Deliverable D1.1

Project Management Handbook

Workpackage: WP1 – Coordination and Management

Authors: Eric Robson (WIT – TSSG)

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# OPENi Project Profile

**Contract No.:** FP7-ICT-317883

<table>
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<th>Acronym:</th>
<th>OPENi</th>
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<tr>
<td><strong>Title:</strong></td>
<td>Open-Source, Web-Based, Framework for Integrating Applications with Social Media Services and Personal Cloudlets</td>
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<tr>
<td><strong>URL:</strong></td>
<td><a href="http://www.openi-ict.eu">www.openi-ict.eu</a></td>
</tr>
<tr>
<td><strong>Start Date:</strong></td>
<td>01/10/2012</td>
</tr>
<tr>
<td><strong>Duration:</strong></td>
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## Partners

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<tr>
<td>National Technical University of Athens (NTUA), Decision Support Systems Laboratory, DSSLab</td>
<td>Greece</td>
</tr>
<tr>
<td>Fraunhofer-Gesellschaft Zur Foerderung Der Angewandten Forschung E.V</td>
<td>Germany</td>
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<tr>
<td>INFORMATICA GESFOR SA (CGI)</td>
<td>Spain</td>
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<tr>
<td>AMBIESENSE LTD</td>
<td>UK</td>
</tr>
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<td>Velti Anonymos Etairia Proionton Logismikou &amp; Synafon Proionton &amp; Ypiresion</td>
<td>Greece</td>
</tr>
<tr>
<td>BETAPOND LIMITED</td>
<td>Ireland</td>
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Document History

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<th>Author (Partner)</th>
<th>Remarks</th>
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<td>Eric Robson(TSSG)</td>
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<td>31-01-2013</td>
<td>Eric Robson(TSSG)</td>
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Executive Summary

This document provides the overall guidelines and procedures for the OPENi project. It is to be used as the main source of administration related issues within the project. This document builds on many of the guidelines and procedures from the grant and consortium agreements and attempts to define a practical approach to their implementation.
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1 Introduction

This document is structured to follow the core administrative functions of the project. It is to be used as the reference manual for all administrative issues within the OPENi project. In the instance where a contradiction arises between this document and either the grant agreement (GA) or the consortium agreement (CA) – the latter documents take precedent.
2 Project Management

2.1 Project Management Structure (WPs)

The OPENi project activities are distributed into 7 Work Packages (WPs), each one with a defined scope and objective. The following diagram, from the Description of Work, shows the project management structure and communication/decision-making channels for the project.
2.2 Project Organisation

The table below provides an overview of the project organisation, and where appropriate provides contact details for project participants.

<table>
<thead>
<tr>
<th>Role</th>
<th>Person(s)</th>
<th>Email(s)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Coordinator</td>
<td>Eric Robson</td>
<td><a href="mailto:erobson@tssg.org">erobson@tssg.org</a></td>
<td></td>
</tr>
<tr>
<td>Technical Coordinator</td>
<td>Dónal McCarthy</td>
<td><a href="mailto:dmccarthy@tssg.org">dmccarthy@tssg.org</a></td>
<td></td>
</tr>
<tr>
<td>Dissemination Manager</td>
<td>Fenareti Lampathaki</td>
<td><a href="mailto:flamp@epu.ntua.gr">flamp@epu.ntua.gr</a></td>
<td></td>
</tr>
<tr>
<td>Exploitation Manager</td>
<td>Giannis Katsaros</td>
<td><a href="mailto:gkatsaros@velti.com">gkatsaros@velti.com</a></td>
<td></td>
</tr>
<tr>
<td>WP1 Leader</td>
<td>Eric Robson</td>
<td>As above</td>
<td></td>
</tr>
<tr>
<td>WP2 Leader</td>
<td>Fenareti Lampathaki</td>
<td>As Above</td>
<td></td>
</tr>
<tr>
<td>WP3 Leader</td>
<td>Dónal McCarthy</td>
<td>As above</td>
<td></td>
</tr>
<tr>
<td>WP4 Leader</td>
<td>Robert Kleinfeld</td>
<td><a href="mailto:robert.kleinfeld@fokus.fraunhofer.de">robert.kleinfeld@fokus.fraunhofer.de</a></td>
<td></td>
</tr>
<tr>
<td>WP5 Leader</td>
<td>Claudia Villalonga</td>
<td><a href="mailto:claudia.villalonga@logica.com">claudia.villalonga@logica.com</a></td>
<td></td>
</tr>
<tr>
<td>WP6 Leader</td>
<td>Theodoros Michalareas</td>
<td><a href="mailto:tmichalareas@velti.com">tmichalareas@velti.com</a></td>
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<tr>
<td>WP7 Leader</td>
<td>Fenareti Lampathaki</td>
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</tr>
</tbody>
</table>

In addition a complete Project Contacts list is maintained within the project wiki.

2.3 Decision Making

In general, it is expected that the instructions of the overall coordinating tasks (i.e. WP1) will be followed by the workpackages concerned, or that conflicting views will be resolved bilaterally. In the exceptional case that conflicts cannot be resolved on workpackage level, the technical board may be called by the respective workpackage leader and asked to resolve the conflict. It is expected that the coordinator will consult the workpackages concerned before making any decision and especially ensure that no unnecessary overhead is generated. The goals and thus the metric for the coordinator task are always to improve the overall functioning of the project and to improve the quality, consistency and impact of the project results. If the Technical Board is unable to provide an acceptable decision for a conflict, the case must be brought to the project Board or general assembly (GA). The GA will make a final decision, if necessary, by weighted voting. This decision is then binding on project participants. The technical board will be in charge of ensuring that all pending conflicts will be resolved within reasonable time frames. Please refer to the consortium agreement (http://gitlab.openi-ict.eu/openi/tree/master/ProjectAdmin/Contracts/ConsoritumAgreement/OPENi_Consortium_Agreeme
(nt.docx) for further details. Detailed descriptions of meeting mechanisms are provided in the consortium agreement. Section 3.2 and 3.3

2.4 Project Planning and Timetable

The complete GANTT chart for the project can be seen in the Description of Work and in a separate file in GitLab:
http://gitlab.openi-ict.eu/openi/tree/master/ProjectAdmin/ProjectManagement/ProjectPlan/OPENiProjectPlan.xlsx
### 3 Communication and Collaboration Tools

The OPENI project uses many forms of communication; these are documented in later sections of this deliverable:

- Email lists - on a WP level
- Regular meetings / audio conferences
- GITlab for documents, software and models (https://gitlab.openi-ict.eu/)
- Social network sites
  - Facebook [https://www.facebook.com/ictopeni](https://www.facebook.com/ictopeni)
  - Twitter [http://twitter.com/openi_ict](http://twitter.com/openi_ict)
- Instant Messaging - Skype is the application of choice within the consortium

#### 3.1 Meetings/ACs

The project will hold 3-4 project meetings per year at various suitable locations, preferably associated with partner sites. Each meeting will encompass several different types of meeting (Board, Technical, Plenary) in consecutive sessions in order to save as much on travel expenses as possible. These meetings will cover all the work of the project and will include a review of progress in each work package/task and detailed planning of the future direction of the project.

Interim technical meetings will be held as required within specific work packages. These will be organised by the leaders of the work packages and tasks involved. In normal circumstances, full use will be made of technology to support cooperative working and minimise travel time. This will include wider use of e-mail, web/wiki and conferencing tools, quarterly progress reporting from all partners to the Project Coordinator, and the distribution of the consolidated reports back from the Project Coordinator to all partners.

Details will be exchanged between partners working in the same area through regular e-mail/wiki contact and during work package meetings. Details will be also exchanged between partners working in different work packages, again by e-mail/wiki and project and technical meetings. The Project Board will normally meet physically 2-3 times per year and these meetings will be held in conjunction with Plenary Consortium or Technical meetings.

Regular audio conferences will be used to monitor project progress, and to progress technical discussions. Meeting minutes will be stored in the appropriate location on the project wiki (for general meetings) and in subversion (for confidential board meetings).

Detailed descriptions of decision making mechanisms are provided in the consortium agreement. Section 3.2 and 3.3

#### 3.2 Email lists

A number of email lists have been created for the OPENI project, as listed below.

<table>
<thead>
<tr>
<th>List email address</th>
<th>Description</th>
<th>Subscription page</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:Openi_all@listserv.tssg.org">Openi_all@listserv.tssg.org</a></td>
<td>All project members and contributors</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:Openi_mgmt@listserv.tssg.org">Openi_mgmt@listserv.tssg.org</a></td>
<td>The Project Board (or General Assembly)</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:Openi_wp2@listserv.tssg.org">Openi_wp2@listserv.tssg.org</a></td>
<td>All WP2 members, for discussion of WP2 related topics</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:Openi_wp3@listserv.tssg.org">Openi_wp3@listserv.tssg.org</a></td>
<td>All WP3 members, for discussion of WP3 related topics</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:Openi_wp4@listserv.tssg.org">Openi_wp4@listserv.tssg.org</a></td>
<td>All WP4 members, for discussion of WP4 related topics</td>
<td></td>
</tr>
<tr>
<td><a href="mailto:Openi_wp5@listserv.tssg.org">Openi_wp5@listserv.tssg.org</a></td>
<td>All WP5 members, for discussion of WP5 related topics</td>
<td></td>
</tr>
</tbody>
</table>
### 3.3 Instant Messaging

Skype is the instant messaging product currently being used by the OPENI project. Download Skype from www.skype.com ([http://www.skype.com/](http://www.skype.com/)).

### 3.4 Redmine

The OPENI redmine installation (including wiki) is the main internal communication tool for the OPENI project.

#### 3.4.1 Guide to Redmine

Redmine has been installed on an server in the TSSG's data centre it can be accessed at ([https://redmine.openi-ict.eu](https://redmine.openi-ict.eu)). You should have already received a separate email with your login credentials, please contact the technical coordinator if you haven't.

#### 3.4.2 Project structure

I created an OPENi project ([https://redmine.openi-ict.eu/projects/openi](https://redmine.openi-ict.eu/projects/openi)) with sub-projects for each of the work packages WP2-6. Under each Work package I added the headline tasks from the DOW/Extended Project Plan, I added some information like the Task leaders and contributors and the start/end dates ([https://redmine.openi-ict.eu/projects/openi/issues/gantt](https://redmine.openi-ict.eu/projects/openi/issues/gantt)) to each task. If you are adding a user story or a bug report please make sure it is a subtask of a Task.

Notes: When assigning a Leader and contributors to the Work Packages/Tasks I selected one person from the appropriate group (as outlined in the Extended Project Plan), feel free to reassign the task to other members within your group. Some tasks appear twice as if they are duplicates but they are not, according to the DOW some tasks are undertaken in two phases with a break between the two, they easiest way to convey this on redmine was to create two separate tasks. The two tasks have the same name but have different numbers.

#### 3.4.3 Wikis

Even though each project and subproject can have a Wikis I disabled all but the root projects (OPENi) wiki ([https://redmine.openi-ict.eu/projects/openi/wiki](https://redmine.openi-ict.eu/projects/openi/wiki)) to prevent fragmentation. I also disabled the wiki on gitlab for this reason.

#### 3.4.4 Calendar

Redmine also provides a calendaring facility where the key events from each task can be logged to.

#### 3.4.5 Guide

If you are unfamiliar with Redmine a good guide can be found here ([http://www.redmine.org/guide](http://www.redmine.org/guide)).

### 3.5 Documentation and Source Code Repository

A GitLab repository has been created for the OPENI project. It is a secure repository accessible only by authenticated project participants. The repository is used to store all documentation and source code pertaining to the OPENI project. OPENi is an open source project; however certain project
documents need to remain private to the consortium (for example project management and administration documents). Access to the source code for the project has been initially restricted to the project consortium. This was deemed necessary until a critical mass of technology has been produced without external interference. The repository has been structured with this in mind – where by the relevant areas of the repository will be migrated to the public GitHub.

The repository can be accessed in many ways, for example:
1) Web interface: Using the web interface, project participants can gain read-only access to the repository. The URL to be used is: http://gitlab.openi-ict.eu/
2) Using a GitLab repository browser. An authenticated user can gain read and write access to the repository by using tools such as Git-scm (git-scm.com)

3.5.1 Gitlab Beginners Guide
The OPENi repository is a private install of GitLab, accessible at http://gitlab.openi-ict.eu/.

1. username is your email address in full e.g. lgriffin@tssg.org
2. password has been emailed to you
3. Upon successful login. mouse over the image in the top right and click my profile
4. Go to account and change your password
5. Optionally change your display name e.g. lgriffin was changed to Leigh for readability
6. Click SSH Keys and click add new

Gitlab has two layers of security. Outside of the initial login to the website, to contribute to a project and add data you authenticate via SSH. To generate your SSH key follow the instructions on:

http://gitlab.openi-ict.eu/help/ssh

It is recommended to add a password to the SSH key for a third and final security layer.

3.5.2 Installing git:
Download and install the latest version of git from:
http://git-scm.com/downloads
Depending on your operating system, you will now have a GUI view into git repositories but more importantly you will have access to the git environment from the command line. As a first time user of git I would strongly encourage you to learn the command line interface first. I cannot give specific help on the GUI, the documentation on the git site as well as instructional videos on youtube are excellent sources of information.

In the command line, navigate to the desired directory and run the following commands:

```
git config --global user.name "lgriffin"
git config --global user.email "lgriffin@tssg.org"
```
(replacing my username and my email address with your own)

```
git clone http://gitlab.openi-ict.eu/openi
```
You will be prompted for your username and password, which is the username and password provided above. This will initialise a git repository called openi, pulling down the latest versions of all the files and the structure associated with it.

I would recommend looking at and printing http://cheat.errtheblog.com/s/git
The main commands you will require encounter are: clone, add, rm, push, pull

3.5.3 Adding a file to git:
Within the openi folder, place the file you wish to add into the desired folder. If you create a new folder or subfolders and add the file there, it will automatically replicate the structure when you commit. From the command line run the following commands:

```
git add <filename>
```
Where filename is the name of the file to add or the folder to add. In the case of the folder this marks all files within the folder and subfolders for addition.
git commit -m "A meaningful commit message"
Please ensure that the commit message makes sense so we have a visible log of what each change is.

git remote add origin git@gitlab.openi-ict.eu:openi.git
This informs the git program files on your machine that you want your tagged change within your copy added to the original stored on the server. Generally this only needs to be run once.

git push -u origin master
This is the final push to the master repository. In time I might add branches off of this for milestones such as Scenario milestones but for now we will use the master. Upon initiating this, you will have to authenticate your SSH key with a password. When you established your SSH key you optionally chose a password to associate with it, that is the final security layer.

### 3.5.4 Updating a file in git:
To update a file in git simply edit the file on your machine. When you are happy to commit the changes the same process as adding a new file is followed. Mark the file for addition, commit it with a message and push your repository to the server.

```bash
  git add <file>
  git commit -m "My message"
  git push -u origin master
```
If you get a message saying that your view of the repository is out of date, it means that somebody has updated the repository since you last pulled the repository down. Simply run:

```bash
git pull
```
This will pull down the latest view of the repository. This will not affect the changes you are about to push, if a conflict occurs you will be informed of such and can view a diff of the files. This allows you compare changes side by side.

### 3.5.5 Additional Info:
Viewing previous versions is a matter of clicking on the commits tab. This will show you all previous commits and the associate comments. If you browse the code you will see a snapshot of the repository at that time, allowing you see previous versions. If you click on the hexidecimal code to the left of the commit, you will see details as to what files were added, modified or deleted.

Any comments or concerns please email Leigh (lgriffin@tssg.org) directly.
4 Intellectual Property Management and Publicity

4.1 Access rights
See Consortium Agreement section 4.2

4.2 Open Source Software
The OPENI project intends to release all platform software and user trial services developed within the project as open source (http://www.opensource.org/docs/osd). This does not apply to existing software that project partners plan to bring into the project, and extensions to be developed thereof, which will be integrated with the developed open source components. The process of becoming open source includes, and is dependent on the outcome of, the internal processes of some industrial partners for IP approval. The open source licenses used will be commercially friendly and non-viral licenses such as BSD (http://www.opensource.org/licenses/bsd-license.php) or Apache License, Version 2.0 (http://www.opensource.org/licenses/apache2.0.php). The exact license used for the distribution of software will be dependent on the adopted platforms and technologies that will be integrated into the developed software system. The end user software distributions may include multiple licenses under an end user agreement, or the different licensed software components may be released individually. The project will establish an open source repository, either independently or in conjunction with other open source initiatives, with where software that is developed by the project will be uploaded frequently. The exact model will be based upon the technology and standard choices that the consortium will make and an assessment will be made on the suitability of merging with particular existing open source initiatives. Anonymous read access will be allowed for external parties and contributions from these external parties will be assessed and merged, based on the discretion of the open source site administrators. Guidelines will be placed on the open source site to explain the external contribution process.

4.3 Deliverables

4.3.1 Deliverable Schedules
The project plan document contains a page of when each deliverable is due. This document can be accessed via gitlab at http://gitlab.openi-ict.eu/openi/tree/master/ProjectAdmin/ProjectManagement/ProjectPlan/OPENiProjectPlan.xlsx.

4.3.2 Deliverable storage and reviews
Based on the project plan, each deliverable is the result of the research from a task. It is the responsibility of the Task Leader to work with the Work Package leader to identify appropriate internal reviewers for each deliverable at least 1 month prior to the deliverable date and outline when they will be expected to review a deliverable. When the deliverable is ready for review, the task leader must email it to the reviewers and copy the appropriate WP list at least two weeks prior to the deliverable date. The reviewers must revert with comments /signoff at least one week prior to the deliverable date.

The project gitlab repository has a deliverables folder (http://gitlab.openi-ict.eu/openi/tree/master/ProjectAdmin/Deliverables) where final versions of all deliverables must be submitted. If the deliverable is marked as public this version must be communicated to the dissemination manager for online publishing.
4.4 Publications

The guidelines for publications and related confidentiality issues are provided by the Consortium Agreement section 4.4. Note that for pragmatic reasons in most cases it's sufficient to announce a publication when it is ready to be, or has been, submitted as the actual publication date in most cases would still be at least 15 days ahead; however this bears the risk of the submitter that the submission may have to be revoked in case an objection cannot be resolved. When preparing to submit a publication, partners need to send a mail to the WP7 email list with [notification of publication] in the subject line.

The body of the email must contain a link to the wiki where all details of the publication will be available under All Papers and Published Papers. In addition, all publication materials will be stored in the WP7 gitlab sub-repository.

4.5 Project factsheet

The project has produced a fact sheet which is stored on the Cordis website. (http://cordis.europa.eu/fp7/ict/ssai/projects-call5_en.html#OPENi) Please note, this document will be updated periodically to reflect changes in the project, and so is not reproduced here.

4.6 Website

The public website for OPENI is www.OPENI-ict.eu. This website is based on a wordpress installation and is hosted in the TSSG’s data centre. Please contact the Task Leader for Task 7.1 for updates to it. Deliverable D7.1 provides details about the projects online presence.

4.6.1 Updating News and Blog posts.

Currently the dissemination manager has exclusive publishing rights to the website. This is subject to change and this section will be updated as required.
5 Documentation and Reporting

5.1 Templates
Templates for deliverables and project presentations are available in GitLab.

5.2 Budget Reporting
Partners in OPENI are requested to submit bimonthly budget reports. This is implemented via an online form generated via Googledocs. Note, for security, that no financial details are communicated by this form, only person months and tasks performed. The coordinator will send a mail to all partners with a form for collecting budget data. This data will then be added to a master budget file on gitlab.
Each Workpackage leader will be requested to approve the budget for their WP. The file will be automatically updated when all budget reporting for a period is complete.

5.3 Project Reporting

5.3.1 Periodic reporting
Periodic reporting procedures will adhere to the EU guidelines provided in Cordi. These guidelines are also available on Cordis:
Template for periodic report:
Template for final report:

5.3.2 Project Audits
Audit procedures will adhere to the EU guidelines provided in Cordis: