EMI Project Processes and Tools

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Outline

- The Quality Assurance Plan

- Major Processes and Metrics

- Tools

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The Quality Assurance Plan

- Mandatory deliverable, due at PM1

- Describes how the project is managed and how it's progress and achievements are monitored and measured

- Strongly linked to the Consortium Agreement

- Not to be confused with the Software Quality Assurance Plan (SA2 deliverable at PM1)

QA Plan Contents

- List of processes:
  - Budget and effort reporting
  - Quarterly and periodic reporting
  - Deliverables and milestones monitoring and validation
  - Publications review and validation
- Supporting tools
- Information archiving and record keeping

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Budget

- Each partner must report the actual total (funded+unfunded) project expenditures at least every three months (monthly is better)

- They are reported and tracked using PPT

- They are reported to the EC in the Quarterly and Periodic reports

- Except for the Periodic Reports, the figures don't have to be 'official' or 'audited', but must be as close as possible to the real costs

Effort

- Each project member must report the consumed (funded+unfunded) effort every month

- They are reported and tracked using PPT

- They are reported to the EC in the Quarterly and Periodic reports

- Except for the Periodic Reports, the figures don't have to be 'official' or 'audited', but must be as close as possible to the real effort

Quarterly Reports

- Description of the project achievements and issues compared to the official program of work

- Produced three times per year

- Follow a standard template provided by the EC

- Process:
  - Each WP leader provides his/her contribution within 10 days after the end of the quarter
  - The EMI Project Office produces the overall report within 20 days after the end of the quarter and sends it to the PEB and the CB for verification and comments
  - QR is sent to the EC within 30 days after the end of the quarter

Periodic Report

- Description of the project achievements and issues compared to the official program of work over one full year (reporting period)

- Produced once per year (it's the fourth QR)

- Follow a standard template provided by the EC

- Process:
  - WP leaders provides contributions 20 days before the end of the period
  - The EMI PO produces the overall report by the end of the period and sends it to the PEB and the CB for verification and comments
  - Partners report estimated costs for the final quarter within 20 days from the end of the period, official cost claims within 45 days from the end of the period
  - Preliminary Report is sent to the EC within 10 days before the review. Final report within 60 days

Deliverables

- As per DoW

- To be submitted by the date (in PM) stated on the DoW

- Authors are known in advance (usually the WP or Task leaders)

- Reviewers are known in advance (at least three months)

Deliverables

- Process:
  - Author(s) sends TOC to PEB/reviewers within 30 days before the submission date
  - Author(s) sends draft to PEB/reviewers within 20 days before the submission date
  - Reviewers sends comments to Authors/PEB within 15 days before the submission date (twiki-based review form)
  - Author(s) sends final to PEB/reviewers within 10 days before the submission date
  - PEB sends authors notification of final acceptance or motivated rejection within 5 days before the submission date
  - If accepted PD sends deliverable to EC on submission date
  - If rejected, new iteration starts, EC is notified of delay

Milestones

- As per DoW

- To be submitted to the PEB by the date (in PM) stated on the DoW

- Authors are known in advanced (usually the WP or Task leaders)

- Process to be defined, similar to deliverables, but shorter/lighter

- Is the PEB acting as reviewer or need to appoint reviewers?

Publications

- Publication of 'project foreground' (results, achievements, discoveries) must be notified to the PEB
  - To assess its compliance with the quality standards
  - To allow NA2 to collect metrics on dissemination
- PEB can veto the publication of material in breach of the GA or CA
  - All authors have to be acknowledged
  - If previously unpublished material is used from parties other than the proposing authors, written consent must be obtained

Publications

- Must be released under Open Access and a copy stored in the EMI Document Repository (CDS/OpenAIRE)

- Must acknowledge the EC funding contribution under contract INFSO-RI-261611

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Project Management

- Tasks, deliverables, milestones and major planning items are monitored using an open source project management tool called Project.net

- The EMI instance is available at:

  https://emiproject.cern.ch/pnet

  - Used by default by the members of the PEB and PTB, WP and Task Leaders, but anybody can request an account to access the application to view or edit data

Collaborative Tools

- Mailing lists have been created:
  - all-members@eu-emi.eu
  - [cb|ecb|peb|ptb|emt|nax|sax|jrax]@eu-emi.eu
- Project web site: http://www.eu-emi.eu
- Twitter: http://twitter.com/emiproject
- Twiki? A global one, one per activity?
- Documents: CDS/OpenAIRE
- Conf call: CERN Audioconf for most regular meetings

Budget and Effort

- Project Progress Tracking (PPT)
- See Michal demo

European Middleware Initiative

Thank you

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