every participant of a Member State to fill in the registration form, even if participating as an (individual) observer.

Table 4: Pre-Projectathon observer preparation steps

Attend the OOTS Implementers Café 2024 #8 on 27 February 2024, as well as the OOTS Implementers Café 2024 #9 on 26 March 2024.

The observer registration period runs from 26 March to 12 April 2024.

Fill-in the event registration form and accept to have read and understood the content of the Projectathon Playbook and OOTS Projectathon privacy statement. It is mandatory for every participant of a Member State to fill in the event registration form (it is a pre-condition for getting access to the Gazelle platform). Participants and observers must register for each individual Projectathon.

The Support Team will send you an email once your Observer application is accepted to the Projectathon.

Register to the Microsoft Teams Implementers Space via the <u>Service Desk</u>. This Teams is made available for everyone that registers and participates to the Projectathon (actively or as observer) to facilitate knowledge sharing and closer collaboration.

Pre-Projectathon

test



Participate in the "Projectathon Kick-off session" with all participants: remote event taking place on **16 April 2024**.

Projectathon



You are ready to participate as an observer in the 15-17 May 2024 Projectathon.

Post-Projectathon



Check the test reports, lessons learned and best practices to assess your situation, check if improvements can be made and prepare for a new Projectathon event.

Please respect timings as this is important for the organising team and other participants.

9.2 Projectathon-observer activities

- 1. Projectathon Tour:
 - a. Take a tour of the Projectathon and engage with one or two participants to share and explain what they are doing.
 - b. It can be done in groups or by screen sharing.
 - It is important to provide an environment where the participants can concentrate on the tests/debugging and do not have too many disruptions.
 This means that observers should pay attention to not intervene at an inappropriate time.
 - ii. In case some participants hesitate to share their screen, please respect this as an observer.
 - c. Engage in discussions in between test sessions or during breaks to understand what was done and what is needed to prepare your participation during a subsequent event.
- 2. Attend any relevant workshops and conferences (if time allows, this can be executed during the last day, otherwise, it can shift to a post-event presentation)
 - a. Member states who are more advanced in the Once-Only Technical System implementation and/or their experts are invited to share their knowledge, solution and technology used.
 - b. The organising team can create ad-hoc workshops or explanatory sessions if there is a need to do so. This could be because participants signalled this before the actual event or because the organising team or participants notice during the actual Projectathon that some topics require further clarification or discussion.

It is highly recommended to join at least one (the more the better) Projectathon events before going into production. It is the optimal way of getting assurance about your OOTS implementation.

The concept of being a remote observer does not work as effectively as being an on-site observer as there is a relatively high risk of issues on technical, connectivity and cooperation levels. This was a key lesson learned from the April 2023 Projectathon.

Join an event at the earliest opportunity, if things fail, they do so in a friendly test environment. This way, you will learn the lessons and be best placed to succeed at the next event. Moreover, the more tests you complete early on, the more complex scenarios you can conduct against more counterparties.

It will be a great opportunity for all teams to meet, interact and have fun.

10 Frequently Asked Questions

10.1 Will the event take place in an on-site, remote or hybrid format?

- It was the initial intention to plan for a full on-site event to ensure all teams can be in a single location, can fully focus on the event itself and can benefit from the possibility to talking in person to all other teams.
- After receiving initial Member State's feedback, the Commission shall organise this Projectathon event in a hybrid format. This means that:
 - o Member States can choose to send all their team(s) in person to the event.
 - Member States that do not send all their teams in person to the event, are expected to send a couple of coordinators that can attend this event in person (this is also a lesson learned from the 2023 Projectathons). Active participants should have at least one or two representatives / coordinators on-site. These coordinators should have a "direct line" to the Member State teams that are working remotely. The SUT operators are the participants having direct access to Gazelle, they can be onsite or offsite.
 - Member States that are not actively participating in tests but join as an observer are
 encouraged to send a couple of observers in person to the event to benefit from
 having a better overview of what is happening during the Projectathon event. For the
 October event, all Member States are expected to actively participate.
 - Acceptance or staging environments that run on dedicated servers or networks must be connected via the public internet to the Projectathon (instead of developers bringing these components on their PCs into the room, because they would have restricted access via the local network in the event location) if they are expected to be available during the event and if they pass pre-event connectivity checks.
 - Break-out rooms are made available on-site to facilitate ad-hoc discussions related to the development and testing of OOTS components.
- In case of an unexpected event (such as public health restrictions) causing travel disruption for all or some participants, the Commission will transform this event into a remote event with as minimal disruption as is feasibly possible.

10.2 How many teams can I send to the event per Member State?

You can send all Member States teams relevant for implementing the Once-Only Technical System at national or sub-national level. This means that relevant public or private organisations and their members can participate. In particular, since it's one of the main priorities of 2024 to engage Competent Authorities and more specifically the Evidence Providers to ensure that as many evidences as possible are available through the OOTS, it would be pertinent to bring Competent Authorities in the teams.

However, we expect that teams will coordinate with the National Coordinator to prevent any non-relevant team participation from happening and to have the National Coordinator keep an overview of the status of all relevant teams.

10.3 What are the requirements for the System Under Test (SUT) operator(s)?

- Generally, at least two System Under Test (SUT) operators are expected to participate for each SUT, you can send multiple teams if needed. For the 2024 events, all Member States are expected to actively participate, but individual members of the team can be observers.
- The SUT operators should be someone familiar with the SUT in question and the features to be tested. You are allowed to fix the issue, recompile, and retest as many times as necessary. Therefore, being able to change the code is recommended.
- The SUT operators should know how or where to obtain the system's logs for evidence sharing purposes during the test execution. Alternatively, they can be supported by other SUT operator(s) with technical skills to perform these tasks.
- Ideally at least one technical team member or developer to provide technical support on your SUT or fix the bug.
- All Systems Under Test (SUTs) are expected to be available online and capable to make/receive connections to/from other SUTs.

10.4 What is the estimated time required for each activity in the different phases of the Projectathon?

Table 5: Projectathon activities estimated time

About one person-day* which includes:

Registration

- Attending the Projectathon registration Webinar (+-one hour).
- Defining the features to be tested Registration in Gazelle.
- Administration and contract signing.
- Travel and accommodation booking (to be done by each team separately).

Pre-Projectathon

Preparatory Tests take around 10 person-days*. It highly depends on the test features and the complexity of the System Under Test.

Gazelle is open for Preparatory Test from 17 April to 10 May 2024. You can perform the Preparatory Test anytime during this period.

Connectivity Test (for onsite/online/hybrid participants a that are operating a System Under Test) take about 1 person-day*.

Gazelle is open for Connectivity Test from 20 April to 10 May 2024. You can perform the Connectivity Test anytime during this period.

Onsite participant:

Projectathon days

Projectathon events (three person-days*) + min one person-day* for the travel (round-trip), hotel checkin/checkout.

Online/Hybrid participant:

Projectathon events (three person-days*)

No fees are charged to participate to the actual Projectathon event itself.

The Commission can cover the fee of travel costs of one public and one private sector expert per Member State. We kindly ask the National Administrations to cover the costs of additional participants. For the 2 thematic Projectathon events of 2024, reimbursement will include covering the travel costs of up to 4 participants in total per Member State (in accordance with the rules for reimbursement of experts attending meetings of the European Commission): up to 2 from the

^{*} For reference only

national team (as previously), and up to 2 Competent Authorities representatives, vouched by the National Coordinator.

10.5 What materials should I prepare for the Projectathon event?

- Laptop and device needed to:
 - Operate and debug the SUT.
 - o Communicate with your remote team and with other remote participants.
- All Systems Under Test (SUTs) are expected to be available online and capable to make/receive connections to/from other SUTs.
- International power adaptor (unless you use equipment that can fit in standard Belgian power sockets).
- Earphone with microphone (headset) for online communication purposes.

10.6 If I have problems or questions about the Projectathon where or who should I contact?

 You can send all your questions or requests for assistance to: EC-OOTS-SUPPORT@ec.europa.eu



Practical information

Table 6: Practical information – May 2024 OOTS Projectathon

| Location | Brussels |
|---------------|--|
| Date | 15 May - 17 May 2024 |
| Registration | Open 26 March 2024; Close 12 April 2024 |
| Target groups | All Member States teams relevant for implementing the Once-Only Technical System (to be coordinated with the National Coordinator). |
| Fees | No fees are charged to participate to the actual Projectathon event itself. |
| Accommodation | Any hotel reservation is the responsibility of the participants. Member State reimbursement is possible but limited up to one public and one private sector expert per Member State for the fee of travel costs. For the 2 thematic Projectathon events of 2024, reimbursement will include covering the travel costs of up to 4 participants in total per Member State (in accordance with the rules for reimbursement of experts attending meetings of the European Commission): up to 2 from the national team (as previously), and up to 2 Competent Authorities representatives, vouched by the National Coordinator. |



The Organising Team is committed to user privacy. The policy on protection of individuals regarding the processing of personal data is based on the Regulation (EU) 2016/679 on the protection of natural persons regarding the processing of personal data and on the free movement of such data (GDPR).

The processing of personal data by the European Union institutions is based on the Regulation (EU) 2018/1725 on the protection of personal data by the EU institutions, bodies, offices, and agencies (EUDPR).

In the context of the organisation and management of OOTS Projectathon activities, we will be processing your personal data for specific purposes.

The <u>OOTS Privacy Statement for Meetings and Events</u> explains the reason for the processing of your personal data, the way we collect and ensure protection of all personal data provided, how that information is used and what rights you have as a data subject. Please note that all Projectathon participants must accept to have read and understood the content of the relevant privacy statements during the registration process.

Please note that all personal data stored in the Gazelle platform (personal data processed for the purpose of creation of an account in the Gazelle platform and testing of peer-to-peer interoperability) will be kept only for the duration of the 2024 OOTS Projectathon series and will be deleted from the Gazelle platform by the data processor one month after the end of the year in which the 2024 Projectathon series ended (at the end of January 2025).

Annex 1: Gazelle Registration Manual 1 Gazelle Test Management

The Gazelle Test Management Application gathers information needed for an organization to participate in an upcoming testing session. In the OOTS Projectathon, an "Organization" in Gazelle corresponds to a Member State.

To successfully register for a testing session, an organization must provide the following information:

- User account(s) in Gazelle
- Organization details
- Contact persons in your organization (optional)
- System information the profiles/actors/options that you will test during the event

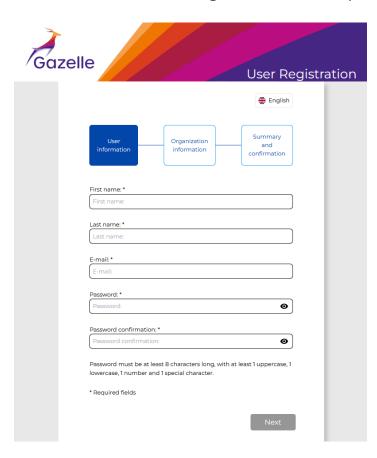
Note that for the May 2024 Projectathon, you will have to recreate your account for the 2024 Projectathon series. This is because data has been anonymised in Gazelle. In case you need test related data for archiving or auditing purposes, don't forget to archive your data in Gazelle at the end of the year since data will be again anonymised and will be deleted one month after the end of the year (around end of January 2025)

2 User sign-up

1. Click on the "Sign up" on the Gazelle Test Management homepage.



2. You will be redirect to User Registration form. Fill up the user information and click the "Next" button.



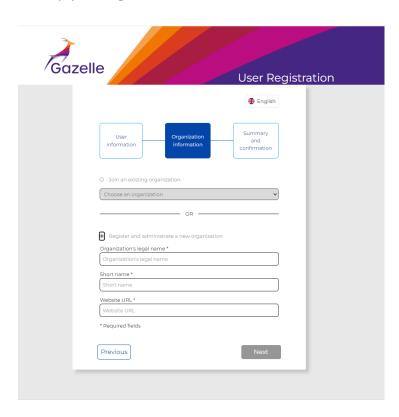
3. On the Organization Information form, you have 2 options:

Option 1: Join an existing organization.

Select your organization if your organization has been created/registered in Gazelle. And then click the "Next" button.

Option 2: Register and administrate a new organization.

Fill up your organization information and click the "Next" button.

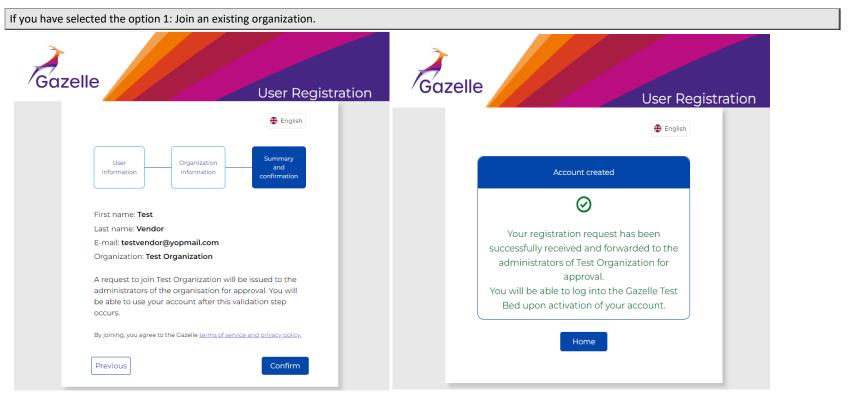


Tips

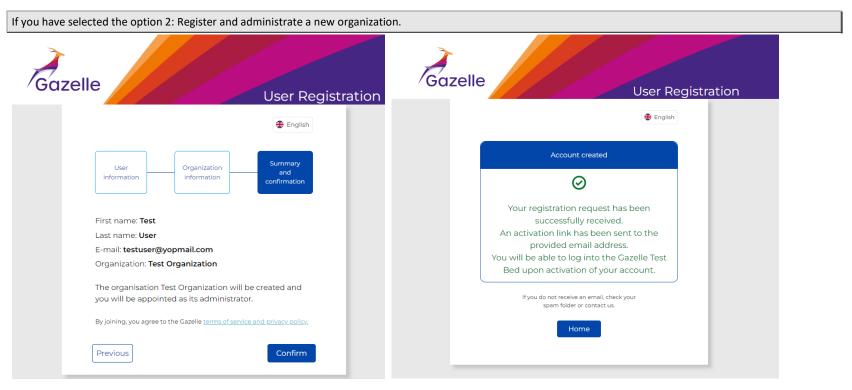


It is important to enter your country's 2-Alpha code as prefix of your organization "Short name". Example: FR_ORG for France. The user who creates the new organization is automatically assigned the Vendor Administrator role. The vendor administrator is responsible for activating users in their organization and managing information of the organization, users and SUT(s) of the organization.

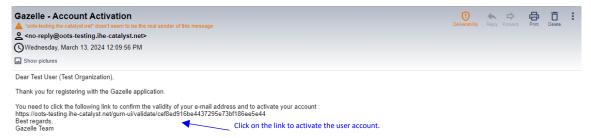
4. On the Summary and Confirmation page, review your information, click on the "terms of service and privacy policy" url to read the content. By clicking on the "Confirm" button, you accept the terms of use.



An email will be sent to the vendor admin of your organization for activation. Once your user account is activated by the vendor admin, you can login to the Gazelle with your email address and password.



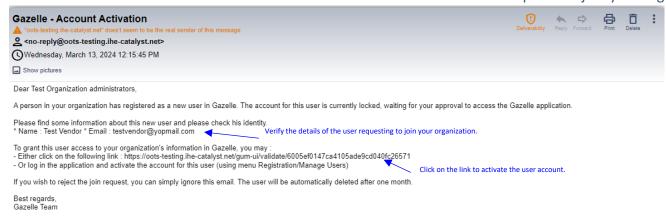
- i) You will receive an email to activate your account.
- ii) Click on the link to activate the user account.



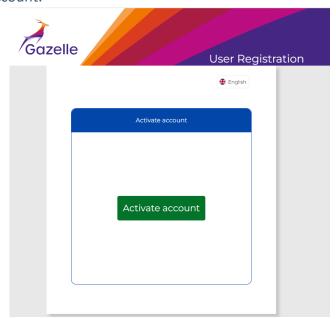
iii) You will be redirected to Gazelle Activate account page, click on the "Activate account" button. Once your account is activated, you can login to Gazelle with your email address and password.



As a vendor admin, you have the responsibility to verify the users register under your organization and activate their user account. You will receive an email as below with the details of the user who requests to join your organization:



Click on the link, you will be redirected to Gazelle Activate account page. Click on the "Activate account" button to activate the user account.



3 Vendor and vendor Admin roles

There are two levels of users in Gazelle Test Management:

| Vendor admin role | Vendor role | | |
|--|--|--|--|
| Approve, maintain users' account | Maintain own user profile in user preference | | |
| Maintain Organization information | Add and maintain System Under Test (SUT) | | |
| Maintain Organization contact | | | |
| Add and maintain System Under Test (SUT) | | | |
| Update System Under Test (SUT) Registration Status | | | |

4 Login

1. On the Gazelle Test Management homepage, click on the "Login".



2. Login to the Gazelle TM with your email address and password.



5 Forgot Password

1. Forgot password: On the login page, click on the "Forgot Password?" link.



2. To re-set password, you can use the "Forgot Password?" on the login page as explain above or go to the top right of the Main menu, click on your first name/last name and select "Preferences".



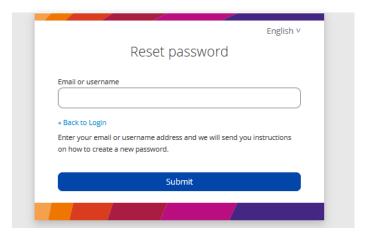
You will be redirected to the User Preferences page, click on the "Reset password" button.

User Preferences

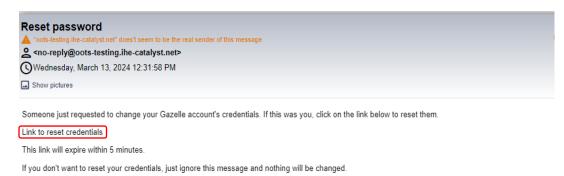


3. Enter your email address and click "Submit".



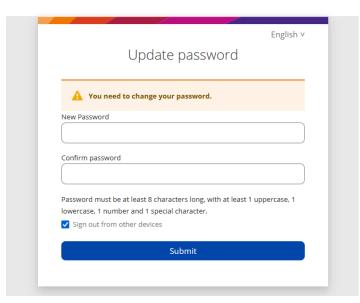


4. You will receive an email as below. Click on the link to reset credentials.

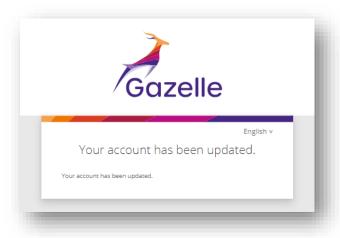


5. Enter your new password and click "Submit".



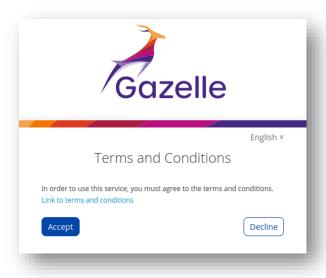


5. You can now login with the new password.



6 User Consent

If there is an update on the terms and conditions, user consent will be requested. Once accepting the terms and conditions, you will be able to login to Gazelle. Click on the links to read the terms and conditions.



7 Verify current connected Test Session

It is particularly important to verify which test session you are currently connected to.



1. To switch the test session, click on the "Join another session" button.

If the "Join another session" button appears in blue, this means that you are connected to the current testing session.



If the "Join another session" button appears in orange this means you are in a past test session.



2. Make sure to select the correct test session for example "OOTS Projectathon April 2023". Confirm by clicking on the blue tick and clicking on the "Close" button.

Please select one testing session. This will set context and only display systems, data and results relevant to that session.

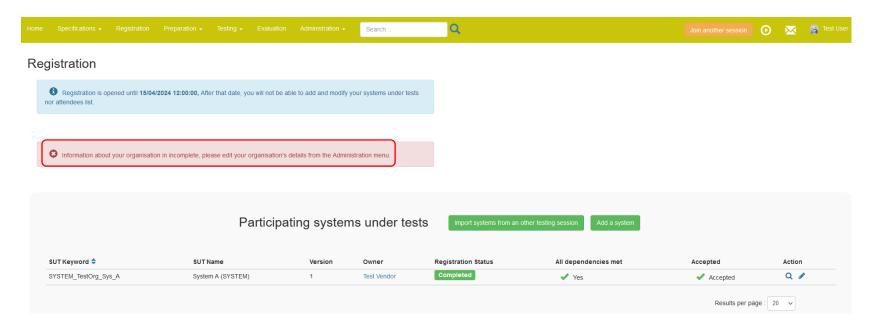


3. Back to Gazelle TM, you are now connected to the correct test session.



8 Add a contact to the organization

On the Menu-> Registration page, you may see a reminder your organization's details are incomplete. This reminder is to remind the vendor admin to enter the contact of the organization. Given that OOTS Projectathon is a non-payment event, you can ignore this reminder as the contact of the organization is mandatory only for the event that requires payment. If you do not like to see the alert on the page, you can follow the next step to fill up your contact information.



A "Contact" is a person in your organization who will interact with us in preparation for a testing session:

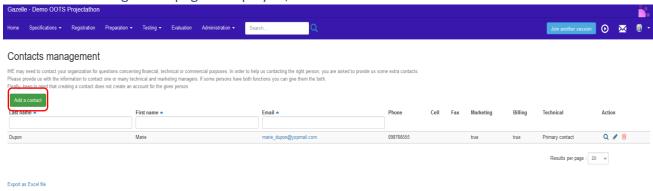
- Financial Contact (only 1)
- Marketing Contact (1 or more)
- Technical Contact (1 or more)

A user may, or may not, be a contact.

1. Go to the top menu Administration Manage -> Contacts



2. Contact Management page is displayed, click on the "Add a contact" button.

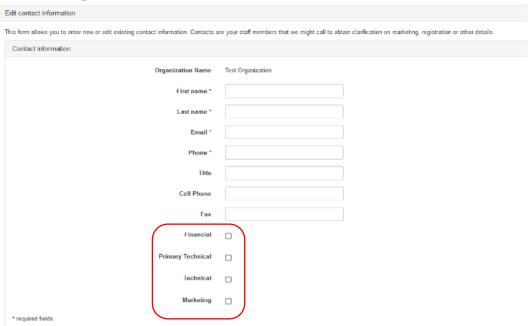


3. Fill up the contact details. One person might serve multiple Professional functions.

To finalise your organization registration, you need at least one contact for the financial, technical and marketing function.

Tips: You may register only one main contact person and select all the mandatory "Professional functions" options: Financial, Marketing, Primary Technical and Technical as below.

Contacts management



9 How to register system under test (SUT) in Gazelle

1. On the Gazelle main page, click on the "Add a SUT" button



2. Enter the details of your SUT and click on "Save" button.

The system under test (SUT) can be a released product, a product under development, or even a prototype.

The keyword of a SUT should include the country code.

The owner is the person who is responsible for the system, a main contact to answer technical details of the SUT, and acts as a main contact point of the test partner during the Projectathon.



Tips

If you cannot find the System type that suits your SUT, please select "OTHER".

System creation

Add a system



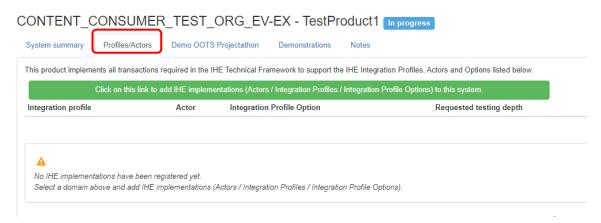
3. Once the system is created, the "System edition" page is displayed.

Click on the "Profile/Actors" tab to select the Profile/Actor/Option combination you would like to test during the Projectathon. You can refer to the modelisation guide below to identify what suits your system, and to the Playbook Appendix about Gazelle SUT capabilities for more detailed information.

Once-Only Technical System Projectathon – Participant Playbook (v4.0) – Annex 1: Gazelle registration Manual

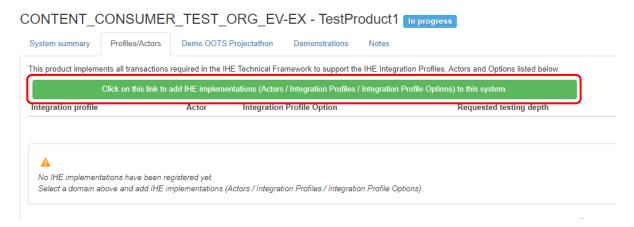
| Profile | Actor | Option | Note |
|--------------------------------|----------------------------------|--|--|
| | | PERSON TYPE - natural persons | multiple options possible |
| | | PERSON TYPE - legal persons | multiple options possible |
| eIDAS Profile | ID Requester | CUSTOM EP SCHEME - custom EP scheme | the name will have to be provided |
| eIDAS Profile | | IDENTITY DATA SUPPORT - dynamic elDAS transactions | multiple options possible |
| | | IDENTITY DATA SUPPORT - static (pre-agreed) data | multiple options possible |
| | eIDAS Node | | |
| | | BUSINESS RULES CHECKS - single file validation | multiple options possible |
| | | BUSINESS RULES CHECKS - cross-validation | multiple options possible |
| | | AUTOMATION LEVEL - automated | 1 option possible |
| | | AUTOMATION LEVEL - semi-automated | 1 option possible |
| | | AUTOMATION LEVEL - manual | 1 option possible |
| | Data Service Directory | | |
| | Evidence Broker | | |
| | | PROCEDURE PORTAL - real procedure portal | |
| | | PROCEDURE PORTAL - simulated procedure portal | |
| ! | Evidence Requester | DOMAIN - civil status | which Competent Authorities or domains it represents - multiple options possible |
| | | DOMAIN - education | which Competent Authorities or domains it represents - multiple options possible |
| | | AUTOMATION LEVEL - automated | one option possible |
| | | AUTOMATION LEVEL - semi-automated | one option possible |
| OOTS Evidence Exchange Profile | | AUTOMATION LEVEL - manual | one option possible |
| | | BUSINESS RULES CHECKS - single file only | multiple options possible |
| | | BUSINESS RULES CHECKS - single cross-validation | multiple options possible |
| | Data Service (Evidence Provider) | DATA SOURCE - real data source | one option possible |
| | | DATA SOURCE - simulated data source | one option possible |
| | | DOMAIN - civil status | which Competent Authorities or domains it represents - multiple options possible |
| | | DOMAIN - education | which Competent Authorities or domains it represents - multiple options possible |
| | | AUTOMATION LEVEL - automated | one option possible |
| | | AUTOMATION LEVEL - semi-automated | one option possible |
| | | AUTOMATION LEVEL - manual | one option possible |
| | | BUSINESS RULES CHECKS - single file only | multiple options possible |
| | | BUSINESS RULES CHECKS - single cross-validation | multiple options possible |
| | | PREVIEW SPACE - pdf preview | multiple options possible |
| | | PREVIEW SPACE - unstructered preview | multiple options possible |
| Metadata Management Profile | | AUTOMATION LEVEL - automated | one option possible |
| | LCM Metadata Updater | AUTOMATION LEVEL - semi-automated | one option possible |
| | | AUTOMATION LEVEL - manual | one option possible |
| | LCM Metadate Registry | | |

System edition

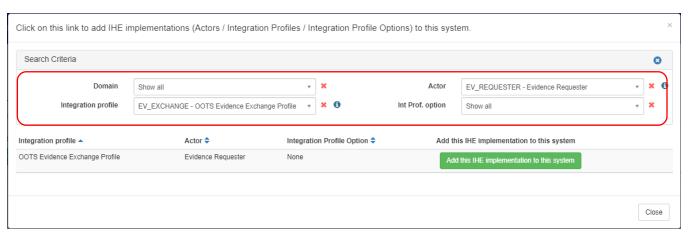


4. Click on the green button.

System edition

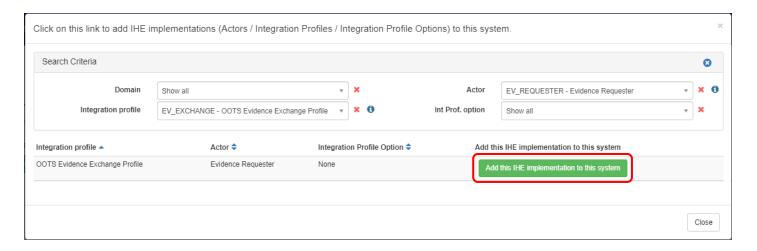


5. A pop-up page is displayed with the list of Profile/Actor available for the test session. You can use the search criteria to filter your search.



6. Click on the green button to add the relevant Profile/Actor into the system.

To exit the pop-up, click the "Close" button.



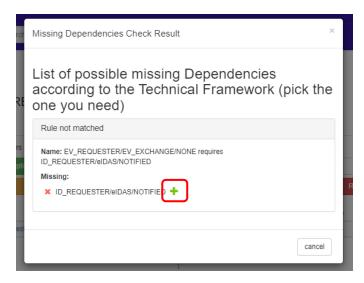
7. If the orange button "Missing Dependencies check results" appear, it means that one or several of the combinations you have chosen have actor grouping requirements that are not fulfilled by the list of combinations you have selected.

Click on the orange button.



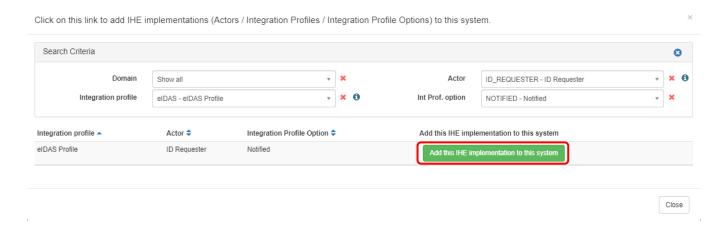
8. Add the dependence Profile/actor/option by clicking the "+" button.

For each rule implemented in the tool, you will see the content of the rule and a list of combinations you shall choose from to complete your registration.

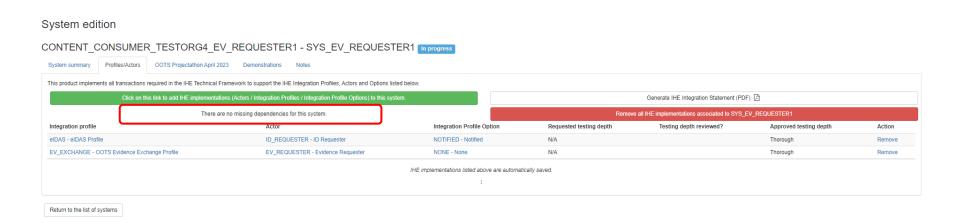


9. A pop-up page is displayed with the selected dependencies profile/actor/option.

Click on the "Add this IHE implementation to this system" button to add the relevant Profile/Actor to the system.



Repeat steps 8 and 9 until the orange button disappears.



10. Once you have filled up all the information of your SUT.

Go to the "System summary" tab and update the "Registration status" of your SUT to "Completed."

And click the "Update" button.

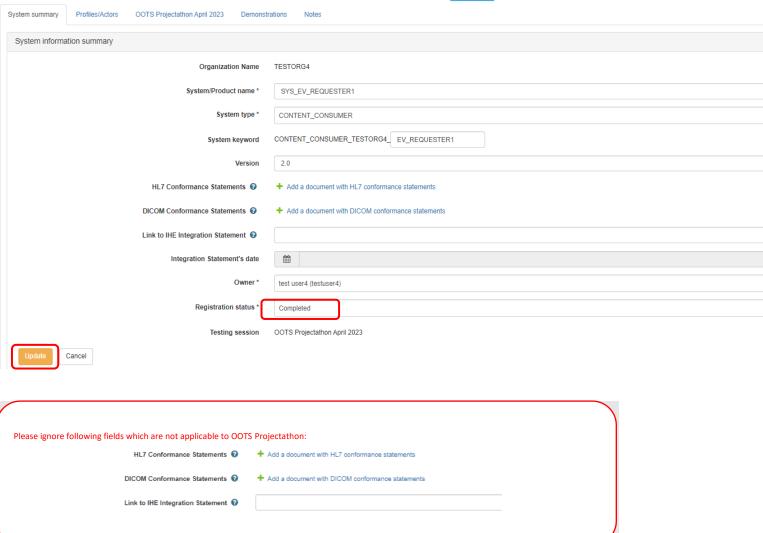


Notes

Only the vendor admin has the right to update the "Registration status" of your SUT.

System edition

CONTENT_CONSUMER_TESTORG4_EV_REQUESTER1 - SYS_EV_REQUESTER1 In progress



11. Your newly added SUT is in the "Participating system under tests" list.

Once your SUT is accepted by the technical manager, the status of the "Accepted" field will be updated to "Accepted".



10 VAT and billing information

This is a non-payment event, please ignore the VAT information and billing information section in Administration -> Organization's information:

| Billing address | | | | | | |
|---|--|---|----------|------------------------------------|---|---|
| This form allows you to enter new or edit financial Contact in this section is not active user and have It is allowed that a person listed below as a financi | no login rights. To create a login account, sele | of your staff members that might receive all billing mails and financial calls from I cot "Manage Users" under Registration. | HE. | | | |
| Contact | | | | Contact addresses | | |
| | | | | ID Address | 1 4 r Háláine Boucher | Solvet 🖊 🔋 |
| First name * | Fanny | | | City State | Thorigné Foullard Britany 3025 | |
| Last name * | SERRE | | | Zip Code Country | FRANCE | |
| Email * | fanny.serre@kereval.com | | | | | |
| Phone * | 02 23 20 36 64 | | | | | |
| Title | Project Manager | | / | Billing preview | WAS | |
| Cell Phone | | | | The preview below shows the | billing header that will be sent to the financial contact. Please make sure that your demographics are written correctly. | |
| Fax | | | | t | | |
| | | | | İHE | | Kereval To the attention of Fanny SERRE |
| ID 1 Address 4 r Hérène B City Thorigné Fou State Britany Zip Code 35236 Country FRANCE | illard | | Selected | Invoice Purchase order number : | — invoice confert | to the section of a largy server. 4 Helikine Bourber Thorigina Faultane Survey FIGANCE |
| Purchase Order | | | | | | |
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| VAT number Check validity of VAT number | . • | | | | | |
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