BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024

The Hub

1/30

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
2/30

The Hub

1.   Welcome to the Hub

The BioPhorum Hub is our member collaboration service which allows you to access and edit a range of content in the context of the Teams and Phorums you're engaged in.

The Hub is organised to reflect the structure of BioPhorum's collaboration. From the home page, you will have access to Phorums and, in turn, Teams and Subteams. The specific Phorums, Teams and Subteams you have access to will be based on both which Teams you're a member of as well as which Phorums your Organisation has membership to.

The Hub is built on Microsoft SharePoint which will be familiar to many of our members. This means that we are able to collaborate on documents in real-time using The Hub.

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
3/30

The Hub

2.   The Hub welcome video

We have a welcome video which introduces The Hub. Click here to watch it. You can open this without being signed into any particular website / service.

3.   Navigating around The Hub

One of most significant ambitions is that navigating The Hub is intuitive. We have introduced a number of features to achieve this.

4.   On The Hub home page

(1) Breadcrumb: In the green at the top of the site is a breadcrumb, this will update as you navigate between Phorums / Teams / Subteams. Each title in the breadcrumb is clickable so you can use it to navigate back to The Hub home page or the Phorum / Team / Subteam page.

(2) Personalised navigation (My Phorums / My Teams / My Subteams): This navigation appears throughout the site and will be specific to your engagement with BioPhorum. Phorums, Teams and Subteams that you are a part of will appear in the dropdown menus.

(3) My Teams & Subteams: this shows a list of Teams and Subteams that you are a member of. The key icon indicates that you can click on these to open the relevant Team / Subteam.

(4) Phorum navigator (All Phorums withinn BioPhorum): this shows a list of all Phorums. The key icon indicates that you can open a Phorum page, this will be the case if your company has a membership to the Phorum. The padlock icon indicates that you do not have access to the Phorum page.

5.   On a Phorum page

(1) Breadcrumb: In the green at the top of the site is a breadcrumb, this will update as you navigate between Phorums / Teams / Subteams. Each title in the breadcrumb is clickable so you can use it to navigate back to The Hub home page or the Phorum / Team / Subteam page.

(2) Personalised navigation (My Phorums / My Teams / My Subteams): This navigation appears throughout the site and will be specific to your engagement with BioPhorum. Phorums, Teams and Subteams that you are a part of will appear in the dropdown menus.

(3) Phorum navigator (Team & Subteams within
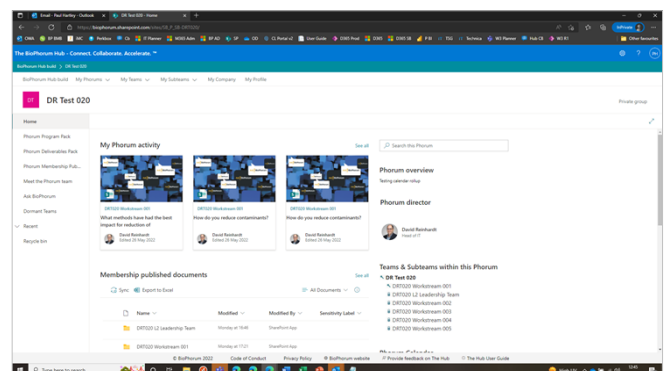
this Phorum): this shows a list of all Teams and Subteams within this Phorum. The key icon indicates that you can open a Team page, this will be the case if you are a a member of the Team. The padlock icon indicates that you do not have access to the Team page.
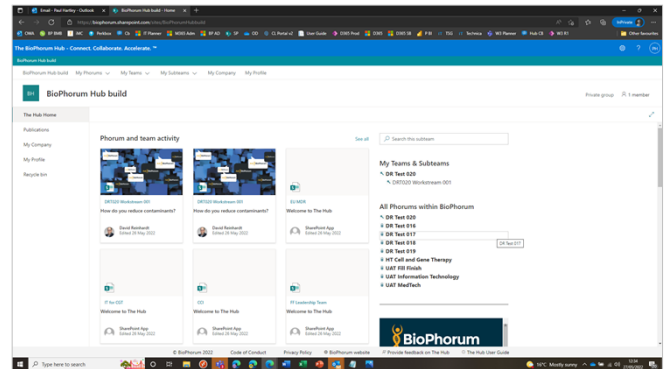
6.   On a Team page

(1) Breadcrumb: In the green at the top of the site is a breadcrumb, this will update as you navigate between Phorums / Teams / Subteams. Each title in the breadcrumb is clickable so you can use it to navigate back to The Hub home page or the Phorum / Team / Subteam page.

(2) Personalised navigation (My Phorums / My Teams / My Subteams): This navigation appears throughout the site and will be specific to your engagement with BioPhorum. Phorums, Teams and Subteams that you are a part of will appear in the dropdown menus.
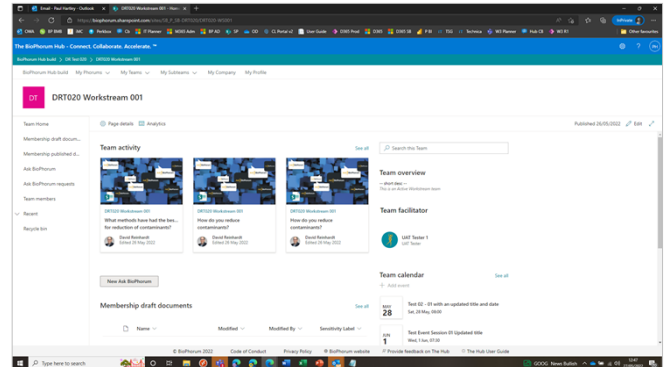
7.   Accessing The Hub for the first time

When your Facilitator completes the Onboarding process on BioPhorum's system, you will be sent a welcome email. This email contains all the links you need to access The Hub.
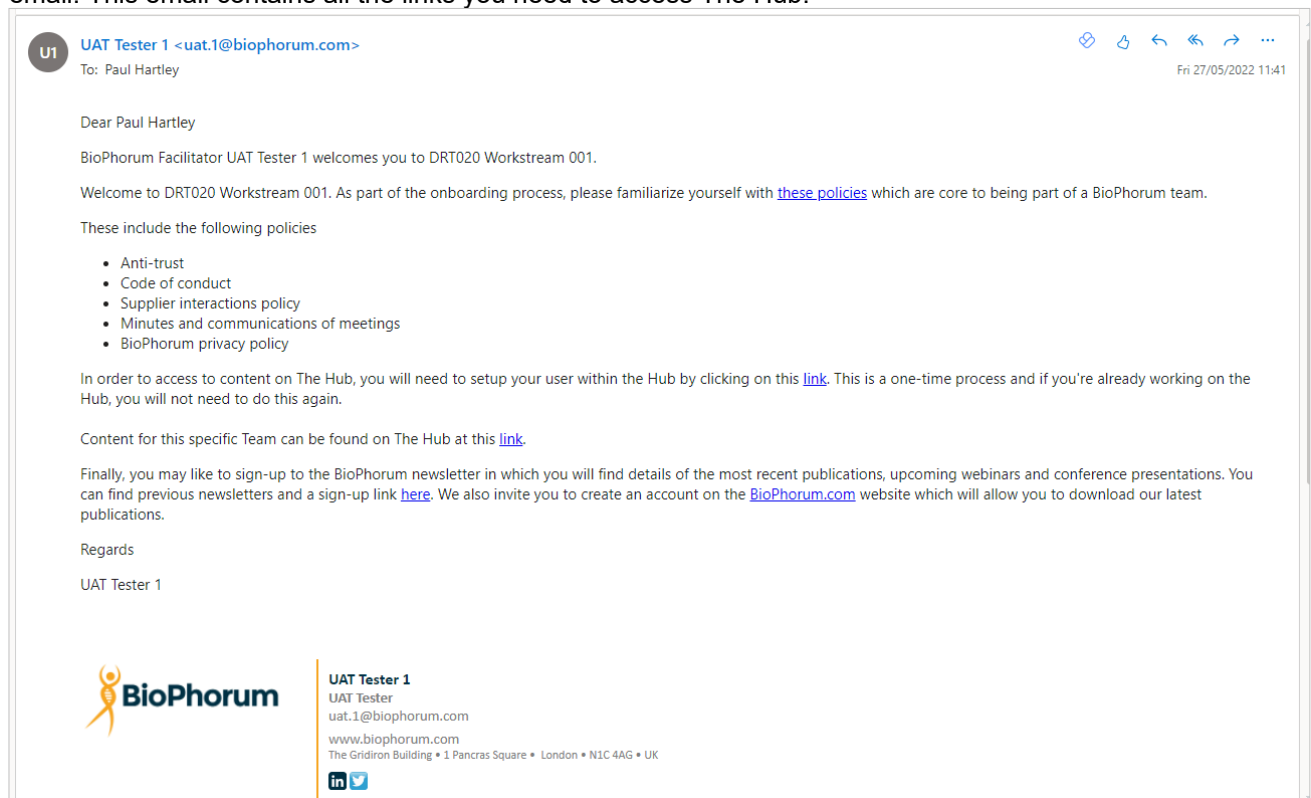
8. Accessing The Hub for the first time (Microsoft)

The first time you access The Hub, you need to click on a link which will enable you to accept BioPhorum's privacy policy.

If your Organisation uses Microsoft, this will also setup a trust relationship between BioPhorum and your Organisation and you will not need to create a password to access the Hub.

If your Organisation does not use Microsoft, you will be asked to create a password to access The Hub.

This link is known as a "Redeem URL". If you cannot find your welcome email, your Facilitator can send you a copy of this link to click on.
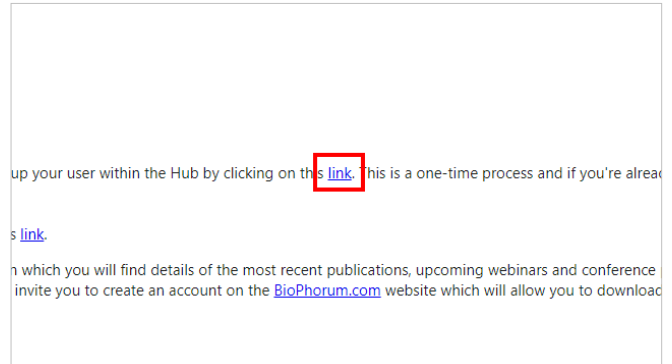
Review Permissions
You will be asked to review BioPhorum's privacy policy. If you wish to read this, there is a link on the page which will open the privacy policy.
Click Accept to continue
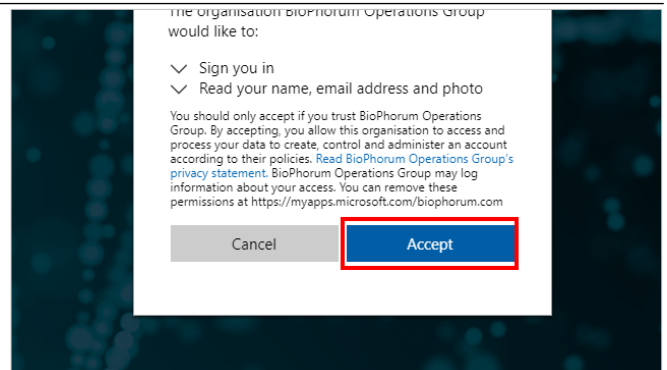
It may take a minute or two to process
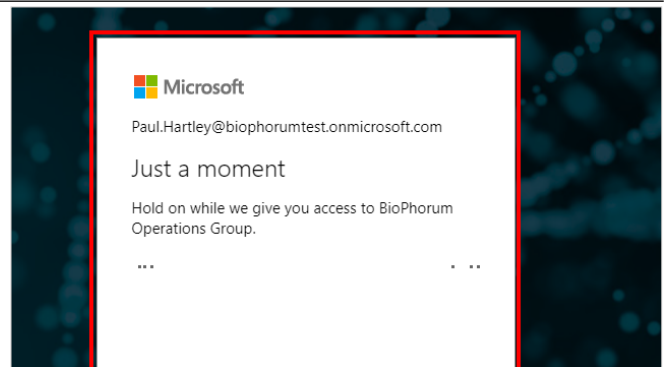
Once processing is complete, you will be taken to The Hub home page. We encourage you to bookmark this page in your browser.

9. Accessing the Hub for the first time (Non Microsoft)

The system will ask you to setup a username and password and accept the privacy policy.

10. Ongoing access to The Hub

Within the welcome email you will also find a link which will take you directly to Hub site for the Team you were onboarded to.

11. Troubleshooting access problems

If you see this error message, the most likely scenario is that you have not clicked the Redeem URL for the first time. Please see the steps above titled *Accessing The Hub for the first time*.

12. L2s on The Hub

If you are an L2 using The Hub, you will have some additional features accessible to you.

Firstly, you should note that your Phorum Leadership Team site on The Hub operates like any other Team site on The Hub. All the other features described in the User Guide will work for the Phorum Leadership Team site.

13. Access to all Teams within the Phorum

L2s are able to browse to any Team within the Phorum that they are an L2 for. They will be able to navigate to all Teams and Subteams from the Phorum site using the Phorum navigator.

14. Navigation as an L2

The personalised navigation (i.e. My Phorums / My Teams / My Subteams across the top of the site) will only

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
7/30

The Hub

show Teams that you are onboarded to. This will include the Phorum Leadership Team.

The Phorum navigator on the Phorum site will show all Teams within the Phorum. From here you can click on any Team to open its Hub site and view the activity feed and Membership draft documents.

Key icons for these Teams indicate that you have access to the Team sites.

Teams & Subteams within this Phorum

- **Tech Strategy**
  - Automated Bioreactor Proof of Concept
    - Raman patent review
  - Digital Technology Adoption
  - TS Leadership Team
    - TS Advisory Group
  - Aggregates RT-MALS Proof of Concept
    - BioSolve Modelling
  - Automated Material Transfer
  - Autonomous Bioprocess Control
  - Big Data to Smart Data

15. Ask BioPhorum as an L2

The Ask BioPhorum feature works for Reps onboarded to the Team site that you're looking at.
- When L2s are visiting Team sites for Teams within the Phorum that they are not onboarded to, the Ask BioPhorum feature will not work. If you wish to raise an Ask BioPhorum question for one of these Teams, please reach out to the Facilitator who will be able to help you.
- On the L2 / Leadership Team site, the Ask BioPhorum feature works as normal

16. The Phorum site

The activity feed on the Phorum site will rollup all activity from all Teams and Subteams on the Phorum. This enables you to have a sense of the breadth of activity on the Phorum.

17. Working with documents: Membership draft & Membership published

18. Documents on The Hub

Within The Hub, documents are stored in Document Libraries. In essence, a SharePoint Document Library is a document folder that has a set of permissions applied to it. These are regular SharePoint document libraries with all the features of a SharePoint document library, although noting that the permissions for the document libraries have been setup in accordance with the permissions model for The Hub.

Within the document library, you can create documents and/or upload documents you've been working on outside of The Hub.

19. Membership Draft and Membership Published documents

The Hub introduces a new concept for BioPhorum where we separate work-in-progress documents from completed documents and, in turn, we make completed documents available to anyone who has a Membership which would allow them to access that Team (even if they're not a member of the Team). Our intent is to create a way for Teams to make completed documents available to other Member Reps whose companies are members of the relevant Phorum(s).

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
8/30

The Hub

Membership draft
Membership draft documents are the working documents for each workstream. The could include all the day-to-day documents on a workstream: meeting agendas, meeting minutes, working notes, drafts of papers, etc.

Each Team and Subteam will have a Membership Drafts document library.

Membership published documents
Membership published documents are those which are complete and are to be made accessible to Team Reps who are not members of the specofic Team. These documents are made available to any Member Rep whose company has a Membership which includes the Team that generated the document.

Each Phorum will have a Membership Published document library created. When documents are "promoted" from Membership draft (in the Team/Subteam) to Membership published, a copy of that document is made in the relevant Membership published folder on the Phorum site.

The process of "promoting" a Membership draft document to Membership published is done by the Facilitator.

20.   Which documents are likely be Membership published?

The framework for consideration is whether the document contains content of sufficient interest/value that member companies not participating in the Team/Subteam would find benefit from access to it. In promoting a document to Membership published, the Facilitator is curating the document as having content of value outside of the working of the Team.

21.   Membership draft documents

From the Team/Subteam site, you can access the Membership draft document library from the left hand navigation.

Documents within this library will have the Sensitivity Label of "Membership draft" applied when created/uploaded.
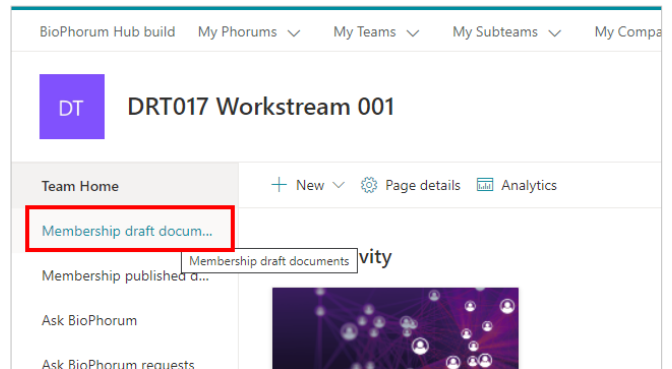
Use the **+ New** button to create a new document.

If you use the button from within SharePoint, the blank document is likely to open using the MS Office browser application. You can switch over to the full Windows application in the normal way.

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
9/30
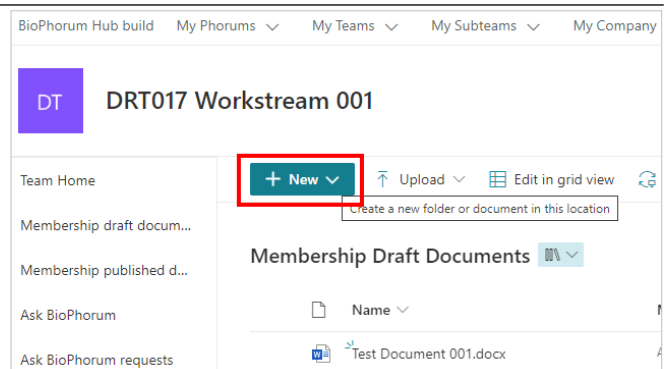
The Hub

Use the **Upload** button to upload files or a complete folder.

The copy on The Hub should be the master copy of any working document. If you are uploading a document from your computer, bear in mind that you should archive your computer's copy.
Note: Team Reps do not have the ability to change the file name (title) of a document once it is uploaded or created on the site. This is a SharePoint constraint. If you need to change the filename of a document, please ask your Facilitator.
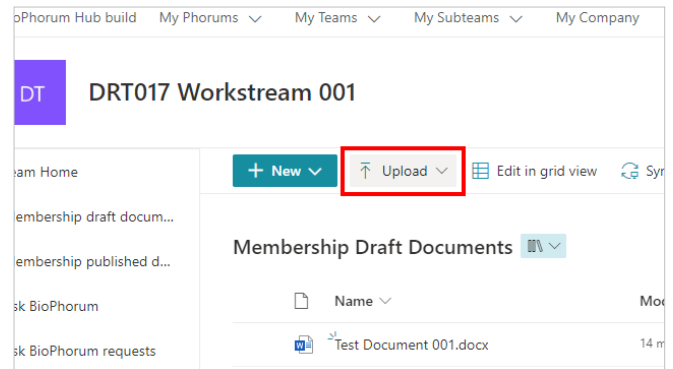
22. Membership published documents

Membership published documents are stored in a Membership published document folder on the Phorum site. Within the Membership published document library, there will be a sub-folder for each Team.

Team Reps whose company has a qualifying product will have access to the Phorum site and can see the MP folders without needing to access the individual team/subteam sites.

23. Who can see Membership published documents?

MP documents can be seen by anyone who is a Team Rep for a Company that has Products which include the Team that has MP the document. The Team Rep does not need to be part of the Team that MP the document, they just need to have access to a Membership which includes that Team.

For example, someone who is a Team Rep on CGT team for a company that also has a DG membership will be able to see all the MP docs for the DG teams included in the DG membership.

24. How are Membership Published docs displayed and stored?

Membership published documents are made available to *any Team Rep whose company has a Membership which includes the Team that generated the document*.

This chapter details where how MP documents are shown on the Phorum sites.

25. How are Membership Published documents shown?

Within SharePoint document libraries you can specify a range of views of files based on different criteria. For The Hub we have specified a selection of views based on metadata associated with the files in The Hub.

26. Use of SharePoint metadata within Membership Published documents

- Within SharePoint, we specify a type of document and, associated to each type of document, are a selection of metadata fields
- Metadata fields allow us to capture information about the file. In turn these can be used to build views and can be used within SharePoint search to refine search queries
- Within The Hub, there is a document type called *BioPhorumMembershipPublishedDocs* used only in Membership Published document libraries

Metadata fields associated with the BioPhorumMembershipPublishedDocs document type

- Phorum
- Team
- Subteam
- Document Category
  - The options here are a centrally managed list which mirror the list on Dynamics
- Sensitivity Label (i.e. Membership Draft, Membership Published, etc.)
  - This is currently a regular metadata label in SharePoint. Since The Hub was built Microsoft have improved the built-in sensitivity label feature and this is an area being considered for future improvement

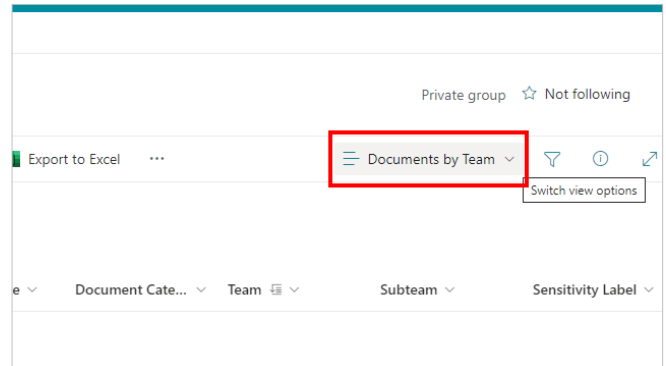# 27.   Views within the Membership Published document library

The name of the current view can be seen at the top right of the screen.

The default document library for Membership Published documents is Documents by Team.
- The use of metadata rather than folders means that only Teams who have documents published will appear, there will be no "empty folder" to browse into.

28.   Changing view within a document library

The name of the current view is shown at the top right. If you want to change this, click on the view name to select from the list of available views.

The list of views within the site

The standard views include
- Documents by Team (the default view)
- Documents by Category
- In Folders (shows documents in the folders that they are saved in)
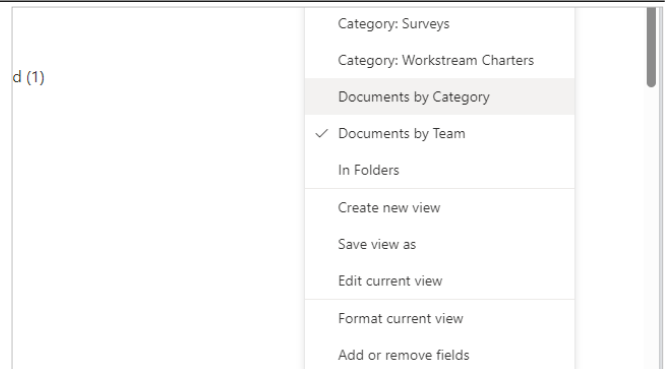
29.   How are Membership Published documents stored?

In SharePoint Documents are stored within document libraries. On every Phorum site there is a document library specifically setup for Membership Published documents.

- Within the MP document library there is a folder for each Team within the Phorum.
- Permissions are controlled for each Team's folder separately, as detailed below.
- Where Teams have Subteams, there is a folder for each Subteam within the relevant Team folder.
- When a document is Membership Published, a copy of the document is added to the relevant Team / Subteam folder within the Phorum's Membership Published document library.
- This document is also given metadata tags for the Phorum, Team and Subteam that the document was

BioPhorum Operations Group LTD

The Hub

reinhardtd@bioph
orum.com
November 13, 2024
11/30

generated from.

30. Permissions for Team folders within the Membership Published document library

The permissions setup for each Team's folder is specific to that Team. This enables us to include individual Teams into different Products over-and-above their "home Phorum" rather than constrained to a Product = a Phorum and all of its Teams, e.g. the Supply Resilience Memberships include all Teams on the Supply Resilience Phorum as well as some teams on the Drug Substance Phorum.

- Moving a file from a Subteam folder to it's Team folder will mean that anybody who has access to the parent Team can access the file. It is worth noting that this is the default permission within Subteams anyway, although on request Subteam access can be limited to Subteam members only.

31. Working with documents: SharePoint document features

# 32. SharePoint document library features

The Hub is built on SharePoint. This means that most of the regular SharePoint features for working with documents are accessible within The Hub.

This User Guide details some of the features which are more likely to be useful when working with BioPhorum.

33. Sharing document links

You may need to copy links to documents to include in emails and/or activity posts on The Hub.

Within the document library, click on the **Share** button for the relevant document
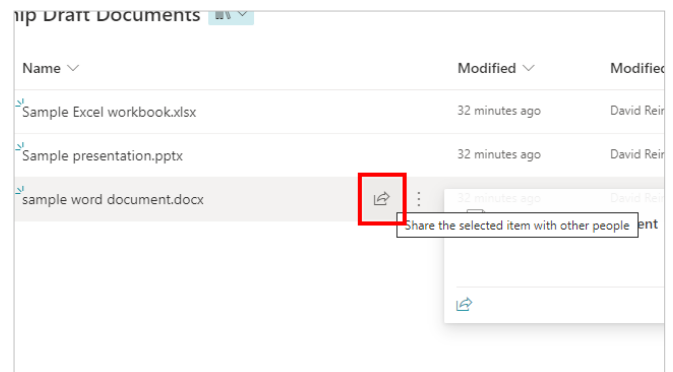
The permissions for the document should be set to **People with existing access**. This will mean that any onboarded Team Rep for this Team/Subteam will be able to access the document from the link. If this is not the current setting, click on the current setting to change it.
In this screenshot, it is currently set to "People in BioPhorum Operations Group with the link can view"
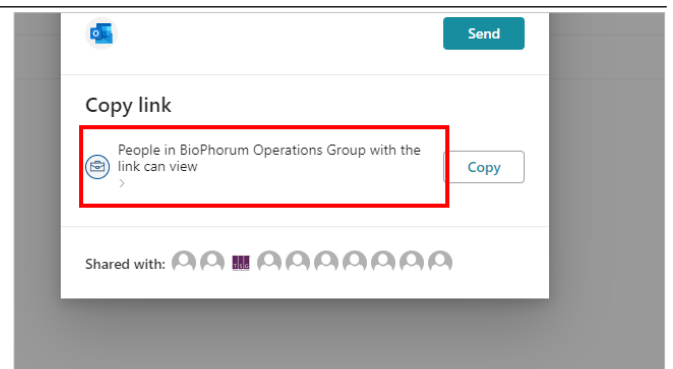
Select **People with existing access**

Click on the **Apply** button
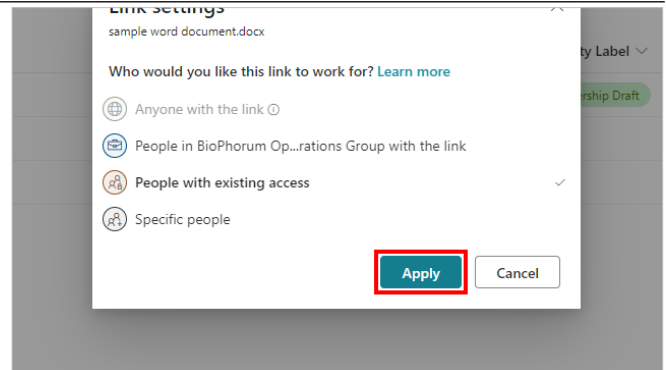
Click on the **Copy** button. This will copy the link to your clipboard and you can now paste it into wherever you want to use it.
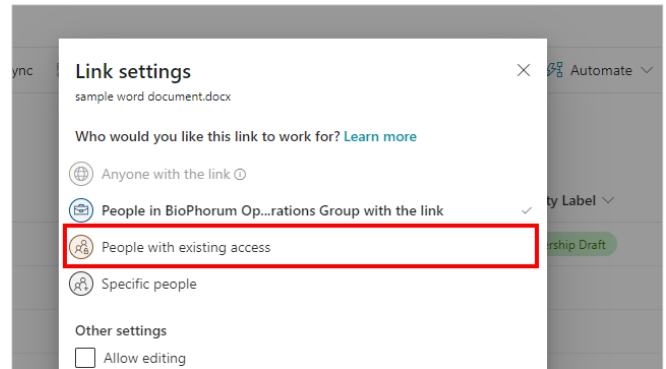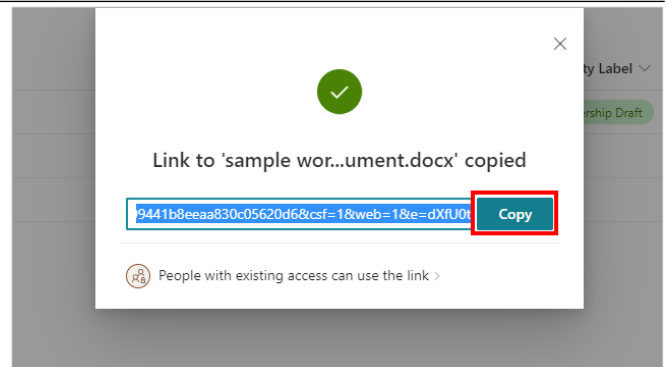

Click on the **X** button to close the share popup
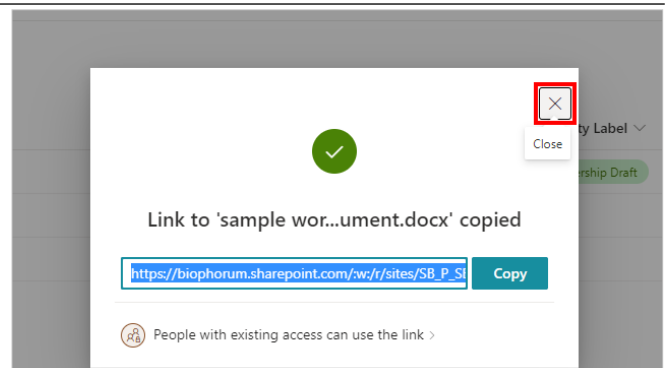
34. Sensitivity labels

Sensitivity labels allow us to specify who should be given access to a particular document, the range from "Public" (e.g. a publication) through to "BioPhorum restricted" (e.g. personnel files).

Within The Hub, some sensitivity labels are automatically set, notably Membership draft (any new document within a Membership draft library) and Membership published (any document that is promoted to Membership published using the feature described above).

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
13/30

The Hub

35. Raising a new Ask BioPhorum

The Ask BioPhorum feature allows you to ask questions of your contemporaries within your workstream or subteam.

Ask BioPhorum is a valuable tool, and we want to retain its value for all members. To do this we request that you discuss with your facilitator any question which refers to specific supplier's product or service before posting on Ask BioPhorum.

This is to ensure that the question is framed in an objective way which does not breach BioPhorum's policies and any agreement between your company and a supplier. This can be a complicated area requiring judgement and compromise. We want to post questions framed in the best way possible to get you the responses. If you have any questions, please do ask us.

Questions raised using this feature will appear on the Team / Subteam activity feed and other members of the Team / Subteam will be able to post comments as a reply.

Broadly speaking there are two options: (1) you can either raise a question directly or (2) request that a survey be setup.

36.   A question for comments

Click on the **New Ask BioPhorum** button to start the process
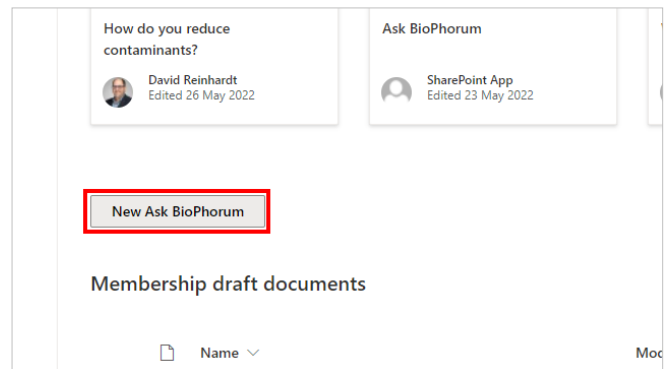
Select **A question for comments**.

This will take you to the next form where you can write your question.
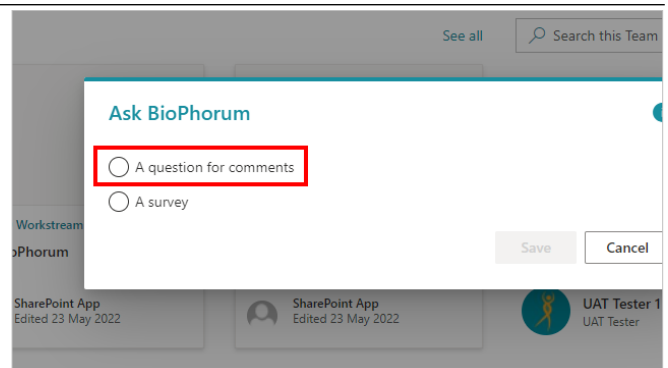
Post directly or send to facilitator?
You can choose to either post your question directly or send it to the facilitator.
- Posting directly will mean that when you click Save, an Ask BioPhorum page is created and is posted to the Team / Subteam activity stream
- Send to facilitator will mean that when you click Save, the Team / Subteam facilitator will receive a notification with the draft text you've captured. This can be useful if you want the facilitator to help draft a more impactful

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
14/30

The Hub
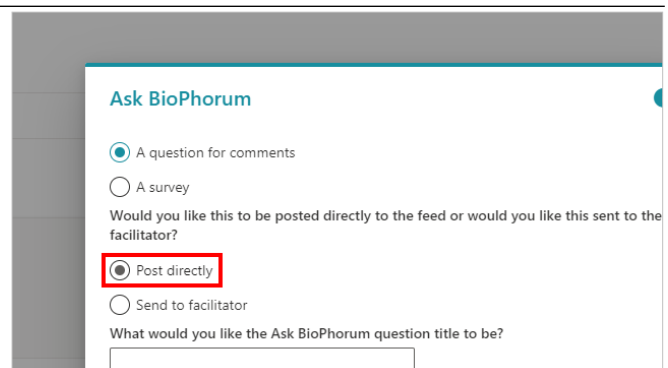
question or if you want the facilitator to post
the Ask BioPhorum question anonymously.
In this example, we will post directly.

Select **Post directly**

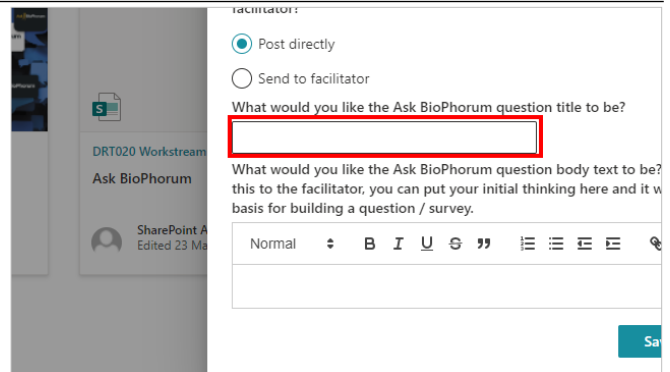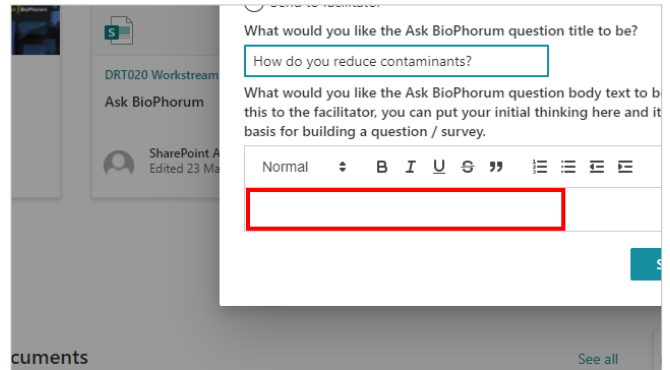|	
Click on the field **What would you like the Ask BioPhorum question title to be?** In this field you should enter the title of Ask BioPhorum question.	
Click on the field **What would you like the Ask BioPhorum question title to be?** In this field you should capture the body text of your question. You can use the various editing controls at the top of the input box to format your text. If you write multiple lines, the box will stretch so that you can see what you are writing. Due to a SharePoint bug, if you add any images into this text, they will not be saved. If you need to add images to your text, you will need to work with your Facilitator to do this.	
Once you are satisfied with your question title and question body text, you can save it. Click on the button **Save**	
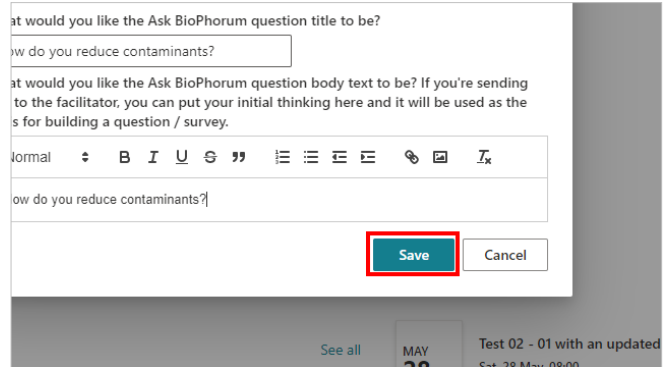
What happens when you click Save?
Post directly
If you selected "Post directly", you will be taken to your Ask BioPhorum page. It will also be posted in the Team / Subteam activity stream.

Your facilitator will be notified that you have raised an Ask BioPhorum and they may choose to send an email to the Team / Subteam to let them know.

Sometimes it can take a few minutes for the Ask BioPhorum to appear in the activity stream.
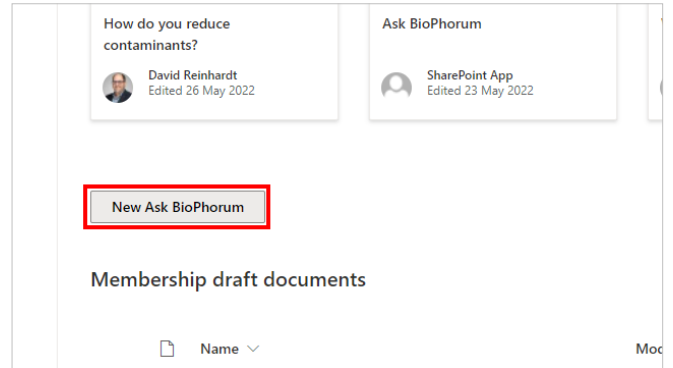
Send to facilitator
You will remain on the Team / Subteam page. Your facilitator will be notified that you have raised an Ask BioPhorum and they will reach out to you to discuss how to finalise the question. Once the question text is final, they will publish the question on your behalf.

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
15/30

The Hub

37. Surveys

If you want to raise a survey to gather quantitative data, you should select the survey option.

Your facilitator will help you shape the survey, they will create it using a survey tool and they will publish an Ask BioPhorum post with the link to the survey.

Click on the **New Ask BioPhorum** button to start the process

Click on the input field **What would you like the Ask BioPhorum question title to be?**

In this field you should enter the title of Ask BioPhorum question.
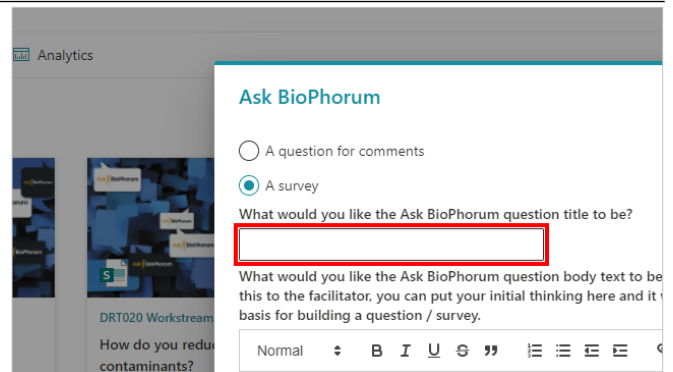
Click on the field **What would you like the Ask BioPhorum question title to be?**

In this field you should capture your notes about what you want the survey to be about. Give your facilitator as much guidance as possible to help them structure a sound survey.
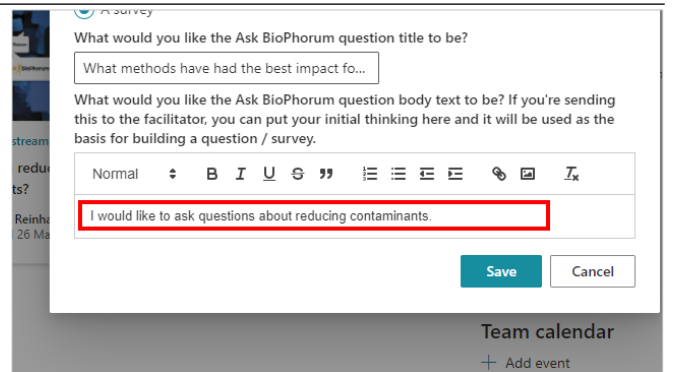
The screenshot below shows an example of an Ask BioPhorum question

Click on the **Save** button
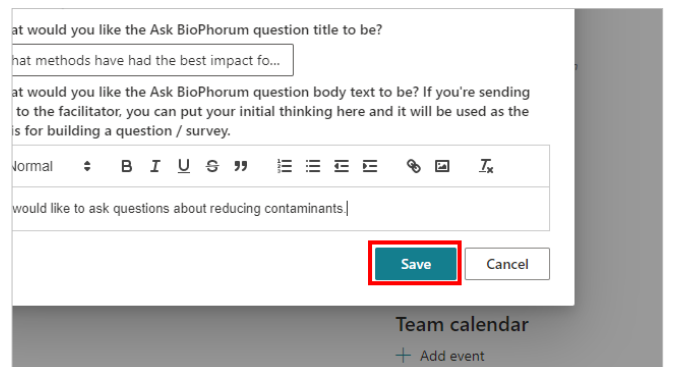
What happens when you click Save?
You will remain on the Team / Subteam page. Your facilitator will be notified that you have raised an Ask

BioPhorum Operations Group LTD

The Hub

reinhardtd@bioph
orum.com
November 13, 2024
16/30

BioPhorum and they will reach out to you to discuss how to finalise the survey. Once the survey is final, they will publish the question on your behalf.

38.   An Ask BioPhorum question

The Ask BioPhorum question page
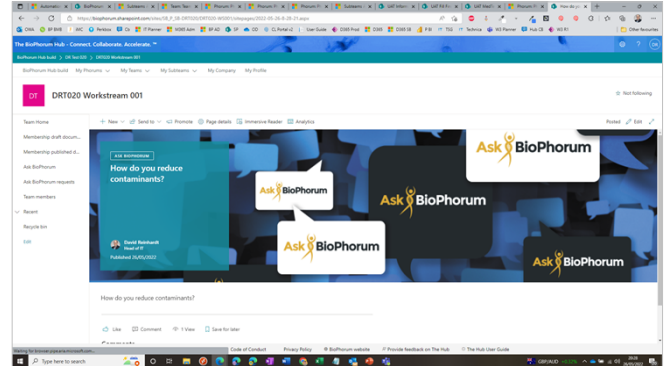
39.   Ask BioPhorum frequently asked questions (FAQ)

40.   How do I anonymously raise an Ask BioPhorum post?

In the Ask BioPhorum popup, choose "Send to Facilitator" and note in the description that you would like this post to be anonymous. The Facilitator will update the post to include their name as author.

41.   Commenting on Ask BioPhorum

From within the activity stream, click on the Ask BioPhorum post to open it
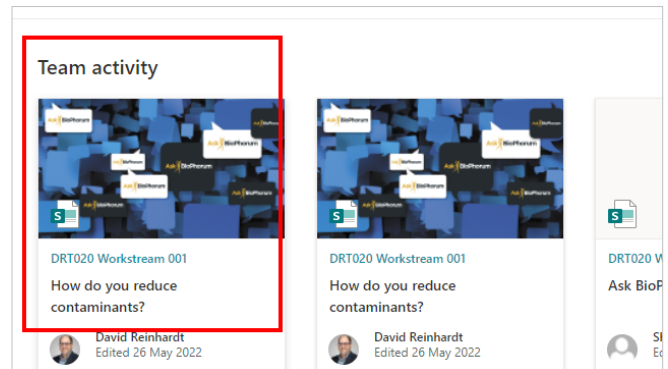
42.   Posting comments on an Ask BioPhorum

Scroll down to the bottom of the page to find the Comments section.

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
17/30
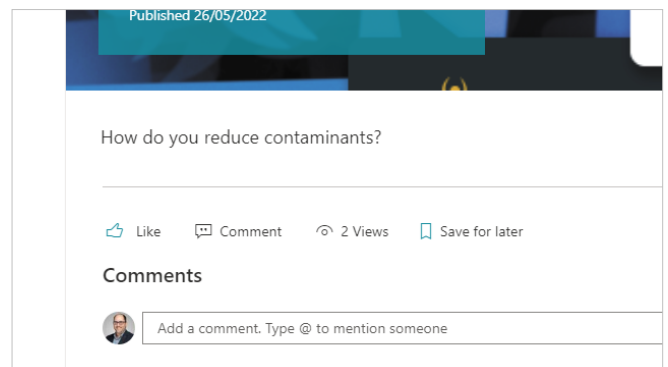
The Hub

Click in the comment box and capture your comment/reply.
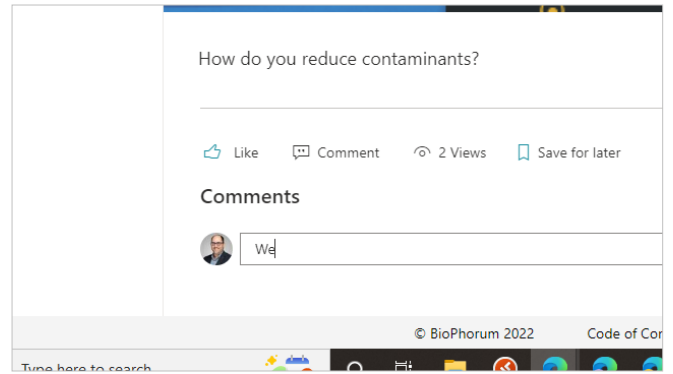
Click the **Post** button to post your comment. Your comment will appear immediately.
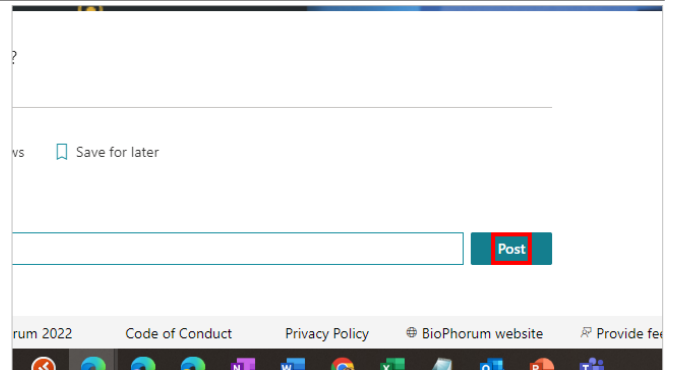
43. Replies to existing comments

You can continue the conversation either by adding a new comment or by replying to an existing comment. This instruction shows how to reply to an existing comment.

Click on **Reply**
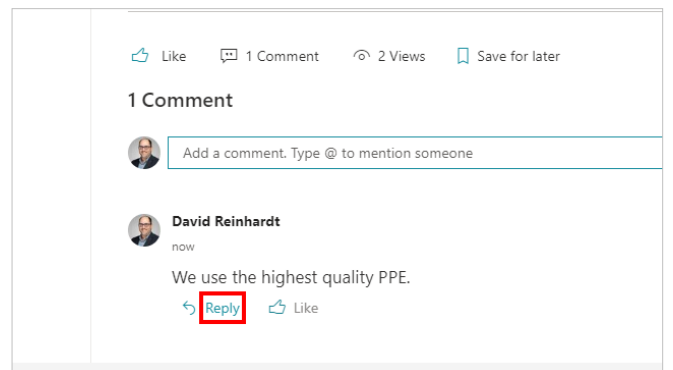
You will see that the reply comment is slightly indented below the original comment. Click in the comments box and type your reply.

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
18/30

The Hub

Click on the **Post button** to post your reply
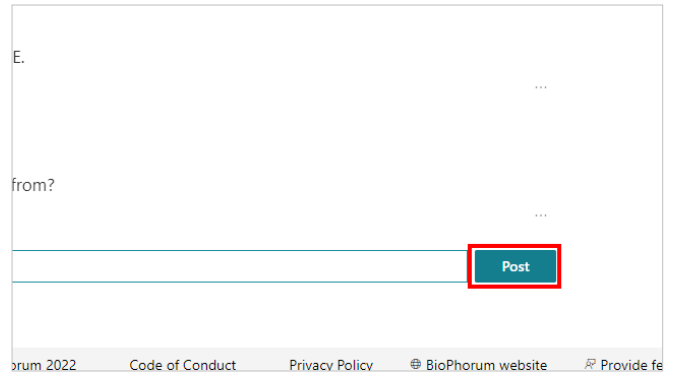
44. Publications report

Items flagged in BioPhorum's core system (Dynamics) as published will appear on the Publications list within The Hub.

If you there is a missing item, please reach out to your Facilitator / Account Manager to query it.

45. Accessing the Publications report

From The Hub home page (thehub.biophorum.com), click on **Publications**
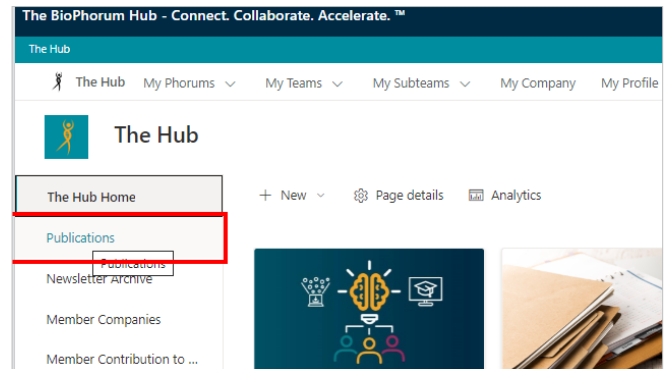
The Publications list

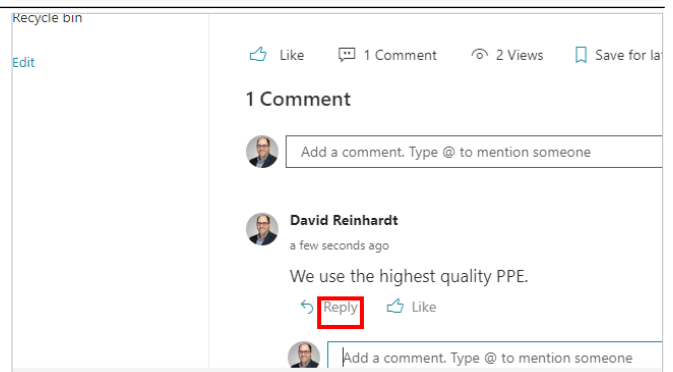- The external access link will open the Publication wherever it is hosted. Typically this is BioPhorum's website although not always. There should be no permissions requirement to access the link (i.e. it is not dependant on your Membership / Teams).
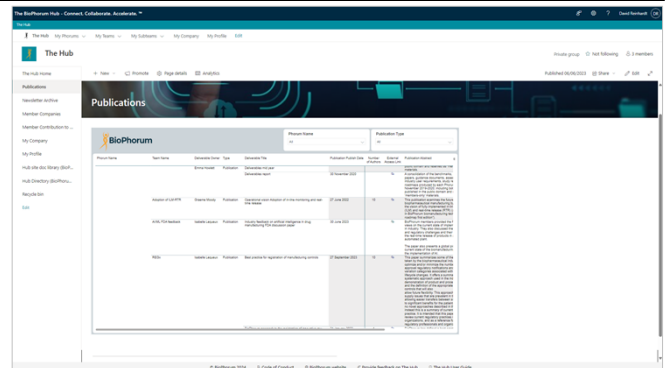
46. Member contribution to deliverables report

Member contributions detail where Member reps have contributed to published deliverables. This will only show deliverables which have been published and not those still in progress.

Permissions to open Membership published links

- Membership Published links will only work for you if your company has membership to a Phorum which includes the team that published the document. If you are taken to a "Request Permissions" page, use the External Access Link.

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
19/30

The Hub

47. Accessing the Member contributions to deliverables report

From The Hub home page (thehub.biophorum.com), click on **Member Contribution to Deliverables**
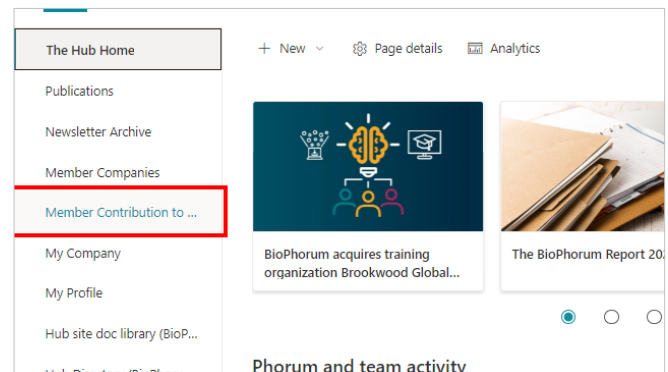
Member contribution to deliverables

- Use the filters on the report to filter by Phorum, Team or Team Rep (Contributor Name)
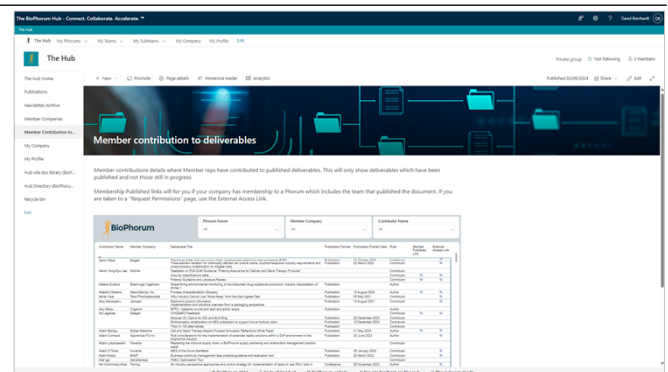
48. Deliverables and Deliverable Authors

49. Open a portfolio of work for the Phorum (the Phorum Deliverables list)

Within each Phorum, you can open a portfolio of Deliverables for the Phorum. Where available, this will also include links to the relevant versions of the documents.

From the Phorum site on The Hub, click on **Phorum Deliverables**

You will have access to a Phorum site if your company has a Membership which includes a Team on the specific Phorum. This could be a Membership to the Phorum, or a Membership which specifically includes one or more Teams on the Phorum.

50.   The Phorum Deliverables list

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
20/30
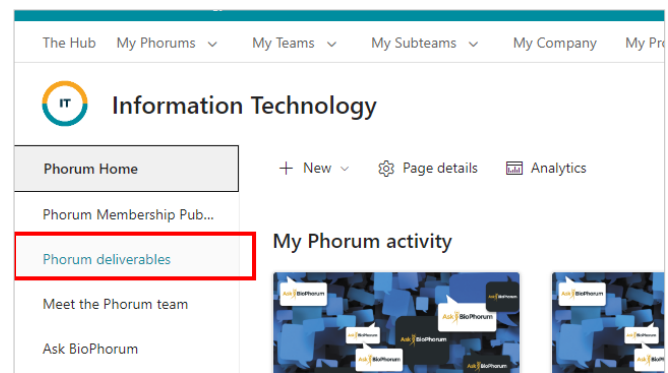
The Hub
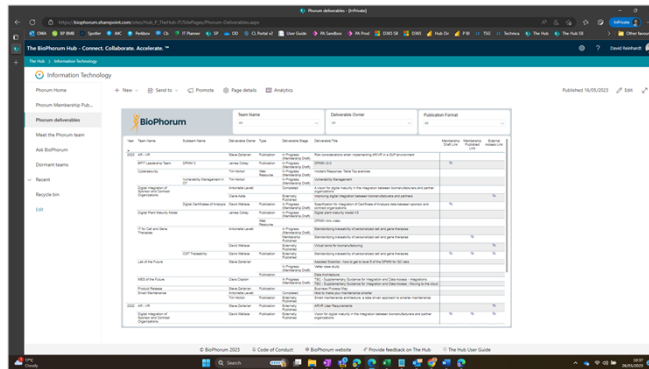
Links on the report

- The **Membership Draft link** will open the working copy of a Deliverable. You will only have access to this if you're a member of the relevant Team or an L2 within the Phorum
- The **Membership Published link** will open the Membership Published version of the Deliverable. You will have access to this if your Company has a Membership which includes the Team that produced the Deliverable.
- The **External Access link** will open to an externally published version of the Deliverable. This will only be populated for publications which have been externally published.

The principles of Membership Draft and Membership Published are detailed in this User Guide chapter.

51. Viewing contributors for a specific document

For a listed Deliverable, you can **right click** on the row, select **Drill through** and select **Deliverable Authors**. This will open a list of BioPhorum reps who contributed to this Deliverable.
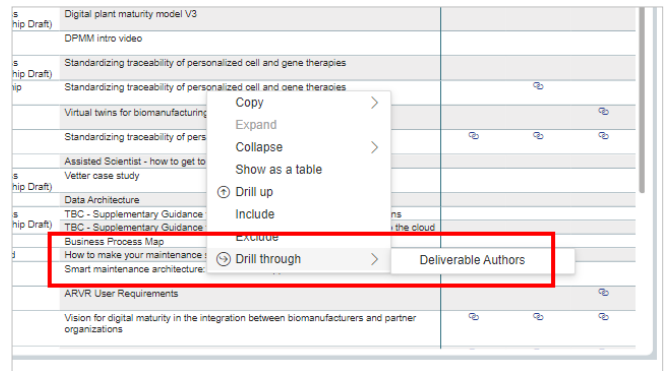
52. Deliverable authors
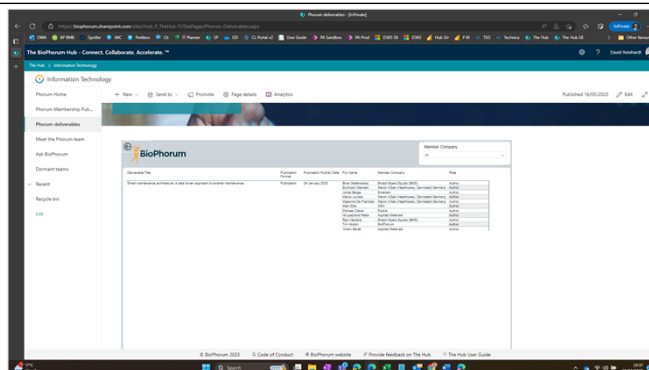
53. Viewing Publication authors and Contributors

You can look up contributions to Publications by author and/or by Member company. This report is accessible from home page on The Hub.

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
21/30

The Hub

On The Hub home page, click on **Member Contribution to Deliverables**
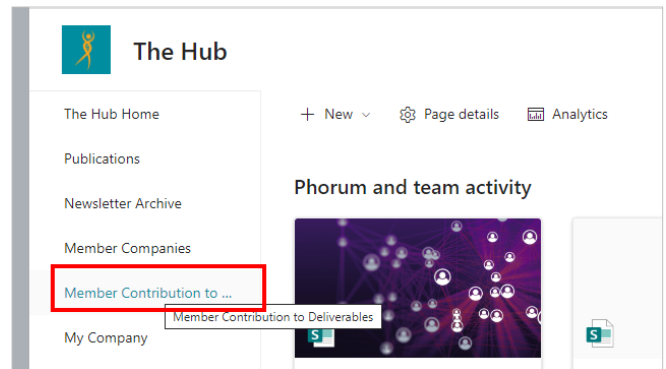
Member contributions to deliverables
Using the filters at the top right of the report, you can filter by Phorum Name, Member Company or Contributor Name.

54. The Engagement Report

The Engagement Report is designed to enable member L2s access to engagement data for all team representatives within their organization.

The report has a series of pages. Each page is designed to answer a specific key question, as detailed below.

- Phorum Overview: How frequently do Teams meet and what is the size of the collaboration?
- Teams in Membership: What Teams are included within the membership(s) selected?
- Participation in Teams: Which Teams is your organization participating in?
- Available Teams: Which Team(s) is your organization not participating in?
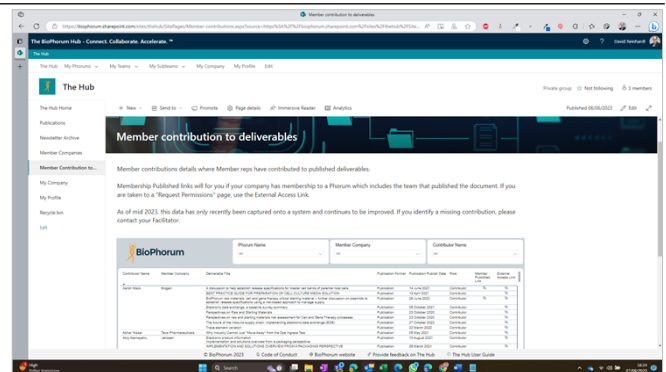- Team Member Engagement: Which of the recent meetings have your team reps attended?
- Events and Webinars: Which Events / Webinars have you been invited to?

- Subteams in Membership: What Subteams are included as part of the Teams within the membership(s) selected?
- Participation in Subteams: Which Subteams is your organization participating in?
- Subteam Member Engagement: Which of the recent meetings have your Subteam reps attended?

55. Using this report

56. Filtering

The filters down the left hand side of the report allow you to filter by a range of dimensions, typically Phorum, Team and Subteam.

Additionally, there may be other options where appropriate to specific pages, e.g. Time Horizon, Contact, etc.

The Time Horizon filter
The window of selection for the Time Horizon filter is based on the number of months selected to date, including the current month. For example, if you are viewing the report on any day during July, selecting a 3

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
22/30

The Hub

month time horizon would show data for May, June and July.

57. Focus mode

Tables within Power BI have the option of opening in Focus Mode, this will bring the specific table into a full screen page which may make it easier to review in detail.

Focus mode
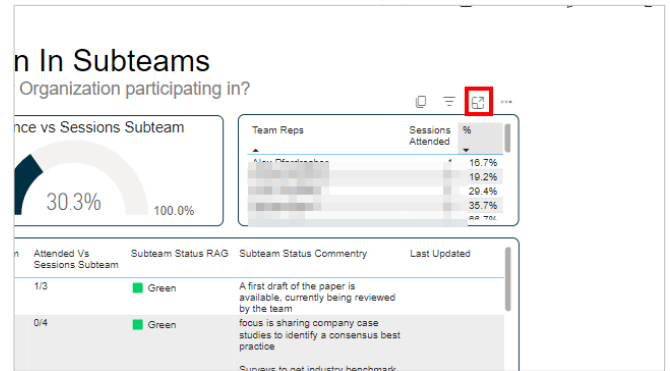
58. Sorting data columns

Click on the triangles at the top of columns to sort the column in ascending / descending alphabetical order
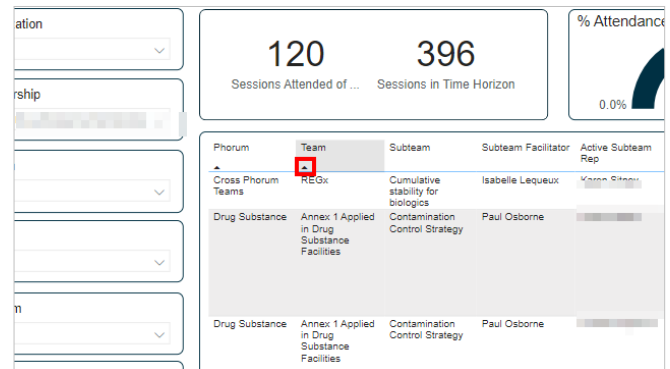
59. Exporting data

You can export data from all pages of the report. The screenshot below shows the Phorum Overview but the same feature is available on all pages.

Click on the area you want to export data from. You will see a menu appear in the top right hand corner of the table

Select to **Export data**

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
23/30

The Hub

Select **Data with current layout** and click **Export**

The file will be downloaded into your downloads folder. You will likely see a pop up in you browser. Click on the link to **Open file** into Excel.

Excel will open the file and you will need to select to **Enable Editing** to edit or save the spreadsheet.
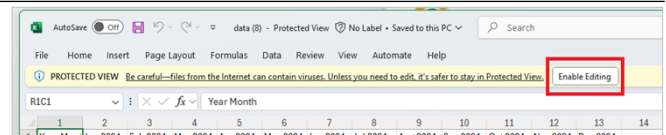
60. Attendance data on the engagement pages

The Team and Subteam Member Engagement pages show whether or not a rep has attended a meeting using colour. Green indicates attended, red indicates no attendance.
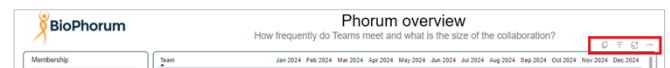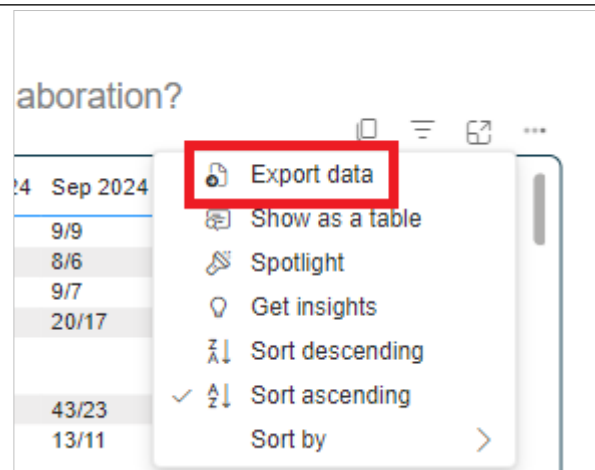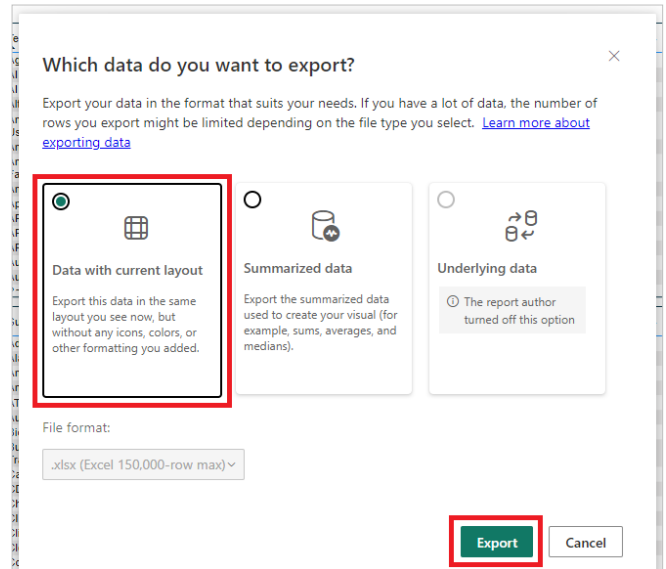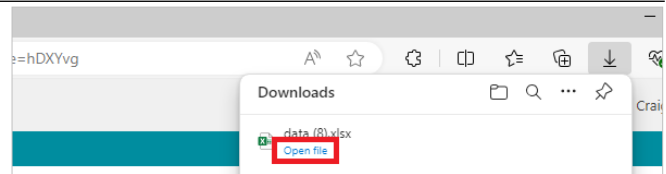
When exporting to Excel, these colours are lost. We have included a "P" in all the attended (green) cells. Consequently, on an Excel export file, you can filter for the presence of "P" (or absence of "P") to identify attended / not attended.

61. Phorum Overview

This page is intended to give a high level overview of what is happening within the selected Phorum.

The top pane shows data at a team level, the bottom pane shows data at a subteam level.

62. Information shown on the report

For months in the past, the report will show an x/y value.
- x: count of attendees from your company
- y: count of unique organizations who had an attendee at the meeting

Note that this page specifically counts all attendees, irrespective of whether they're onboarded to workstreams or not.

For the current month and months in the future, the report will show a single number or a series of numbers separated by a comma. This shows the date(s) of meetings scheduled for the month.

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
24/30

The Hub

63. Teams in Membership

This page lists all the teams available as a result of the membership(s) selected.

There may be teams showing which are outside of the Phorum(s) associated with the selected membership(s). This is because there may be teams included within membership products that are from other Phorums or from the selection of cross phorum teams.

64. Information shown on the report

Headline Numbers
- Organizations: Count of unique organizations with team reps onboarded to the team
- Participants: Count of team reps onboarded to the team
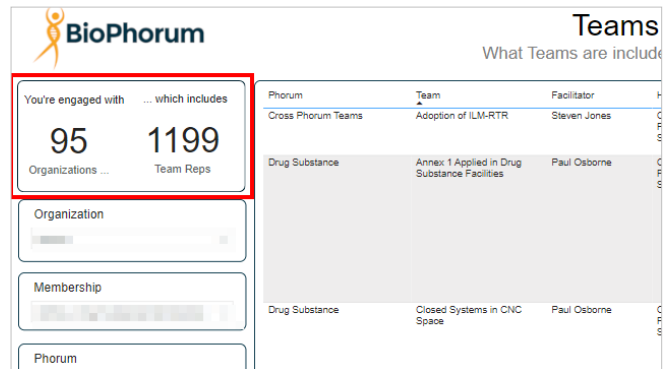
Status RAG and Status Commentary
- The facilitators' assessment of the progress of the team
- RAG = Red / Amber / Green

65. Additional metrics

You're engaged with x Organizations which includes y Team Reps
- x: count of unique organizations who have onboarded team reps across the selection of teams showing
- y: count of unique team reps onboarded across the selection of teams showing
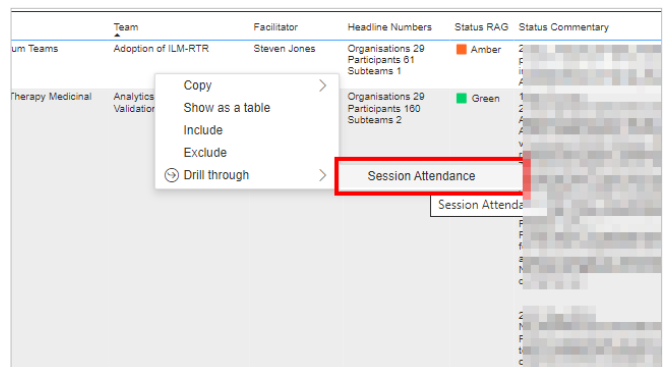
66. Drill through: Team Session Attendance

Right-click on any Team to drill through to **Team Session Attendance**.

The Team Session Attendance page shows all sessions for the specific team that your team reps were invited to.

The metrics across the top of the Team Session Attendance page take into account all reps from your organization. That is to say, if there have been 4 meetings in the time horizon selected, and you've had at least 1 rep at each of the 4 meetings, the % attendance = 100%

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
25/30

The Hub

Use the **<-** back button to return to Team Session Attendance page.
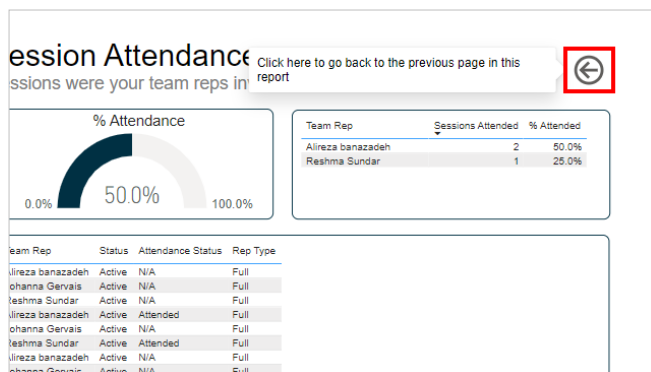
67. Participation in Teams

This page lists all teams that your organization is participating in (filtered by membership(s) selected).

The Time Horizon filter can be used to limit the time frame of meeting sessions being counted within the report.

68. Information shown on the report

- Attended Vs Sessions shows x/y where
  - x = the number of sessions attended within the selected time horizon
  - y = the total number of sessions within the selected time horizon

- Participation Commentary is the BioPhorum facilitator's assessment of the team rep's engagement with the team.
  - This will take into account attendance and active engagement on team calls as well as contribution to team deliverables

69. Additional metrics

x sessions attended of y sessions in time horizon
- x: count of total number of sessions attended by at least 1 team rep of your orgnization within the time horizon for all teams shown
- y: count of total number of sessions within the time horizon for all teams shown

% Attendance vs Sessions
- A dial showing % attendance for the x of y values detailed above

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
26/30
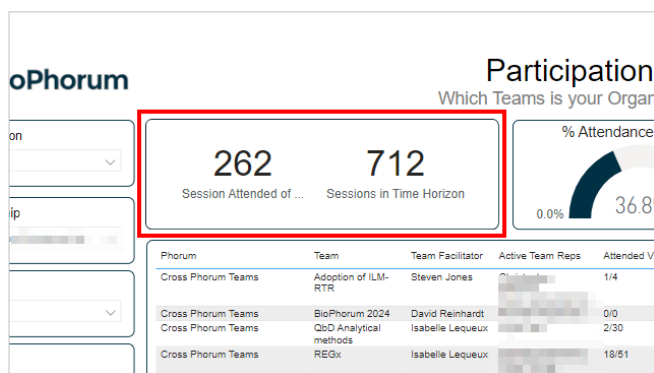
The Hub

This table shows % Attendance for individual team reps within your organization.

This table is shown in this small space to highlight that these details are available. For larger lists it may be easier to use Power BI's Focus Mode button to focus in on this table. You can also right click on the table and choose "Show as table".
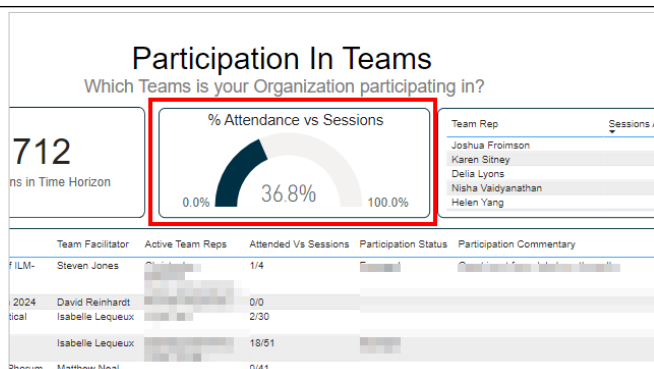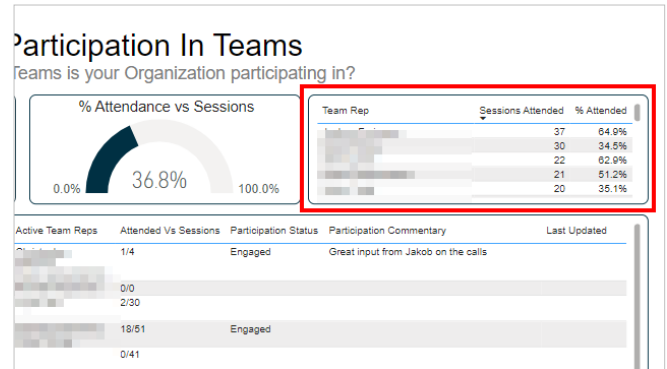

70.   Drill through: Team Session Attendance

Right-click on any Team to drill through to **Team Session Attendance**.

The Team Session Attendance page shows all sessions for the specific team that your team reps were invited to.

The metrics across the top of the Team Session Attendance page take into account all reps from your organization. That is to say, if there have been 4 meetings in the time horizon selected, and you've had at least 1 rep at each of the 4 meetings, the % attendance = 100%
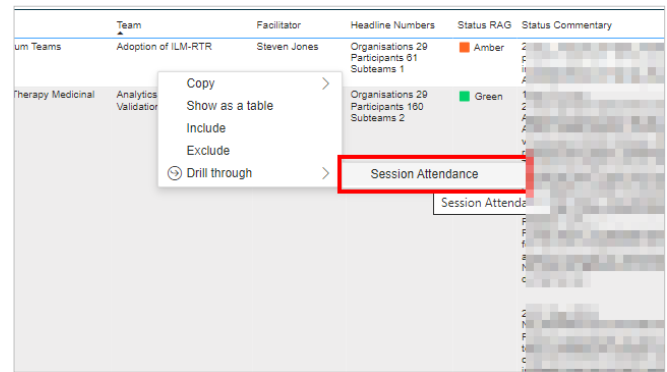
Use the **<-** back button to return to Team Session Attendance page.
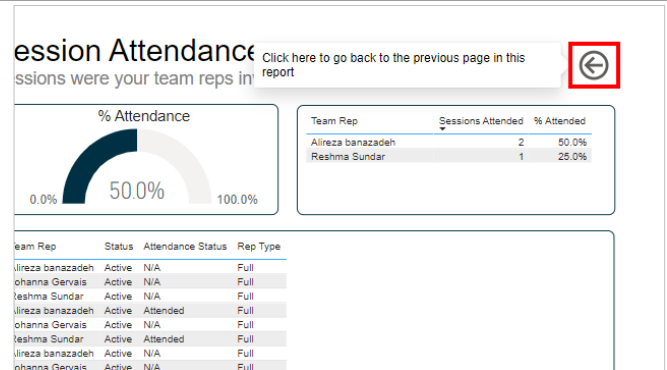
71.   Available Teams

This page is intended to highlight teams that you have access to (as a result of membership(s) selected) but are not currently participating in.

72.   Team Member Engagement

This page details all attendance data for team reps within your organization, filtered by the membership(s) selected.
- Select how many meetings you want to see data for by selecting Last 6, Last 10 or Last 26
  - Meeting 1 will be the most recent meeting for the specific team (row), Meeting 2 the subsequent one, etc.

Dates within the columns will be different for different teams

-
- Green highlighting indicates that the team rep attended the meeting, red highlighting indicates that the team rep did not attend the meeting

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
27/30

The Hub

73. Events and Webinars

74. Information shown on the report

The Attendance column shows an x / y value.
- x: the number of reps from your company that attended
- y: the total number of reps that attended from all companies

75. Drill through: Your reps for a specific Event / Webinar

Right-click on a specific Event / Webinar row on the report, you can choose to **Drill through to Event and Webinar attendance**.

The drill through shows all invitees from your company for the specific Event / Webinar selected.

Use the **<-** back button to return to the previous page.
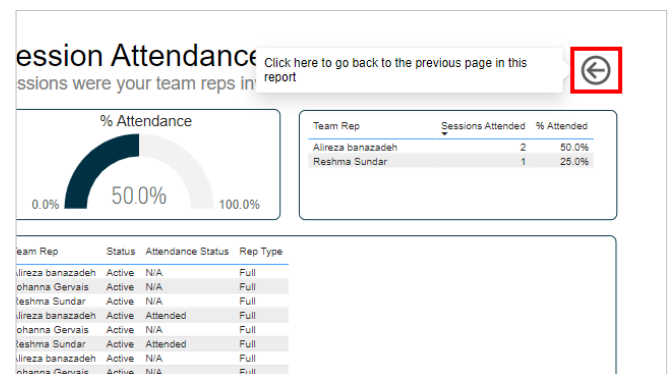
76. Subteams in Memberships

This page lists all the subteams available as a result of the membership(s) selected.

There may be subteams showing from teams which are outside of the Phorum(s) associated with the selected membership(s). This is because there may be teams included within membership products that are from other Phorums or from the selection of cross phorum teams.

This page lists all Events and Webinars that reps from your company have been invited to.

Events and Webinars will be included for any Phorum that is included in the selected Membership(s).

77. Information shown on the report

Headline Numbers
- Organizations: Count of unique organizations with subteam reps added to the subteam
- Participants: Count of subteam reps added to the subteam. This includes all subteam rep types (full, observer and guest)

Status RAG and Status Commentary
- The facilitators' assessment of the progress of the team
- RAG = Red / Amber / Green

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
28/30

The Hub

78.   Additional metrics

You're engaged with x Organizations which includes y
Subteam Reps

- x: count of unique organizations who have subteam reps across the selection of subteams showing
- y: count of unique subteam reps across the selection of subteams showing
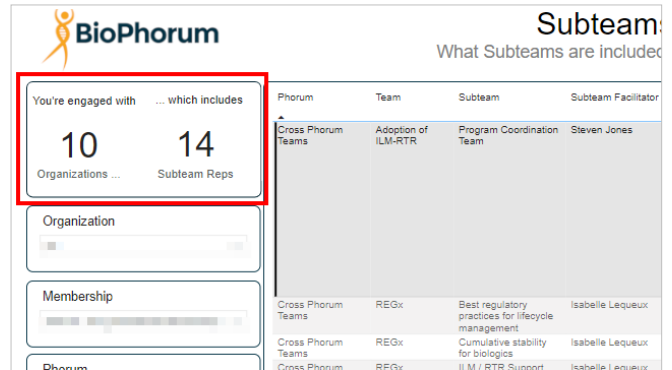
79.   Drill through: Team / Subteam Session Attendance

80.   Participation in Subteams

This page lists all suteams that your organization is participating in (filtered by membership(s) selected).

The Time Horizon filter can be used to limit the time frame of meeting sessions being counted within the report.

81.   Information shown on the report

- Attended Vs Sessions shows x/y where
  - x = the number of sessions attended within the selected time horizon
  - y = the total number of sessions within the selected time horizon

- Participation Commentary is the BioPhorum facilitator's assessment of the team rep's engagement with the subteam.
  - This will take into account attendance and active engagement on subteam calls as well as contribution to subteam deliverables
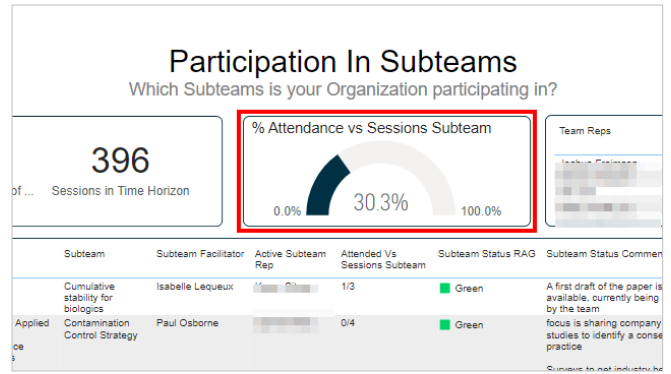
82.   Additional metrics

x sessions attended of y sessions in time horizon

- x: count of total number of sessions attended by at least 1 team rep of your orgnization within the time horizon for all teams shown
- y: count of total number of sessions within the time horizon for all teams shown

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
29/30

The Hub
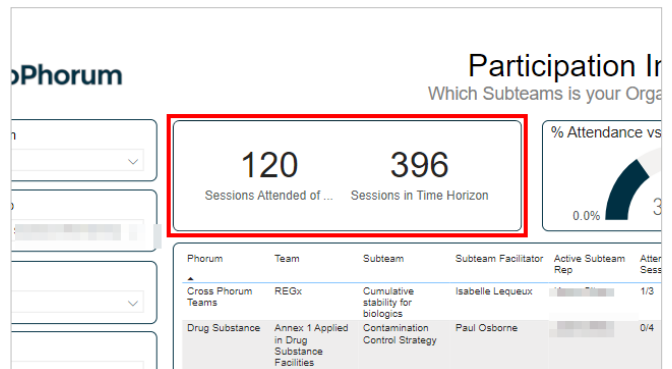
% Attendance vs Sessions
- A dial showing % attendance for the x of y values detailed above

This table shows % Attendance for individual subteam reps within your organization.

This table is shown in this small space to highlight that these details are available. For larger lists it may be easier to use Power BI's Focus Mode button to focus in on this table. You can also right click on the table and choose "Show as table".
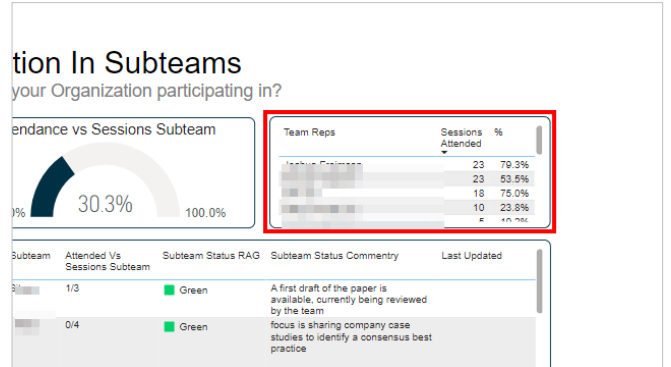
83. Subteam Member Engagement

This page details all attendance data for subteam reps within your organization, filtered by the membership(s) selected.
- Select how many meetings you want to see data for by selecting Last 6, Last 10 or Last 26
  - Meeting 1 will be the most recent meeting for the specific team (row), Meeting 2 the subsequent one, etc.

Dates within the columns will be different for different teams
  -
- Green highlighting indicates that the team rep attended the meeting, red highlighting indicates that the team rep did not attend the meeting

84. Conceptboard for Members

Conceptboard is a web based whiteboarding system which we use to help collaborate on conference calls.

Our reference guide to Conceptboard can be found here.

85. Frequently Asked Questions (FAQs)

86. Working with documents

How do I change the name of a file in the membership draft document library?
Team Reps cannot change the name of an existing file. This is due to a SharePoint constraint. You will need to ask your facilitator to change the name of the file for you.

87. Ask BioPhorum

I added an image to my Ask BioPhorum text but it disappeared
Due to a SharePoint bug, you cannot directly add images to Ask BioPhorum posts. If you need to add an

BioPhorum Operations Group LTD

reinhardtd@bioph
orum.com
November 13, 2024
30/30

The Hub

image, your Facilitator will be able to help you do this.

88. Known issues

There are some issues which are known to The Hub development team. There is ongoing work to resolve these. They are listed here as a reference so that if you experience them, you can be assured that it is not specific to your system or system setup.

89. Calendars on The Hub sites show meetings in the wrong timezone

The calendar items on The Hub sites sync directly from our scheduling system (Microsoft Dynamics). Some test users have observed that when looking at the calendar entries on Phorum / Team / Subteam pages, they are in the wrong time zone. If you open the calendar entry, the correct times are shown.

This seems to be due to a peculiarity in SharePoint setup. The Hub SharePoint sites are set to be in the UK time zone however, each user also has their own, personal, SharePoint time zone setting. Additionally, this setting is specific to each user's access to BioPhorum's SharePoint.
You can update your own time zone setting within BioPhorum's SharePoint by following these instructions from Microsoft.

The Team calendar as it appears on one of The Hub SharePoint sites
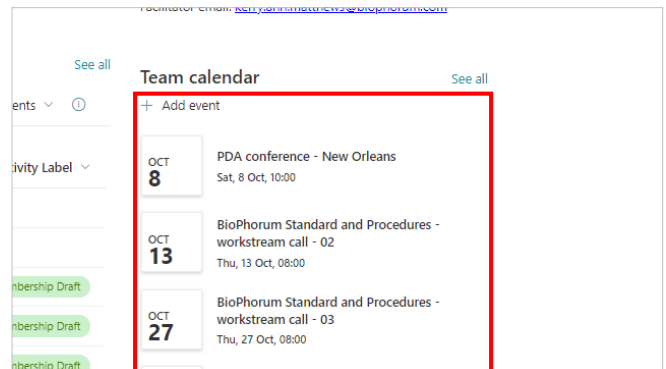
90. I am unable to add an image to an Ask BioPhorum post

When capturing the text for an Ask BioPhorum post you are able to add an image in the text editor but when you saved it, this image did not appear.

This is due to a bug in the Ask BioPhorum "create new post" feature, if you edit the page after it is created you will be able to add an image.

This bug is queued for a fix from our developers.