Healesville Community Renewable Energy Inc
Governance12 – G-Suite Framework

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Policy Type	Governance	Subject	G-Suite Framework
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1 Introduction

G-Suite is a collection of applications provided by Google LLC (limited liability company). Healesville CoRE has signed up as a Not For Profit organisation for free use of the software and uses G-Suite business tools, such as Gmail, Calendar, Google Meet, Google Drive (shared document folders), Google Chat (messaging). This enables easier collaboration of activities within the organisation and provides secure backup of data.

An Integrated Online Administration System project was run by Healesville CoRE in 2020, to integrate G-Suite with CiviCRM. CiviCRM is the Customer Relationship Management system used by Healesville CoRE. Healesville CoRE uses WordPress as its web publishing tool. CiviCRM is integrated with WordPress.

This G-Suite Framework policy is intended to be a high-level introduction to how Healesville CoRE uses the G-Suite applications for administration and management of the organisation. There may be instances in the G-Suite functionality where the integration with CiviCRM must be considered and where a choice has to be made on whether to use G-Suite or CiviCRM for a specific administration purpose.

2 Purpose

This policy is intended as a high-level introduction to how Healesville CoRE uses some of the G-Suite technology for data storage and communication practices.

3 Policy

The prime applications that Healesville CoRE utilises from G-Suite are Gmail, Drive, Calendar, Chat and Meet. Most people are familiar with application packages of this type. Healesville CoRE use of these applications is summarised below. The sub sections below include explanations of how G-Suite has been adopted and implemented by Healesville CoRE.

Healesville CoRE has an Intranet that provides detailed instructions on the use of G-Suite for Healesville CoRE. The Intranet will be accessed from the G-Suite application called Sites.

3.1 Single Source of Truth/Master Slave Principle

When using multiple software packages, there may be overlap of data in the different applications. In information systems design and theory, single source of truth is the practice of structuring information models and associated data schema such that every data element is mastered in only one place.

Healesville CoRE has applied the following source master rules:

1. **G-Suite is the master source for a login**. This means that any login to WordPress (ie CiviCRM) is authenticated by G-Suite. This means that a WordPress/CiviCRM login cannot be created unless that login is already in G-Suite. The “single login” for users with a Healesville CoRE G-Suite account, is achieved by synchronising the procedure of creating an account:
    a. Step1: Create email address and password in G-Suite

b. Step 2: Create WordPress user with same credentials in WordPress
c. A WordPress plugin installed, now enables end user to login into WordPress using the G-Suite account, by a single click
d. The actual permission to access WordPress is done by using Google authentication when clicking on the G-Suite button to login

2. **CiviCRM is the master source for Groups**. This means that a Group is established and defined in CiviCRM and then populated electronically into G-Suite with the following process:
   a. Healesville CoRE identify the group of contacts to sync
   b. Healesville CoRE raise a ticket requesting Audienceware to apply the new sync
   c. Audienceware apply and System Test
   d. Healesville CoRE perform User Acceptance Test.

This process has not yet been automated and the cost of work done by Audienceware will be charged to Healesville CoRE. The group that was synchronised in the G-Suite Integration Project was a group called "All Individuals" in CiviCRM.

3.2 Single Sign-on (SSO) and Same Sign-on

The definitions that we'll use for Healesville CoRE references are:

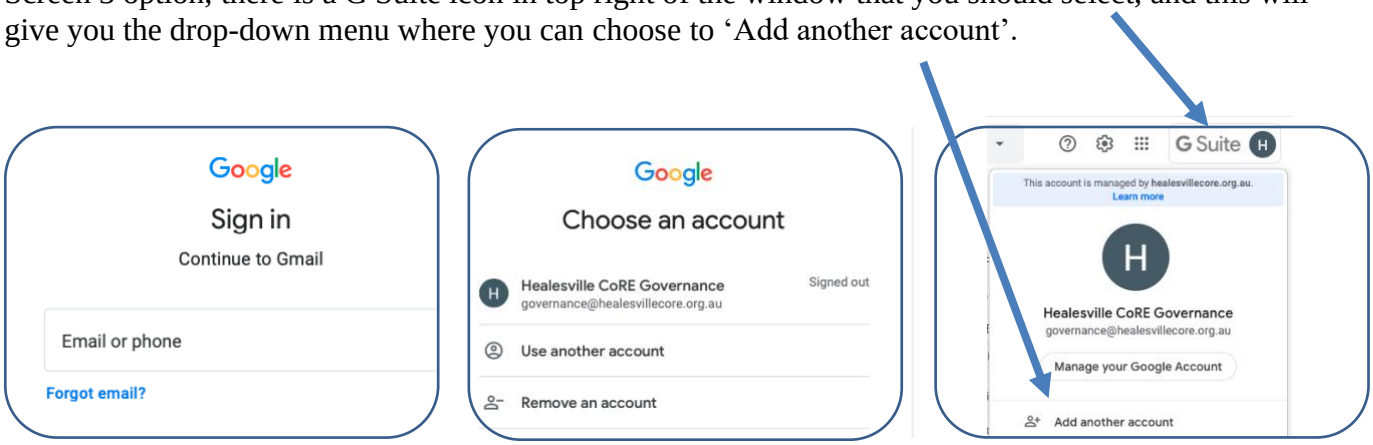
Single sign-on (SSO) is an authentication process that allows a user to access multiple applications with one set of login credentials. With SSO, a user logs in once and gains access to different applications, without the need to re-enter log-in credentials at each application. This has not yet been implemented for the Healesville CoRE administration functions.

Same sign-on is the option that synchronizes user ids and passwords to the various places where authentication might occur. Healesville CoRE uses this option for login authentication as described in point 1 of paragraph 3.1 above.

3.3 G-Suite login

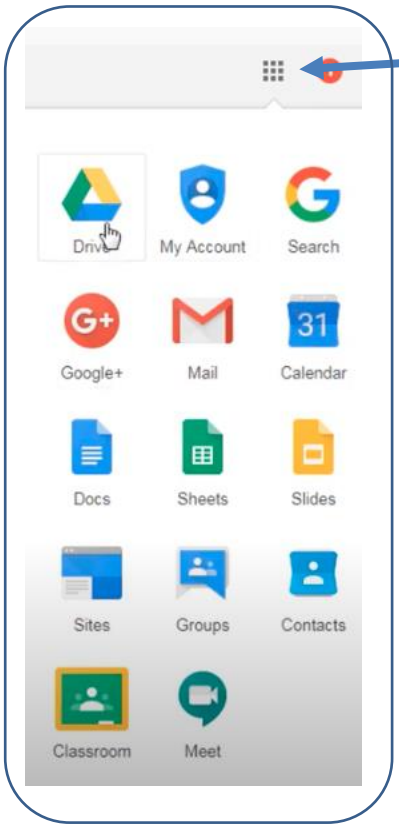
A person logs on to Gmail from a mobile phone, tablet or a computer screen. The screen images in this document are from a computer access.

Login from an internet search engine by access through www.gmail.com. If you have not used Gmail before, you'll see a screen similar to the images below: Screen 1 if this is the first time you are using Gmail, Screen 2 if you already use Gmail and wish to 'Use another account' and screen 3 if you are already logged in to a Gmail account and wish to use your new @healesvillecore.org.au login. For the Screen 3 option, there is a G Suite icon in top right of the window that you should select, and this will give you the drop-down menu where you can choose to 'Add another account'.



Screen 1 Screen 2 Screen 3

When you are using Gmail and have more than one Gmail account, you can toggle between your different email accounts by selecting the G Suite icon as shown on screen 3 above and you'll have the option to select which Google account you wish to use.



The '**Waffle**' is the grid of nine small grey boxes that you find in the top right corner of your browser when you are using Gmail, Google Drive, Google Calendar, Google Meet, Sites etc. If you hover your mouse/pointer over the Waffle for a second or two the words 'Google apps' will appear.

When you click on the Waffle, a window with available Google apps will be shown. The prime G-Suite apps that Healesville CoRE uses are Mail, Drive, Calendar, Chat and Meet.

You can rearrange the app display by clicking on an app icon and holding the cursor on that icon while you drag it and reposition as you wish. This means that you can move the apps that you don't use to the bottom of the display window.

You can customise the app display by scrolling to the bottom of the display and clicking on the 'More' or 'More from G Suite Marketplace' prompt. The G Suite Marketplace apps are developed and offered by third-party developers. Install an app only if you trust the app's developer and vendor. You're solely responsible for any compromise or loss of data that may result from using a G Suite Marketplace app.

3.4 Gmail

Healesville CoRE email addresses are assigned with the domain name of healesvillecore.org,au.

Emails can be sent via Gmail or via CiviCRM. It is a requirement that all bulk emails be sent via CiviCRM and they must NOT be send via Gmail. Use Gmail only for individual emails within Healesville CoRE or for outside emails where it is considered a permanent record is not required against that person's CiviCRM record. Synching of emails has been set up one way from G-Suite to CiviCRM.

Healesville CoRE uses the G-Suite Google Mail (Gmail) facility for business as usual communication emails. Where possible use Chat rather than Gmail for internal communications.

Each Healesville CoRE member who will use the organisation applications will be allocated a G-Suite login which is the member's Personal Id. It is for use of the G-Suite applications for Healesville CoRE related activity. Format of the Personal Id is firstname.lastname@healesvillecore.org.au. A Healesville CoRE Personal ID should be used only for Healesville CoRE related activities. It is not for personal use because the presence of the @healesvillecore.org.au domain name, is inference that this is business being conducted on behalf of Healesville CoRE.

A Role Id is given to office bearers of a particular responsibility and communication using this Role Id is communication that relates to activities for that role. Format of the Role Id is role@healesvillecore.org.au. If the role is two words then these are separated by a dot. The roles that are being used include president, vice-president, treasurer, secretary, memberships, technical.manager, grants.officer, media.manager and governance. If the office bearer of a role changes, then 'ownership' of the Role Id is passed on to the next person. This enables any history of communication for that role to be retained in one location for the organisation. It also enables folder and file ownership privileges to remain in place so that the new office bearer can continue seamlessly with the documentation responsibilities of the role. A Healesville CoRE Role ID should be used only for activities related to the role. It should not be used for any communication or folder/file ownership privileges that are not related to the role. This discipline is important to maintain because when ownership of the role changes, then the new office bearer owns all of that correspondence which is used for reference to the role activities and responsibilities. The previous office bearer will no longer have access to that correspondence.

3.5 Google Drive

Healesville CoRE uses Shared Drives in *Google Drive* to store and access files for the organisation. The terms of *drive* and *folder* both refer to a collection of electronic files in a defined data repository. The terms *drive* and *folder* may be used interchangeably in documentation.

The Shared Drive files belong to Healesville CoRE and are maintained by Healesville CoRE office bearers on behalf of the organisation. This assists with retaining the working and deliverable files in the organisation, when a member leaves Healesville CoRE.

There are two Shared Drive types for each Role Id:

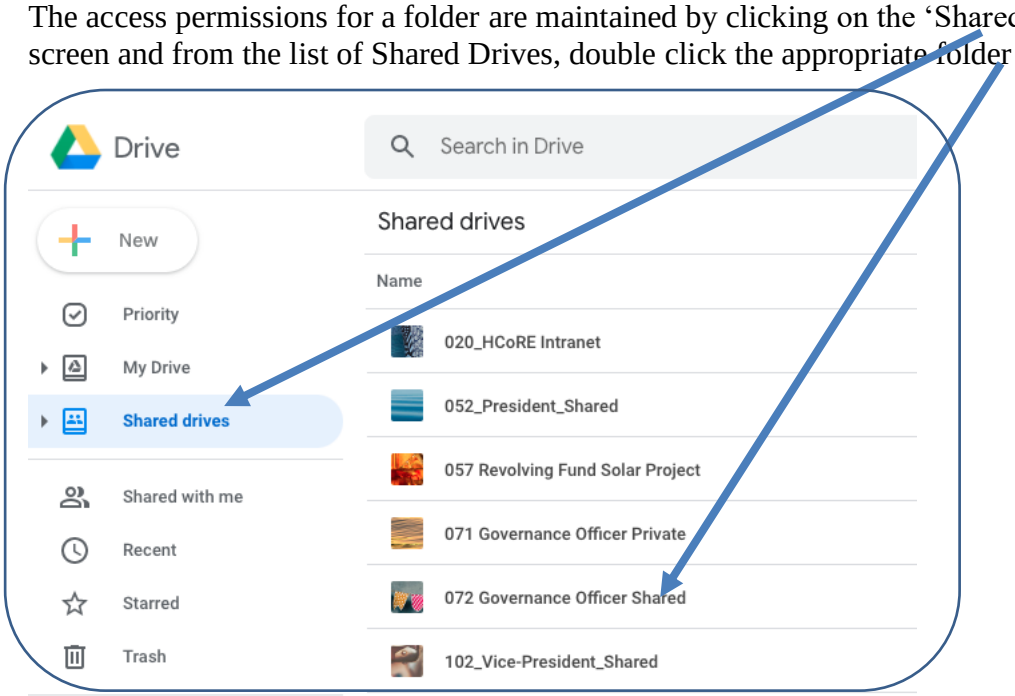
- **A personal Shared Drive for each login** (which is an organisation role in our model) is an effective **private** drive for that user, e.g.: ***071 Governance Officer Private***. This has been established so any private work for Healesville CoRE can be stored and worked on prior to it being made available on a shared drive. and
- **A multi login Shared Drive for each login** and this is a truly **shared** drive that can be accessed by authorised users, e.g.: ***072 Governance Officer Shared*** which has permission access granted to specific users, as explained in the next paragraph.

Google Drive enables different permissions and level of access:

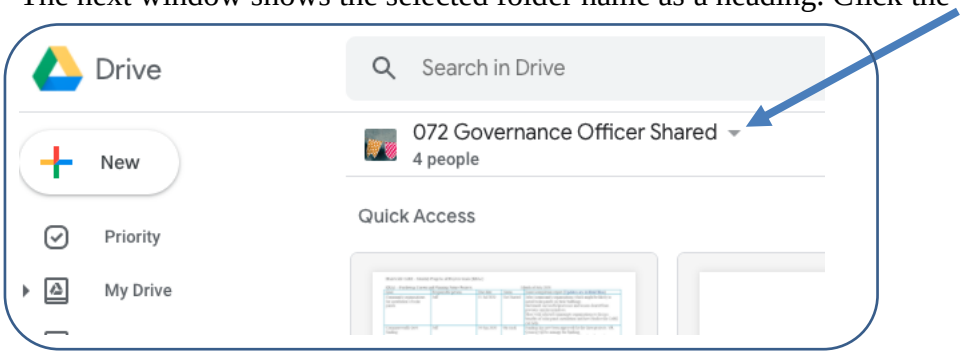
- **Manager** can manage members and upload, edit, move or delete all files
- **Content manager** can upload, edit, move or delete all files
- **Commenter** can comment on all files
- **Viewer** can only view all files

A person with G-Suite administrator privileges has set up and maintains the folder structure and access privileges of folders and files in the G-Suite data repository. The G-Suite Administrator defines a login with “Manager” access and the “Manager” assigns appropriate levels of access to other members as per the list above.

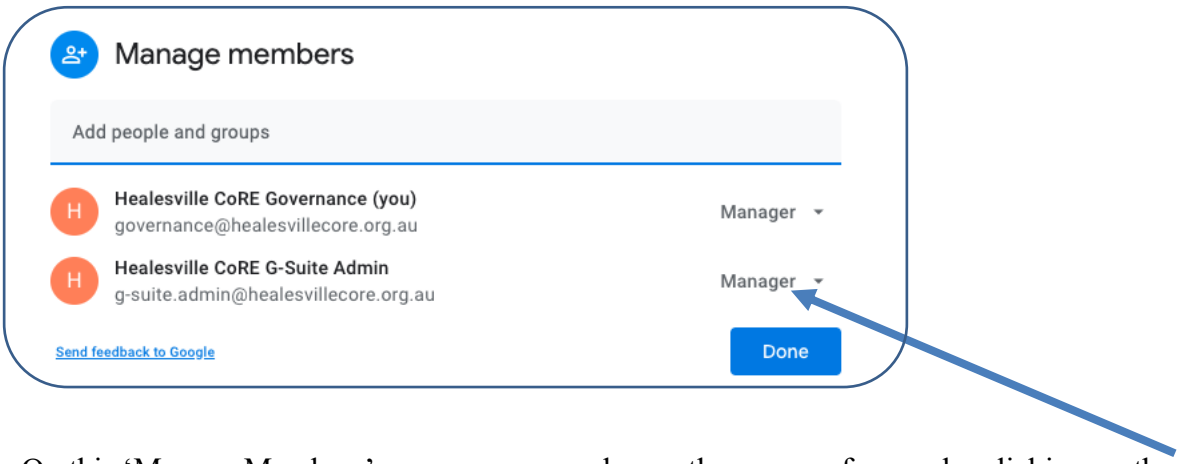
The access permissions for a folder are maintained by clicking on the ‘Shared Drive’ option in the Drive screen and from the list of Shared Drives, double click the appropriate folder name:



The next window shows the selected folder name as a heading. Click the ▾ icon after the folder name.



You will then see a drop-down menu where you click on 'View Members' to get the 'Manage members' screen.



On this 'Manage Members' screen, you can change the access of a user by clicking on the current access for that user and selecting a new option or Add people and groups if required.

Google Drive File Stream is a desktop application that allows you to quickly access all of your **Google Drive files** on demand, directly from your computer.

To download for windows use https://dl.google.com/drive-file-stream/GoogleDriveFSSetup.exe
To download for Mac use https://dl.google.com/drive-file-stream/GoogleDriveFileStream.dmg

Once you have downloaded and run the installation file it will ask you to login using your Healesville CoRE email and password. Once done you will then be able to see all your G-Suite Shared Drives in Windows File Explorer or Apple Finder and all the files contained in them

3.6 Folder Structure

Healesville CoRE uses a Folder Structure that mirrors the functional structure of the Central Committee.

The top-level folders in Google Drive are called Shared Drives and the name of each Shared Drive begins with 2 digits that identify which Central Committee member has functional responsibility of that folder content. For example, the President is **manager** for folders beginning with 05 and 07, such as:

- 051 President Private
- 052 President Shared
- 054 Strategic & Business Planning
- 055 External Relations
- 072 Governance Officer Shared.

The Vice President is **manager** for folders beginning with 10, 11, 13 and 14, such as:

- 101 Vice President Private
- 110 Grants Applications & Acquittals
- 133 2019 Solar Hot Water Offer
- 141 Grants Officer Shared.

The Secretary is **manager** for folders beginning with 15 and 16, such as:

- 151 Secretary Private
- 155 Central Committee Meetings
- 160 Membership
- 162 Membership Coordinator Shared

The Treasurer is **manager** for folders beginning with 20, such as:

- 202 Treasurer Shared
- 203 Financial Records.

The **manager** of each Shared Drive is responsible for maintaining the sub folder structure and other user access permissions for the drive (Ref: Permissions and level of access in 3.5 Google Drive above).

Refer to the G-Suite topic in Healesville CoRE Intranet which has detailed information on this subject and a full list of the Shared Drive matrix. The matrix shows the Shared Drive Manager for each shared drive and which other roles have access to that shared drive.

3.7 File Naming Convention

Healesville CoRE has a preferred file naming standard so that the name is consistent with its content and meaningful so that it can be found if doing an electronic search.

Healesville CoRE standards include:

- file names should be short but descriptive
- avoid special characters in file names (except for - or _)
- use date format ISO 8601: YYYYMMDD
- include a version number

An example name convention is: <Meaningful Name><Number> _ <Version number> . <Extension>
e.g. G-Suite-Folder-Structure-Proposal-03_v02
From the file name we know:

- this is a proposal document for a folder structure
- there have been 2 earlier similar documents
- this document is version 2

3.8 Document Register

All computer files and documents are a form of information that must be retrievable when required. The Document Register is a list of the documents that exist within a business and have been utilised at any time for activities of the business. The Document Register may refer to a group of documents, such as Central Committee meeting minutes, or it may refer to an individual document, such as the Rules of Association for Healesville CoRE.

Healesville CoRE has the policy that all paper documents that are deemed as records are scanned and kept electronically as well as stored securely in a physical repository. This Document register includes details of scanned paper documents.

The Document Register includes data for each document and includes:

- Sequence number
- Document Type (e.g.: incorporation, financial, invoice, minutes, governance).
- Document name
- Description (additional detail if requited)
- Location (Folder name or physical location; will hyperlink to folder if, e.g: this refers to one folder that contains meeting minutes for a defined year)
- File name if appropriate; will hyperlink to the file
- Date
- Comments

The Secretary is accountable for the Document Register maintenance. The Secretary may allocate the responsibility of this task to another Healesville CoRE member.

3.9 Google Calendar

Google calendar is the calendar functionality that is provided by Google.

Standard functionality is available to include other calendars on a Google calendar display. This means that a person can set up their Google Calendar to include a display of appointments from another calendar. This capability is useful to perform so that any activities assigned to a person in CiviCRM are also shown in that person's Google Calendar. It is similarly useful to have any Healesville CoRE general events that are listed in CiviCRM to be shown in the person's Google Calendar.

The 'Connecting Calendars' manual explains how to synchronise a Google Calendar with CiviCRM activities and appointments. This manual is available from the Healesville CoRE Intranet.

If you are currently using Google Calendar for non-Healesville CoRE purposes, then you can add the Healesville CoRE details to your everyday calendar and so integrate the Healesville CoRE appointments into your own appointment calendar. They will be shown in a different colour and can assist in scheduling your time. This is achieved by following the same process as described immediately above.

3.10 Google Chat

Google Chat is a messaging system that is provided as part of the G-Suite applications. It is accessed by using the same login credentials and password that is set up for Gmail and the other G-Suite applications.

This allows standard message communication between Healesville CoRE G-Suite users. It enables creation of rooms for ongoing conversations with groups of people.

The Google Chat app is also available on a mobile phone. The same G-Suite login id is used on the mobile phone and use of the same database means that conversations can be continued across different devices. The mobile app provides the option of chat with one co-worker or a room (group of people).

3.11 Google Meet

Google Meet enables video conferencing to anyone with a Google account.

A person needs a Google account to organise a Google Meet. A Google Meet must be set up by one person and this person invites others to join.

You don't need a Google Account to participate in a Google Meet. The meeting organizer or someone from the organization must grant access for the non-Google Account person to join the meeting. A person cannot join a Google Meet from a mobile device if they are not signed into a Google or Gmail account.

4 Related Documents

Governance04 - Records Management

Management01 - Central Committee Structure

Management02 - Subcommittees

Management03 - RACI Matrix

Shared Drive - 020_HCoRE Intranet & User Manuals