TANDEM

Research and Innovation Action (RIA)

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Project management toolbox

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Summary

Deliver to the consortium a Project management toolbox and put in place a validation process for deliverables and monitoring, online document workspace, GDPR compliance,risk management and monitoring, organizing project meetings, administrative and financial management.

Approval

Date	By
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D7.1 – Project Management toolbox

WP7 - Task 7.1

October 31st 2022 [M2]

Claire Vaglio-Gaudard (CEA)

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History

Date	Version	Submitted by	Reviewed by	Comments
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Abbreviations and Acronyms

Acronym	Description
GA	Grant Agreement
WP	Work Package
ECM	Enterprise Content Management
ExCom	Executive Committee
PMO	Project Management Office
GDPR	General Data Protection Regulation

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1 Executive Summary

This document describes the online workspace set up for the TANDEM project. This online platform enables for document sharing, workflow management for deliverables and milestones, and the management of the different access rights of the users, depending on their profile. The aim of this document is to provide a good overview of the different possibilities of the project management toolbox and to describe its functionalities.

Keywords

Project management; online workspace , FLEXX platform, Teams channel

2. Overview

The TANDEM project management toolbox consists of two distinct tools: a web platform and a Teams channel.

The web platform was set up in September 2022 and released online to the consortium participants. The tool implemented to host the web platform, FLEXX, was developed and is managed by LGI.

The address to access the TANDEM web platform is https://app.flexx.camp/tandem. The platform is hosted in Europe. The internal web-based document management tool of the project is used for internal exchanges and the publication of reports and deliverables, with access restricted to project partners. This tool will allow **continuous information exchanges and knowledge transfer within the consortium, as well as promote the integration of the work performed in a GDPR-compliant framework**.

The TANDEM web platform is maintained, administrated and updated by LGI (as PMO). LGI is in charge of account creation and permissions management. An account was created for all initial participants of the project. The beneficiaries' main contacts must keep the Project Coordinator and the PMO informed when participants leave or join the project, so that old accounts are deleted and accounts for new participants are created. After the end of the project, the FLEXX platform remains available for one additional year before being deleted by LGI. Each TANDEM partner will archive the content of the platform according to their needs.

A Teams channel was created specifically to facilitate the communication within the project. It is hosted by LGI. All partners and contributors were invited to this channel, which will constitute the **working space to collaborate on documents and to trigger discussions among partners**. After the end of the project, the Teams channel will be deleted by LGI. Each TANDEM partner will archive the content of the channel according to their needs.

3. FLEXX main modules

2.1 ECM

FLEXX has a document management module, called Enterprise Content Management (ECM), which is used for internal exchanges and publication of reports and final deliverables, with restricted access for project partners.

Internal document exchanges between the beneficiaries will be achieved as much as possible by electronic means via the ECM.

A screenshot of the TANDEM web platform is shown in Figure 1.

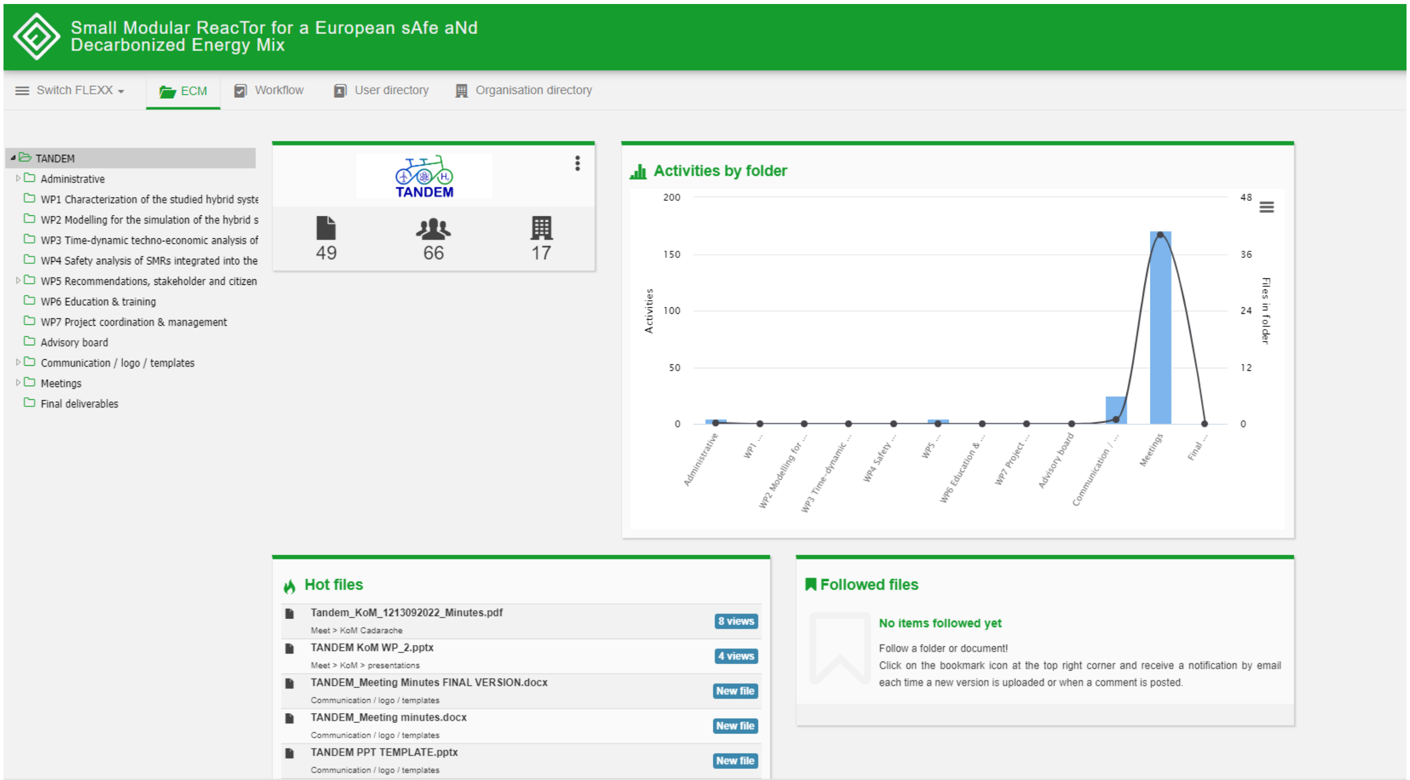

Figure 1: FLEXX landing page

Folders and documents can be created, shared in the collaborative work folders (see Figure 2).

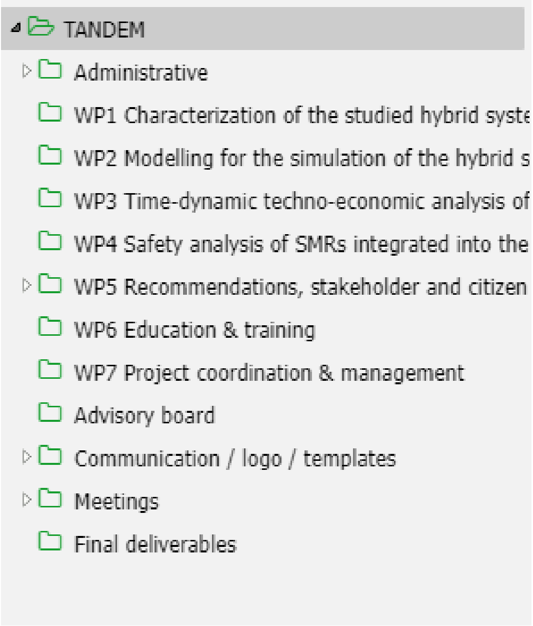

Figure 2: TANDEM collaborative platform folders' organization

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The folders are related to:

- the official documents related the project funding, consortium, reporting,

- the different TANDEM Work Packages,

- the final deliverables,

- the external groups who will interact with the TANDEM project (Scientific Advisory Committee and Industrial User Group),

- the meetings related to project management (meetings for kick-off, ExCom, Governing board, project review, etc).

This preliminary structure will be updated according to the needs of the project, whenever necessary along the project duration.

The arrows next to the folder names expand them and show their contents, and there is a search field on the top to find a specific file (searches in file name only). Any folder can be clicked on to see what is contained within.

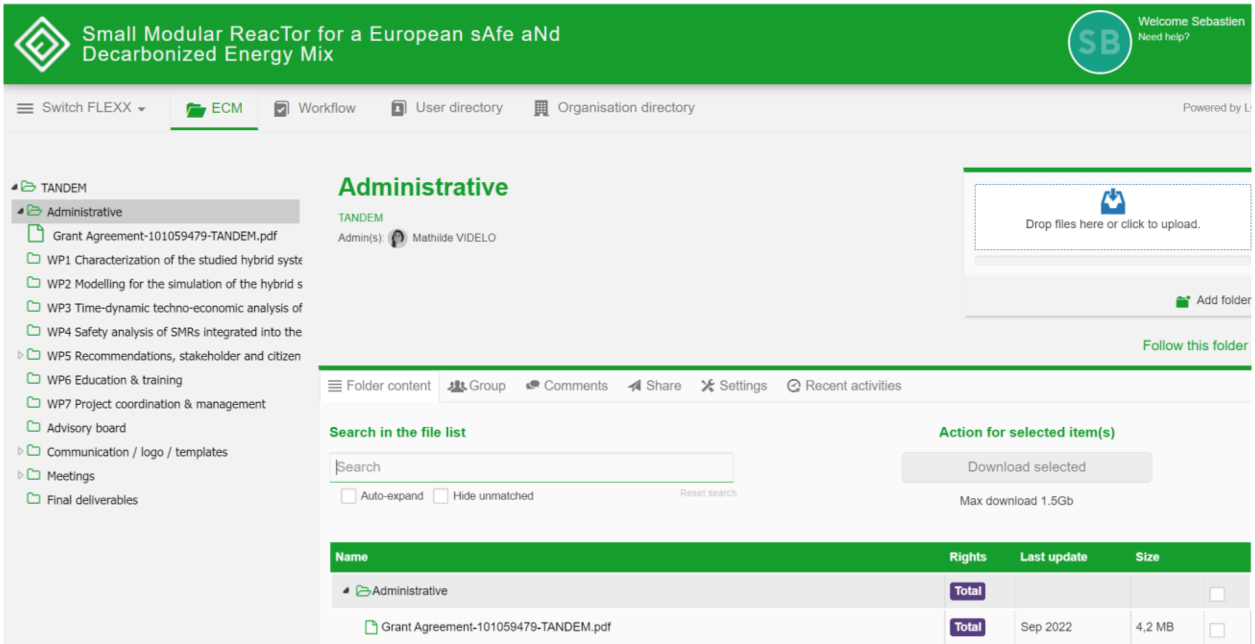

Figure 3: Folder contents

In the folder view in Figure 3, any file can be selected to see a preview. To download a file or multiple files, the user must check the box to the right of the file name for every item to be downloaded, then click “Download selected”. If multiple items are selected, they will be downloaded in a zip file (compressed archive). Other options are available in the folder view:

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1. On the Group tab, permissions for the file selected for each user or user group can be viewed
2. On the Comment tab, comments may be added
3. On the Share tab, a click on the link generated by the system will copy it to the clipboard. Alternatively, clicking the Send mail button will compose an email on the platform itself
4. At the top right, there is a drag & drop area for uploading files (if the file in question has already been uploaded, a new version can be added just by dragging it here). Below the upload area, there is the option to download the file. Users can also receive notifications if the file changes by clicking on "Follow this file".

Access rights to the web platform are summarized as follows:

- **For all project participants:** rights to read and add files in the folders
- **For the Coordinator and the PMO members:** rights to read, add and delete files in the folders

The content of this TANDEM web platform will evolve during the lifetime of the project with the inputs of all participants.

3.2 Workflow

2.2.1 Workflow overview

This section is intended to help with the supervision and management of project deliverables. It contains an overview of the current status of project (Figure 4).

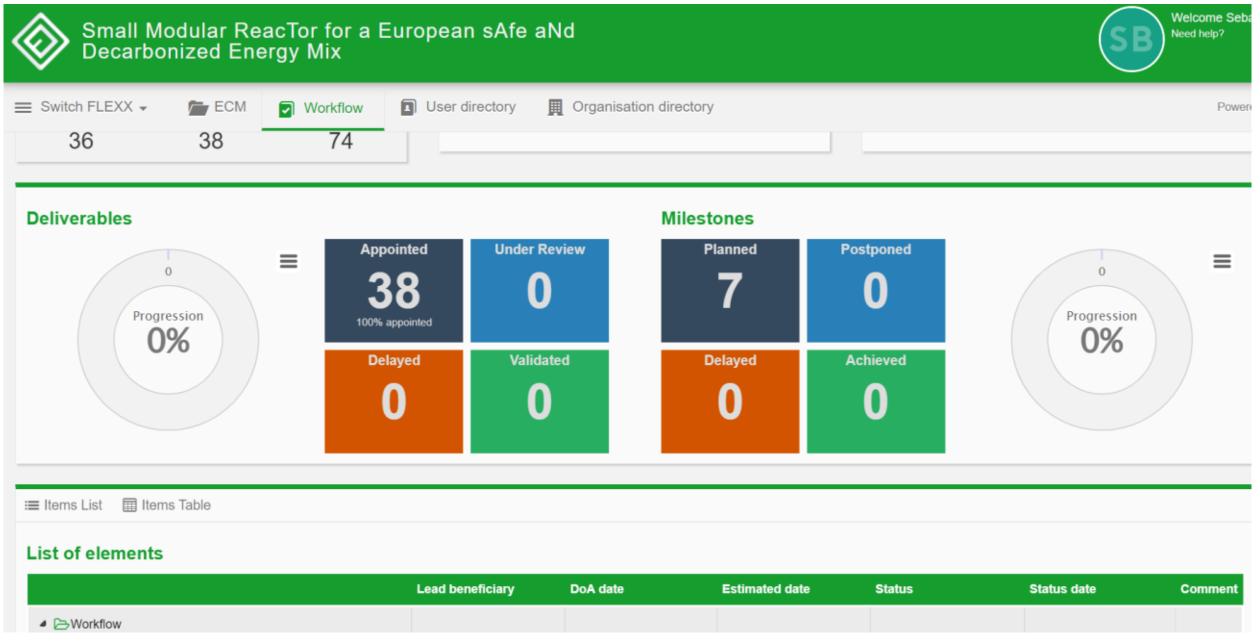

Figure 4: Workflow overview

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General information is displayed about the project (top left), as well as notifications, such as pending deadlines (top center), and responsibilities (top right). Just below, deliverables and milestones are listed at a glance. Deliverables may have the following properties:

1. Appointed/not appointed: whether an author has been designated. Designating authors for all deliverables is one of the first things to do when a project starts
2. Under review: the deliverable has been submitted internally, and is being reviewed before approval
3. Delayed/postponed: a deliverable is delayed if its delivery deadline has passed (unresolved – no new deadline set). A deliverable is postponed if the internally scheduled delivery date differs from what is in the Grant Agreement (resolved – a new delivery deadline and a justification has been entered into the system). If the delivery date has been modified in the GA as part of an Amendment, the new date will take precedence (i.e. the deliverable will no longer appear as delayed unless the new deadline has also expired)
4. Validated: the deliverable has been submitted and passed the internal peer review. Validated deliverables are ready to be submitted to the European Commission via the Participant Portal.

Milestones may have the following properties:

1. Planned: milestone entered into the system
2. Postponed: a new deadline has been set
3. Delayed: the milestone has not been achieved, but the deadline has passed with no new deadline set
4. Achieved: the milestone has been achieved

Scrolling a bit further down this page shows the list of deliverables/milestones per WP in detail (Figure 5).

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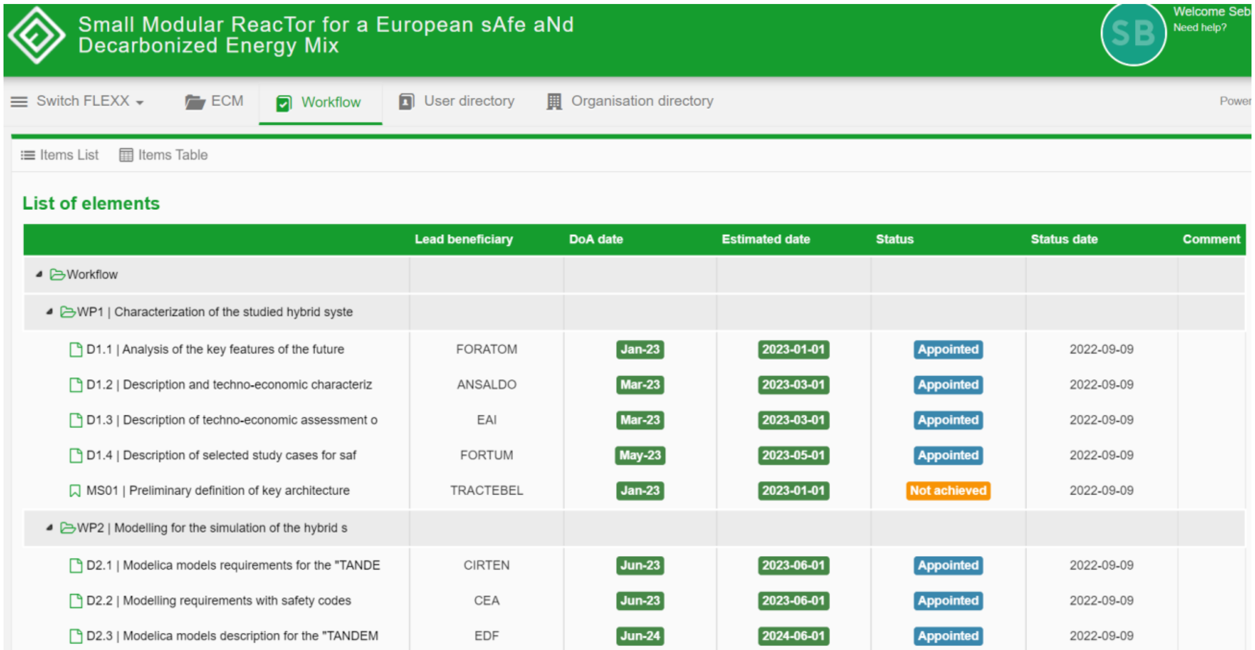

Figure 5: Deliverables and Milestones list

This shows the name and number of the deliverables/milestones, lead beneficiary, official date (as per the GA), estimated date, status, status date and comments for every deliverable and milestone. Clicking on one of them will take the user to the page shown in Figure 6.

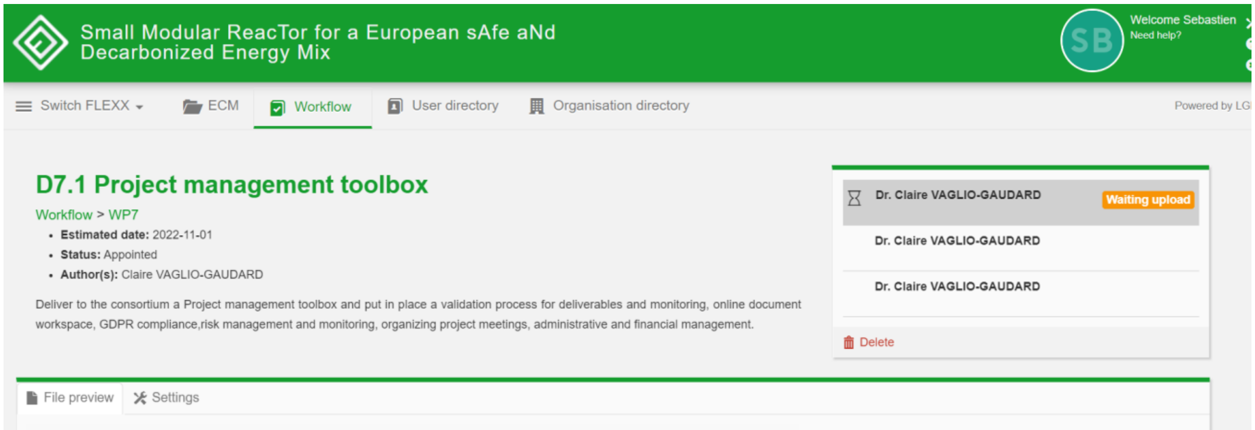

Figure 6: Deliverable/Milestone details

This page contains the details of the given deliverable or milestone, including the estimated date, status and author(s) (top left) as well as more information and controls for the upload and review procedure (top right). The designated author of the document will see a “Waiting upload” sign next to their name, as well as an “Upload” and a “Delete” button. Scrolling down reveals a file preview (if allowed) and the changelog on the right. There is also a settings page to change the properties of the document such as name, delivery date, dissemination level, authors, etc., with the necessary permissions (access rights). If a document has already been uploaded, the interface

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changes to allow approval and rejection (see next section for details).

3.2.1 Document review process

A reminder is sent to the person responsible for the deliverable 1 month before deadline. The responsible person has to coordinate the contributions from the other partners. Once a deliverable is considered by the responsible author(s) as ready for review, they upload the finalised pdf version of the deliverable on the Workflow tool. The main author must also provide the abstract and the names of other contributors. Once this step has been completed, the WP leader will receive an automated email from the platform stating that the deliverable is available for review. The WP leader reviews the consistency and the technical content of the document. If modifications are necessary, the WP leader rejects the deliverable (providing comments explaining why). The platform will send an automated email to the main author, who will then make the necessary changes. This process will be repeated until the WP leader is satisfied with the deliverable and validates it. Once this happens, the author receives a notification of the approval, which is also sent to the coordinator, who is next in line to carry out the review. The coordinator reviews the consistency of the document. The procedure for the coordinator's review is the same as before (iterations of uploads, checks and rejections until the document is deemed satisfactory). Once the coordinator validates the document, it will be sent to LGI for one final check (quality check), after which it will be made available on the platform in the "Deliverables (final versions)" folder, and the coordinator will upload it to the Participant Portal (submitting it to the European Commission).

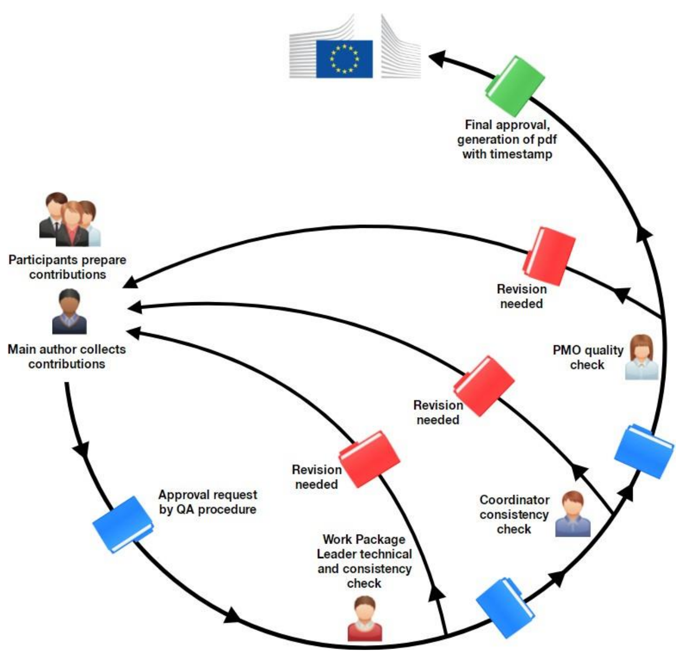

Figure 7: FLEXX platform quality assurance process

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2.3 User Directory

The User directory makes it easier to search for, get information about, and write emails to members of the consortium. It has the potential to replace currently used, localized tools (such as excel files) which exist locally on multiple computers, version control is sometimes challenging, user interaction is minimal or impossible, and GDPR compliance is not assured. The main User Directory screen is shown in Figure 8.

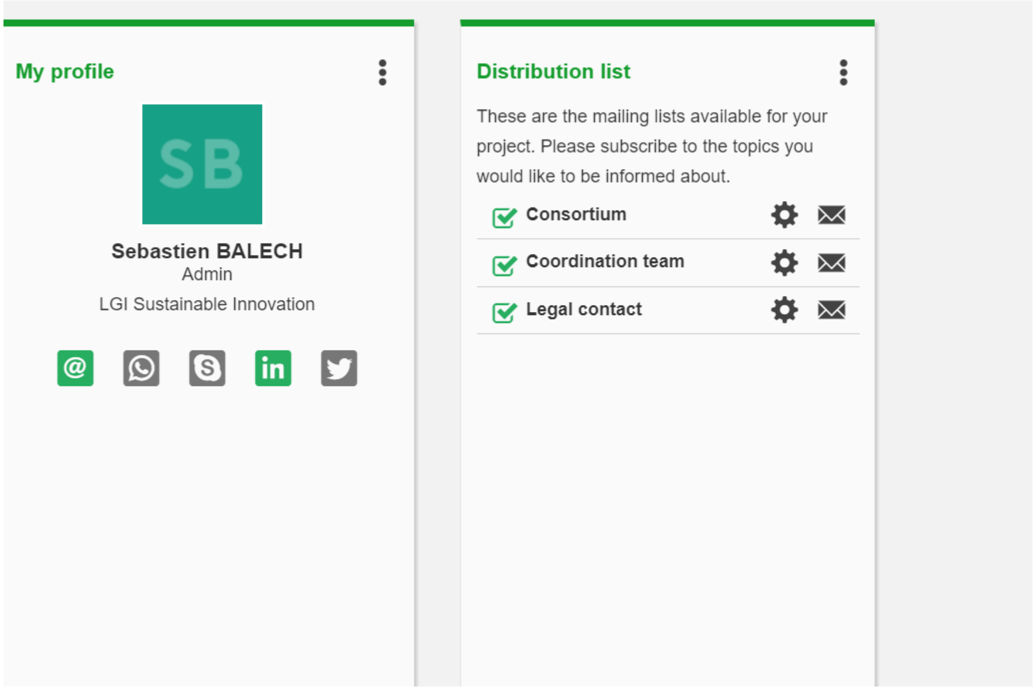

Figure 8: Main User Directory screen

A user profile is given on the left, which can be edited by clicking on the menu button (three vertical dots). This will be seen by other partners and used to contact any partner if necessary. Clicking on the menu button allows editing the user profile and to change the profile picture. Choosing to edit the profile will open the window in Figure 9.

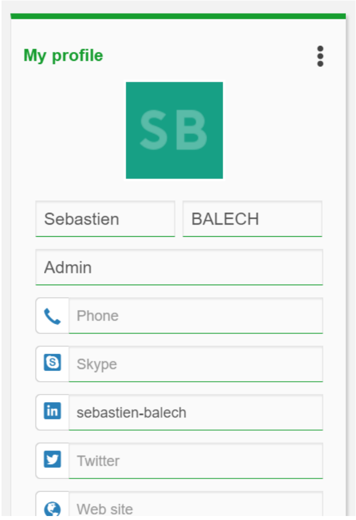

Figure 9: Profile editing screen

Here, contact information, as well as a short description about the user can be added. If someone searches for a given user in the online collaboration platform or wants to contact someone, this is what they will see. Adding a profile picture is also possible to make communication a little more personal (by default the profile picture consists of initials in front of a monochrome background).

Distribution lists for the project are shown on the right side of the main screen (Figure 8). Collaborators using the platform are able to send group messages by clicking on the envelope button, which opens a standard compose window with the email addresses already set (Figure 10).

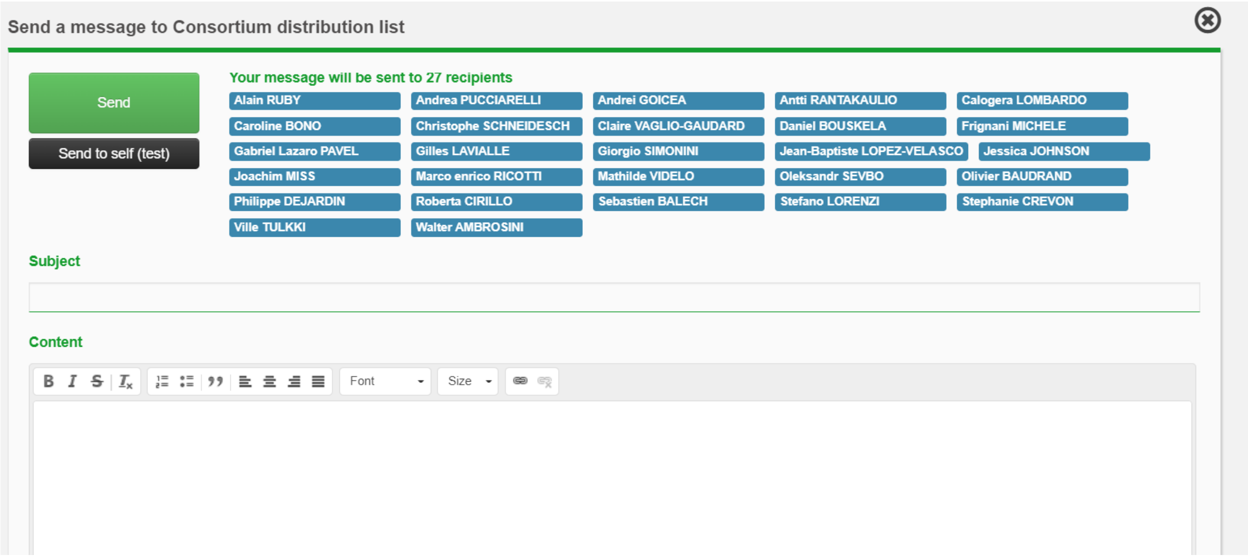

Figure 10: Compose window

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Users have access to a set of formatting tools and have the option to send the message to themselves as a test only. Scrolling down on the main User directory page gives the option to search for consortium members (Figure 11).

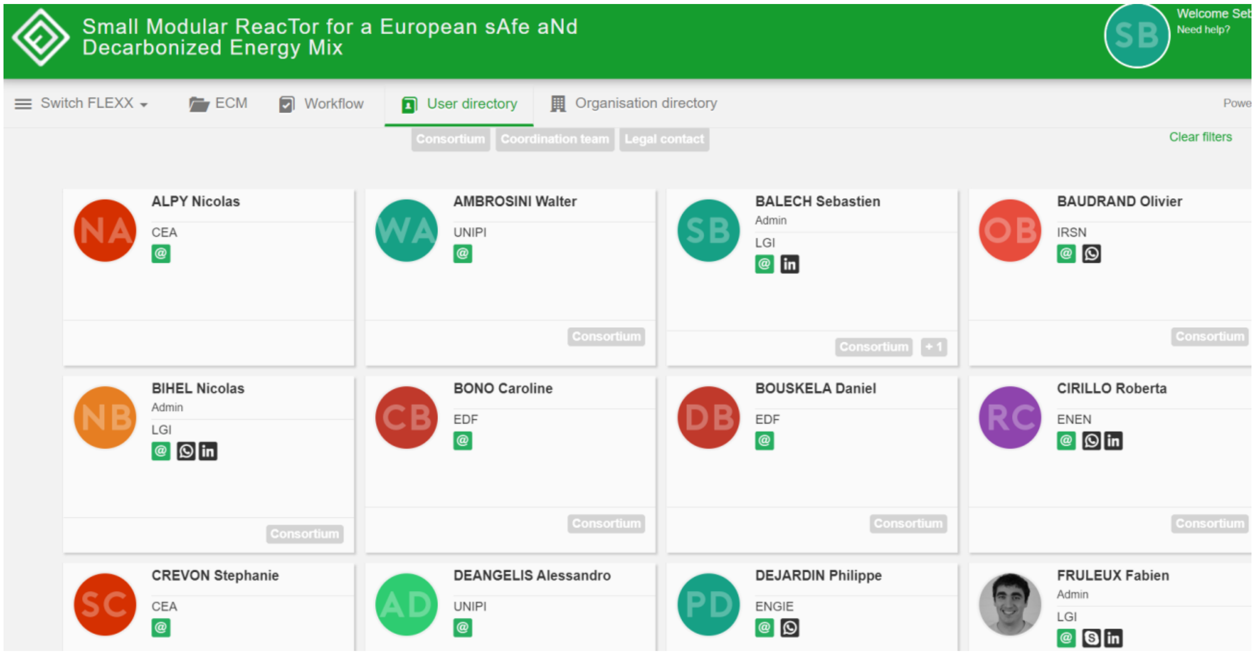

Figure 11: User list corresponding to the consortium members

The search field can be used to find specific users, or view all the users subscribed to a specific group by clicking on the group name (in grey highlight) just below the search field. Click on the @ on a user's card allows writing them an email. This will open a compose window using the default email client.

2.4 Definition of access rights for user groups

Access rights to the online management tool are defined in a granular manner, restricting access to certain areas of the workspace, depending on the user group, as necessary. At the project start, the following user groups are used (these may be expanded during the project if required):

1. Scientific Advisory Committee
2. Industrial User Group
3. Executive Committee
4. Governing Board
5. Consortium members

6. Workflow users (for partners that need to upload and/or approve deliverables or milestones)

The TANDEM web platform will evolve during the lifetime of the project with the inputs of all participants, and new features may be added by LGI according to the development pipeline.

3. Teams channel

For the day to day work on the project, a dedicated Teams channel was created and is hosted by LGI. The Teams channel server for Tandem is hosted in Europe.

All partners of the project were invited to access this channel. The structure of the channel will evolve with the project lifetime. The current one consists of a general subchannel, one sub-channel per work package and several private channels.

Partners are able to work collaboratively on documents in draft version, using the Sharepoint feature embedded on Teams.

This Teams channel will centralise the different documents used in the project, avoid transferring files via email and being compliant with GDPR.

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