

Idea2Enterprise

Configuration Management Plan

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1. Introduction

1.1 Objective

The goal of the configuration management process is to define procedures how and where work products (documents, studies, templates etc.) are stored.

1.2 Purpose of the Deliverable

To support the configuration management process all procedures, guides and templates are defined in the configuration management plan.

1.3 Scope of the Deliverable

The configuration management plan includes:

- Instructions how to work with the NQA system and check in/check out documents
- Definition of different document status (draft, reviewed, approved)
- Distribution list according to working scenarios
- List and location of defined templates
- List of expected work products

1.4 Target Audience

The target audience of this deliverable are the project partners and the project officer from the national agency.

1.5 Use Acronyms and Definitions

Acronym	Description
ISO	International Standardisation Organisation

2. NQA Teamwork Server

2.1 Introduction

In the TEAMWORK (IST-2000-28162, 2001-2003) project ISCN developed a best practice scenario and an e-working platform for quality management in distributed projects including best practices for EU projects. The system allows

- To agree collaboration scenarios and support them over the Internet
- To share materials in a common knowledge base
- To control versions of materials and submissions among team members online
- To discuss different issues online and record all discussions
- etc.

NQA is an online collaboration tool, which supports and helps to improve team work. Different project types and then structures are already defined in this system and new projects inherit the structure of these definitions. The project partners are assigned to project roles, where one role can fill from more partners of different organisations. The roles include different responsibilities for different tasks (or results) building a constant workflow. This workflow has the needed deliverable as an end-product.

The main point of this plan is to allow partners to concentrate on staff and resources, rather than on deliverables. Projects on the other side are further divided into work packages or scenarios. The project control will be done by the e-working infrastructure, so called Overall Project Planning scenarios. This allows the co-ordinator and the EU reviewer to access and review actual plans online.

On a quarter annual basis the project co-ordinator will review the project status and initiate corrective actions.

If required, the system allows online access and submission of results to EU officers.

2.2 System Requirements

The NQA Teamwork Portal does not require any user-side installation. NQA works with standard browsers: Microsoft Internet Explorer 7.0 and up, Mozilla Firefox 3.0 and up, Safari newer than 4.0, Opera 10 and up and Google Chrome. Users receive their user account information from the administrator and log-in to the system to use its functionalities.

2.3 Access and Users Guide

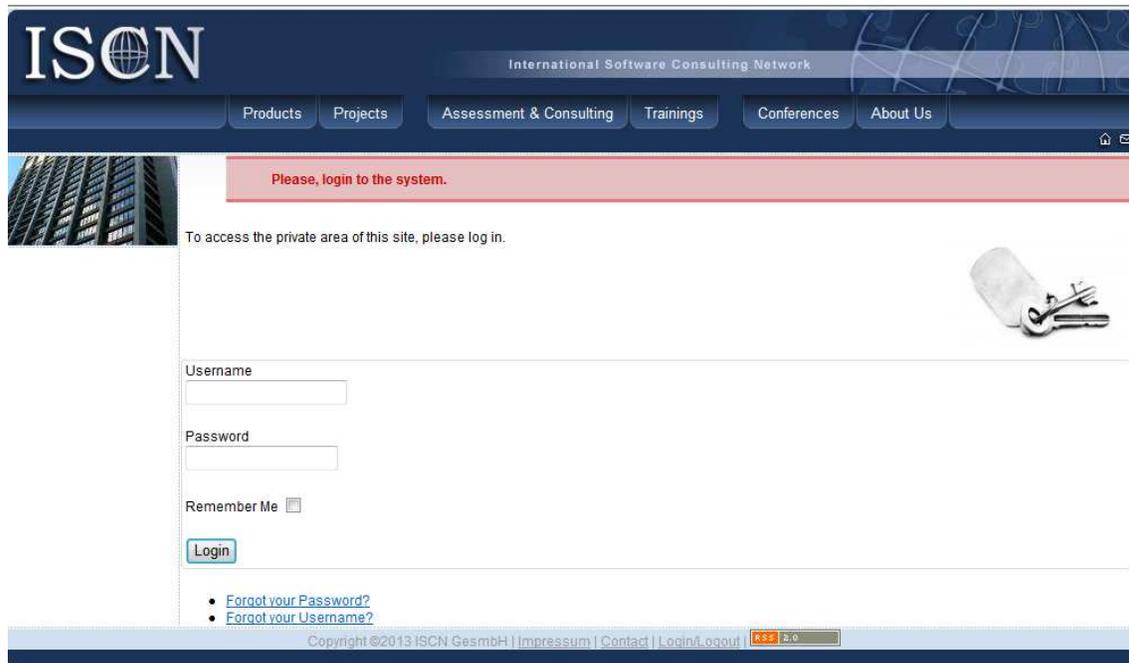
The link for the NQA Teamwork Portal is

<http://www.nqa.cc>

A login screen appears where users can enter their usernames and passwords. If partners need additional accounts for their organisation, they should send a request to Mihail Milev (mmilev@iscn.com).

Through the on-screen top menu users have access to several functionalities. The first one is the **NQA2 system**, which is present through a table containing different projects to which the user is assigned. Second option is the **NQA2 File Manager**. Users know this part of the system as "Additional Documents" from previous NQA versions. This part offers a full-featured virtual file system for the creation of folders, sharing and linking of files, and linking files with project documents.

"My Account" allows the user to change his username, password and other personal information. The last option is a redirect to the login/logout screen. We highly suggest that users use the logout finishing their work. Due to this are no ways for third-party users to access important and/or confidential project information.



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Please, login to the system.

To access the private area of this site, please log in.

Username
Password

Remember Me

Login

- [Forgot your Password?](#)
- [Forgot your Username?](#)

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Figure 1: NQA2 Log in screen

2.4 Structure

A project contains a number of defined working scenarios. Working scenarios define document templates (for results to describe), roles (to be filled by users) and document flows (defined by submission lists). Projects are related to so called project types. The project type can be described as a re-usable structure, which outlines all scenarios, documents, roles and document flows. Once the user creates a project of a certain type it automatically receives the defined structure.

The screenshot displays the 'From Idea to Enterprise' project structure. At the top, there are navigation links for 'HOME' and 'FROM IDEA TO ENTERPRISE'. Below this, a project information box contains the following details:

- Project Number:** CZ/12/LLP-LdV/TOI/134007
- Project Type:** Leonardo Pilot Planning
- Abbreviation:** Idea2Enterprise
- Description:** The proposed project aims at delivering to innovative young minds the qualification to turn their product and service ideas into an enterprise in a successful and sustainable manner.

Below the information box are four buttons: 'Project Log', 'Project Calendar', 'Add Document Type', and 'Enter Discussion Forum'. To the left is a file tree structure:

- From Idea to Enterprise
 - Overall Project Planning Scenario
 - Overall Effort Reporting Scenario
 - Templates
 - Additional Documents
 - Workpackages

The main content area features a 'Fast document publish' section with a 'Document type:' dropdown menu (set to '-- Please, select --'), a 'Select file:' input field with a 'Browse...' button, and an 'Upload' button. Below this is a 'Download whole project documentation' section with a 'Download project documentation' button.

Figure 2: NQA2 Project Structure

The structure generated for the SIMS Project is based on the best practice Life Long Learning project type with the following scenarios:

Project Management:

- Project Proposal
- Project Plan
- Budget Plan
- Project Status
 - All documents reflecting the current project status
- Meeting Documentation
 - Meeting Minutes and Meeting Agenda
- Project Communication and Working Environment
 - Communication Plan

Project Administration Reporting

- Administrative Documents
 - Official documents such as Project Handbook, Reporting Template, FAQ from the LLP Programme etc.
- Mid-Term Report
 - Mid-Term or Progress Report
- Mid-Term Cost Reporting
 - Effort and Cost Reports per Partner
- Final Report
 - Final Report
- Final Cost Reporting
 - Effort and Cost Report per Partner

Additional Documents Folder

Work packages Folder

Figure 3: Example for the Project Management scenario

2.5 Additional Documents Folder

The additional documents folder serves as storage for all kind of documents which can be directly linked to one of the scenarios. Usually the folder contains:

- Templates (PowerPoint template for learning materials, template for multiple-choice test questions etc.)
- Logo of the project in different sizes
- Presentations from meetings
- etc.

2.6 Working with Deliverables

2.6.1 Publishing Documents

Click on the **Publish** button to publish a **new** document. To publish a new version from the same document use the „**Publish New Version**“ function described in chapter 2.6.3.

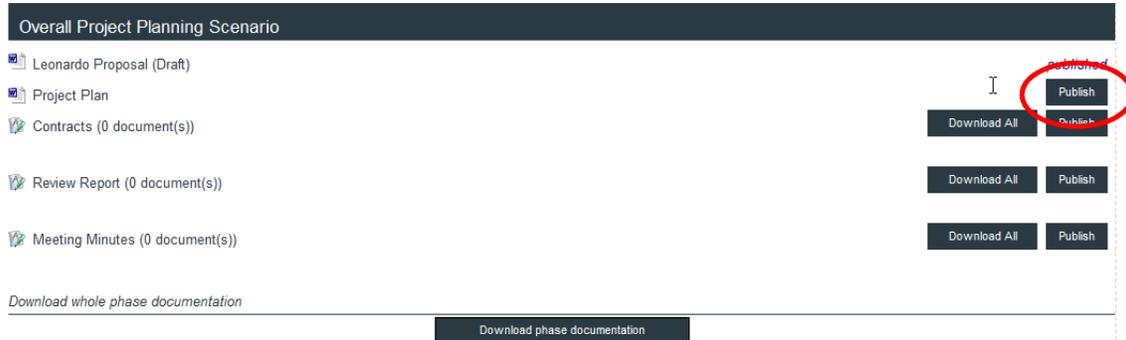


Figure 4: Publish deliverable

In some cases there is also a template associated with the deliverable, which can be downloaded. These templates serve as a unification of documents for specific projects.



Figure 5: Upload document

For uploading a new document select a file from your local computer, enter the document title and click on the **Upload** button. Your document is now uploaded.



Figure 6: Select file and enter document title

From Idea to Enterprise HOME FROM IDEA TO ENTERPRISE

Project Number: CZ/12/LLP-LdV/TOW/134007
 Project Type: Leonardo Pilot Planning
 Abbreviation: Idea2Enterprise
 Description: The proposed project aims at delivering to innovative young minds the qualification to turn their product and service ideas into an enterprise in a successful and sustainable manner.

Project Log Project Calendar Add Document Type Enter Discussion Forum

Sort reports by: :: Name :: URL Alphabetically :: Last Modification

- From Idea to Enterprise
 - Overall Project Planning Scenario
 - Leonardo Proposal
 - Project Plan
 - Contracts
 - Review Report
 - Meeting Minutes
 - Overall Effort Reporting Scenario
 - Effort Report
 - Templates
 - Additional Documents
 - Workpackages
 - Idea2Enterprise WP4 - Needs Analy...
 - Idea2Enterprise WP5 - Transfer ot...
 - Idea2Enterprise WP6 - Transfer an...
 - Idea2Enterprise WP7 - Transfer of...
 - Idea2Enterprise WP8 - Broad Disse...
 - Idea2Enterprise WP9 - Trainings a...

Overall Project Planning Scenario

Meeting Minutes (1 document(s)) Download All Publish

Agenda Kick Off Meeting [leo_pilot_minutes.1] (Draft)

Download whole phase documentation

Download phase documentation

Figure 7: Uploaded Document

2.6.2 Open Documents

Click on the title of the document and select **Download** to download or open a document

Sort reports by: :: Name :: URL Alphabetically :: Last Modification

- From Idea to Enterprise
 - Overall Project Planning Scenario
 - Leonardo Proposal
 - Project Plan
 - Contracts
 - Review Report
 - Meeting Minutes
 - Overall Effort Reporting Scenario
 - Effort Report
 - Templates
 - Additional Documents
 - Workpackages
 - Idea2Enterprise WP4 - Needs Analy...
 - Idea2Enterprise WP5 - Transfer ot...
 - Idea2Enterprise WP6 - Transfer an...
 - Idea2Enterprise WP7 - Transfer of...
 - Idea2Enterprise WP8 - Broad Disse...
 - Idea2Enterprise WP9 - Trainings a...
 - Idea2Enterprise WP3 - Configurati...
 - Idea2Enterprise WP2 - Quality Man...

Overall Project Planning Scenario

Meeting Minutes (1 document(s)) Download All Publish

Agenda Kick Off Meeting [leo_pilot_minutes.1] (Draft)

Download phase documentation

Download phase documentation

Figure 8: Download or open document

2.6.3 Edit Documents or document titles

Click on the title of the document and select **Edit** to edit a document or the document title. Documents can be edited in two ways: If the uploaded document is online editable a HTML editor opens for online editing. In all other cases users have to download the current version of the file and edit it locally and upload the new version.

In general users should **always** use the **Publish New Version** function to upload new versions of the same document. With the **Version List** function users can access older version of the document and track changes.

View document

HOME FROM IDEA TO ENTERPRISE OVERALL PROJECT PLANNING SCENARIO MEETING MINUTES

Send Notification Edit Document Title

Revision Control: checked in :: Link to Document :: Version List :: Publish New Version

Last document change: Mihail Milev - Wed, 09 Jan 2013 11:49:24, GMT+1

Document Status: Draft -- Change Status --

Public Document:

Status changed by: Mihail Milev - Wed, 09 Jan 2013 11:49:24, GMT+1

Download current version of LEO_PILOT_MINUTES.1 "Agenda Kick Off Meeting" [agenda_kick_off_meeting_i2e.pdf]

Linked documents: (none)

Linked files: (none)

Figure 9: Edit document

Edit Document "Meeting Minutes" for project "From Idea to Enterprise"

Upload a file from your computer

Edit current file online, using HTML editor

There is a template associated with this document. Please, click here to download it, edit it on your computer and then upload it to the server.

<< Back Next >>

Figure 10: Publish new version

The following additional functions are also available:

- **Send Notification** per e-mail to all (or selected) users about a change in the document. The document itself is not send.
- **Change the status** of the document.
- **Link the document** with other documents to create a bidirectional link.

2.7 Working with Work Packages

Each project is divided into work packages, which produce and include one or more deliverables (e.g. Project Management – Contracts – Contracts of Partners). Click on the **Workpackages** link to browse through the work packages and open or publish documents.

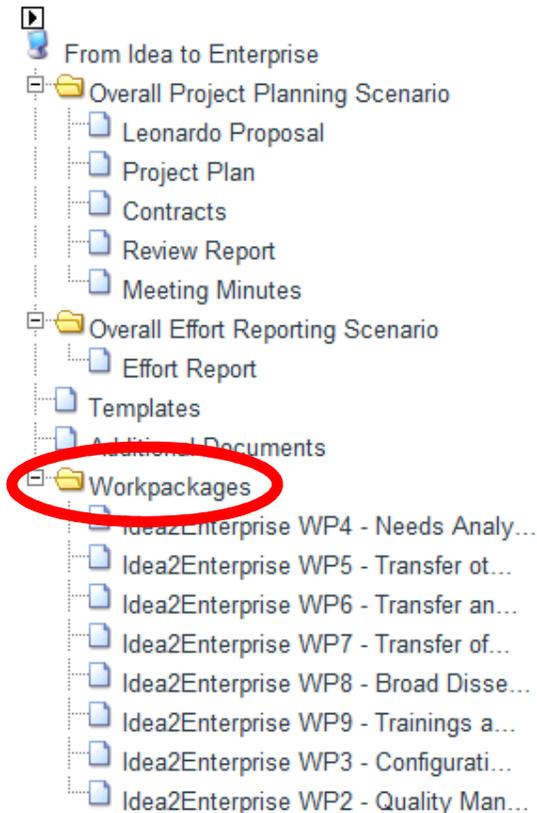


Figure 11: Link to work packages

2.7.1 Work packages for IDEA2ENTERPRISE project

A list of work packages for the IDEA2ENTERPRISE project appears (see Figure 12). By clicking on a work package you will be automatically forwarded to the document area of each work package.



Figure 12: List of work packages

In the project the following work packages and deliverables were agreed:

1. Project Management

- 1-001 - Project Management Plan
- 1-002 - Web based Project collaboration
- 1-003 - Project Administration

2. Quality management

- 2-001 - Quality Management Plan
- 2-002 - Review Reports
- 2-003 - Training Analysis

3. Configuration management

- 3-001 - Configuration Management

4. Transfer of Skill Set

- 4-001 - Need Analysis
- 4-002 - Translated and Configured Skill Set

5. Transfer of Learning Materials

- 5-001 - Refined and Translated Training Material

6. Transfer and Configuration of the Online Learning Course

- 6-001 - Online course

7. Transfer of the Certification and Examination Shema based on the ECQA framework

- 7-001 - ECQA Exam Question Database

8. Broad Dissemination

- 8-001 - Dissemination and marketing plan
- 8-002 - Marketing, Publishing and Conferences

9. Trainings and Exploitation

- 9-001 - Training of Trainers
- 9-002 - Student Training
- 9-003 - Exploitation Plan

Deliverables from work package 1 are stored in the scenario Project Management (see 2.4 Structure). Each other deliverable should be stored in the related work packages.

2.7.2 Example: Publishing WP3 Deliverables

The procedure to publish a **new** document is the same as already described in chapter 2.6.1. The name of the deliverable should be the same as in the proposal including the number of the deliverable; e.g. **3-001-Configuration Management Plan**:

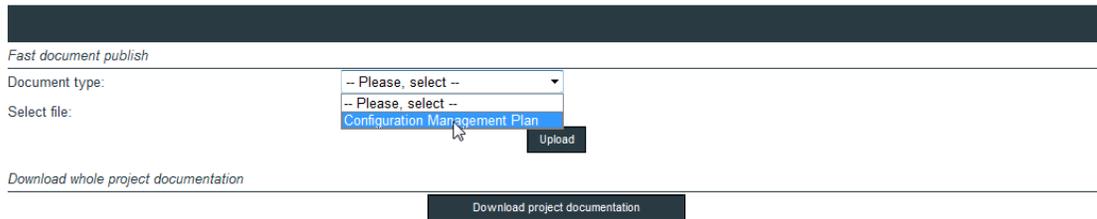


Figure 13: Select the Document Type

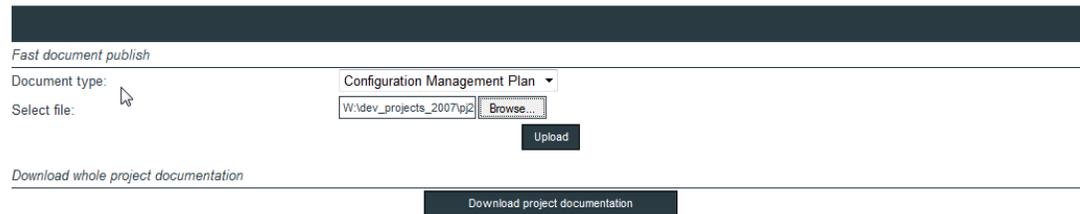


Figure 14: Select the File on your Computer

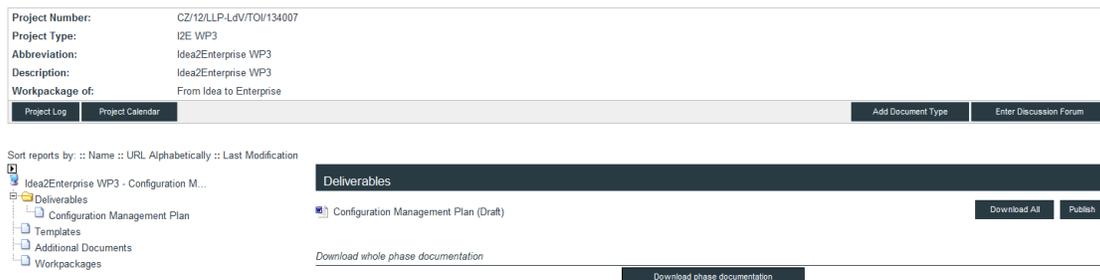


Figure 15: Uploaded document

Or if each partner will publish its own element e.g. for Skill Cards:

4-001 IDEA2ENTERPRISE Skill Card – U1.E2 Element Name – Partner Name

2.8 Change Password

Select "**Home**" from the top menu and then "**My Profile**" and enter a new password to change your user password or edit your user details.

The screenshot displays the 'From Idea to Enterprise' project page. At the top, a navigation bar includes a 'HOME' link circled in red. Below the navigation bar, project details are shown: Project Number (CZ/12/LLP-LdV/TOI/134007), Project Type (I2E WP1), Abbreviation (Idea2Enterprise), and Description. A sidebar on the left lists project documents like 'Leonardo Proposal', 'Project Plan', and 'Contracts'. The main content area features a 'Fast document publish' section with a document type dropdown, a file selection field, and an 'Upload' button. Below this is a 'Download whole project documentation' section with a 'Download project documentation' button. At the bottom, a user profile bar displays 'Welcome, Damjan Ekert' with links for 'MyProfile' and 'Logout'.

Figure 16: Change password

3. EU Visibility: Lifelong learning logo and text

Each publication or result produced in the IDEA2ENTERPRISE project and co-founded by the EU must include the official logo for the programme:



Download the logo in different format form the following link:

http://ec.europa.eu/dgs/education_culture/publ/graphics/img/progr-lifelong-tif.zip

In addition the following text has to be used (in Tahoma) in different documents:

“This project has been funded with support from the European Commission.
This publication [communication] reflects the views only of the author, and the
Commission cannot be held responsible for any use which may be made of the
information contained therein.”

More Information about the EU visibility and graphical identity please find here:

http://ec.europa.eu/dgs/education_culture/publ/graphics/identity_en.html