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CATRENE Projects web tool

How-to document

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Version 1.2, March 2013

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1. Introduction

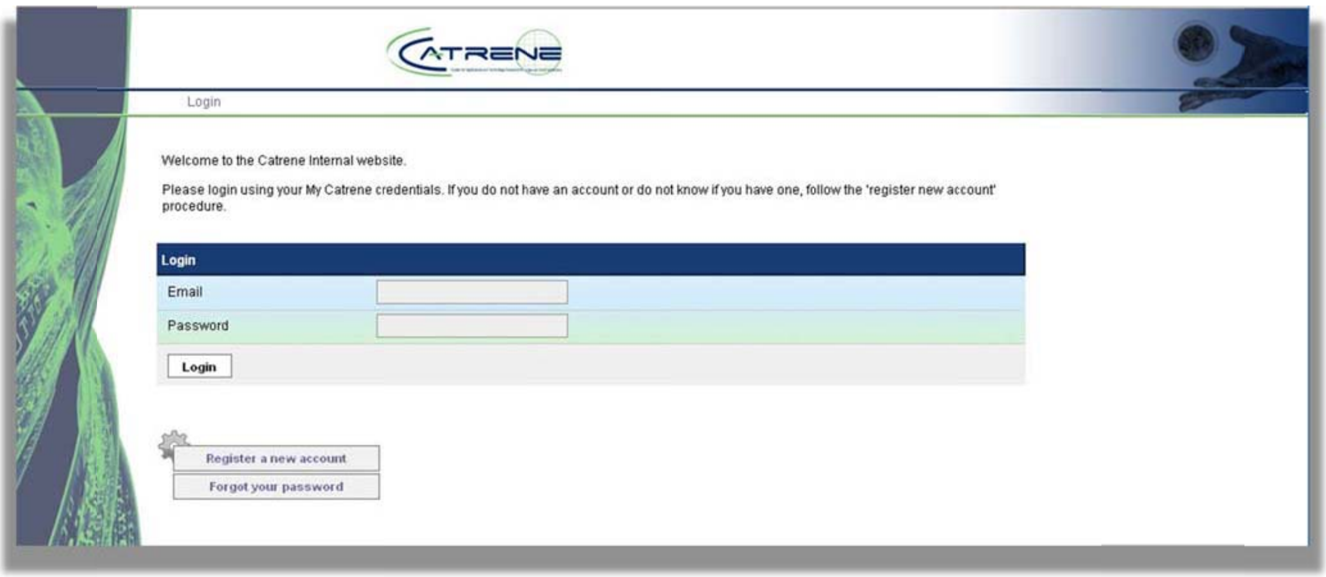
1.1. Functionality overview

The CATRENE Projects Web tool (https://projects.catrene.org) gives access to restricted information for the CATRENE projects.

Role-based access rights determine which information is visible on this web tool for each person. Depending on these rights the following can be accessed:

- Project management and project deliverabl s / documents – e.g Project Outline (PO), Full Project (FP), progress reports, change requests and workpackage deliverables;
- Project evaluation and reviews including all necessary documents – e.g. evaluation forms and review presentations;
- Meetings and meeting documents;
- General CATRENE information – e.g. general documents, guidelines & templates
- Contacts.

1.2. Accessing the CATRENE Project Web tool



You can access the Catrene projects web tool on https://projects.catrene.org. We use your email address as unique identifier.

1.2.1. Register a new account

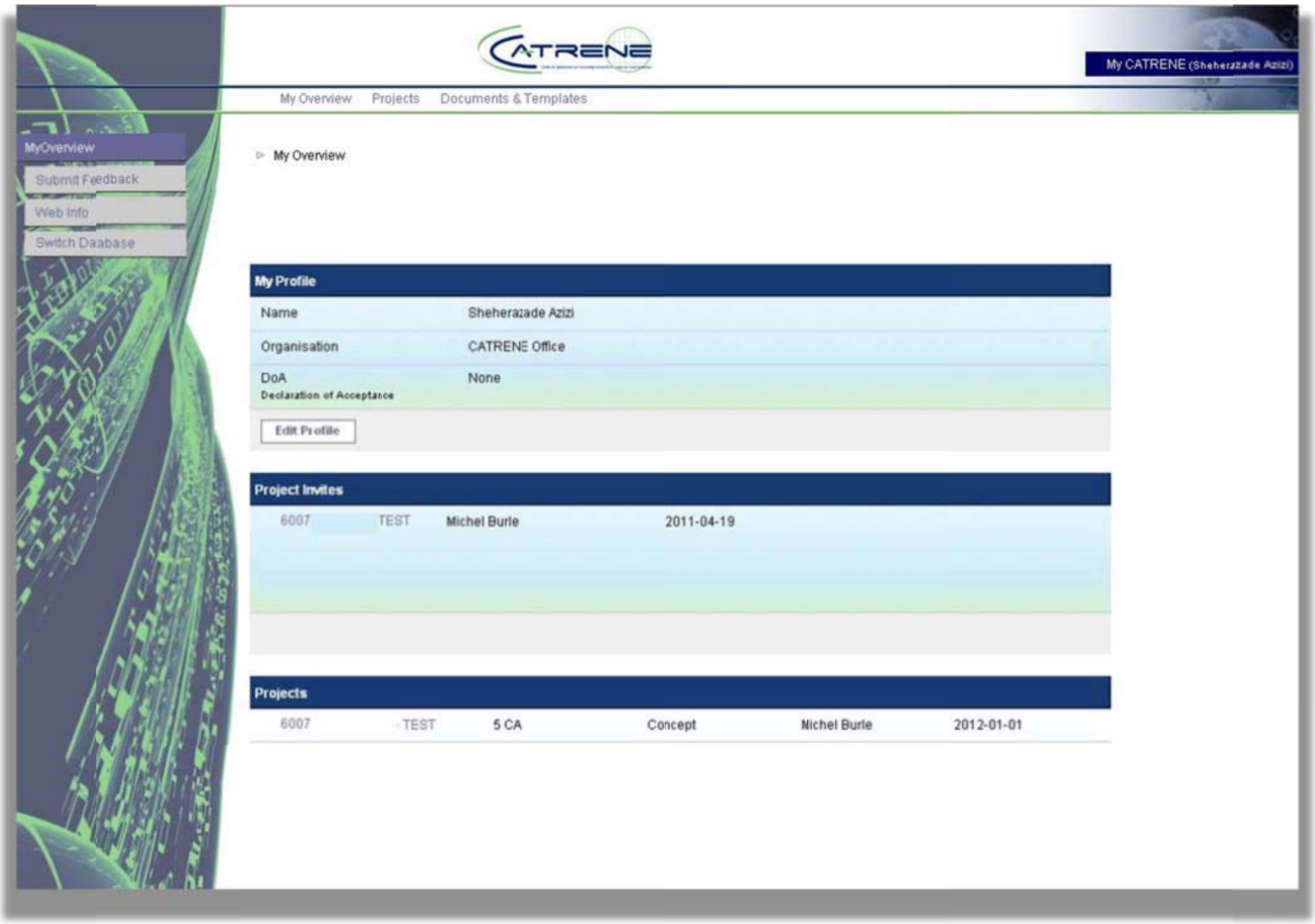
If you do not have an account or do not know if you have one, simply follow the ‘register new account’ procedure by clicking the ‘Register a new account’ button. You will need to fill in your email address and you will receive an automatic email which you need to confirm your registration.

1.2.2. Forgot your password

If you forgot your MyCATRENE account password, simply click the 'Forgot your password' button. You will need to fill in your email address and you will receive an automatic email which you need to reset your password.

1.3. Logged in - My overview

Once you have logged in, you will be presented with an overview including My Profile and Projects. *Please see the following chapters for a detailed description of these features.*



1.4. Submit feedback

If you have any feedback or questions about this Web tool, you can easily contact the CATRENE Webmaster by filling out the form (accessible via the le t hand menu – 'Submit Feedback'). The CATRENE Office will send you an answer to your question or comment as soon as possible.

1.5. Main menu items

Next to the homepage 'My overview', the Projects Web tool entails other features that are accessible via the blue top menu bar. The following chapters will go into detail for these menu items.

2. My Overview

2.1. My Profile

Within My Overview, the My Profile section summarizes your profile settings. You can edit your full profile by clicking the button ‘Edit my profile’. Next to editing your contact details, you can also upload a profile photo and reset your password.

If the email address in the profile is **not** your email address please do **not** modify the account to your own. You will then need to create a new account with your own email address instead.

2.2. Projects

Within My Overview, the Projects section lists the projects you are involved in / granted access to. Role-based access rights determine which projects you can see.

For more details on the Project features, please see chapter 3.

3. Projects

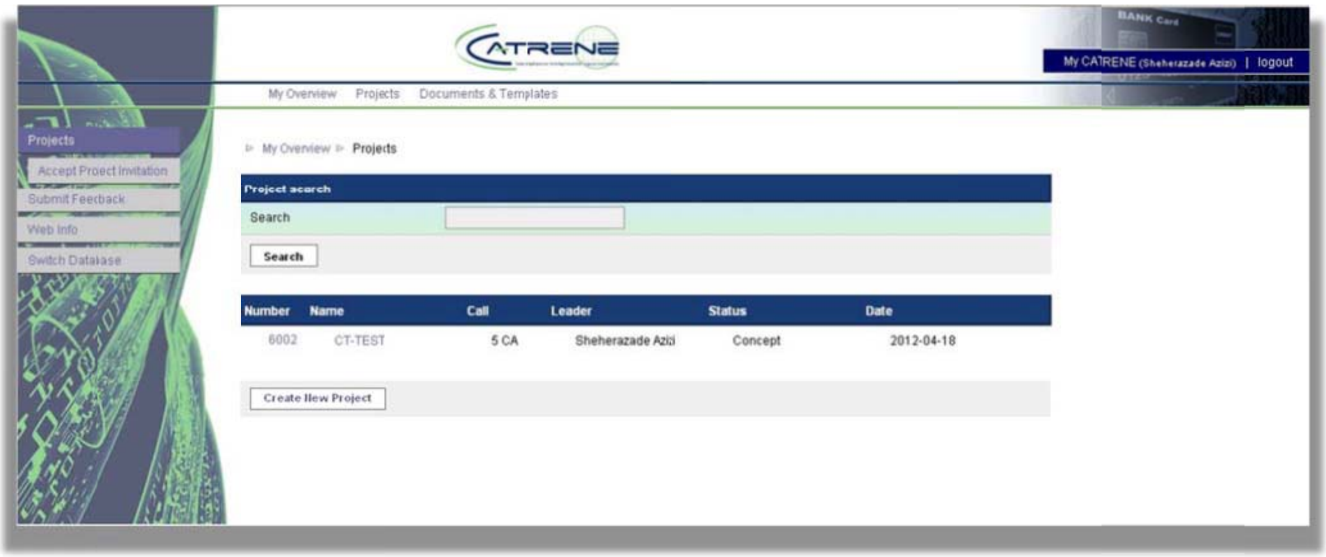
3.1. Projects overview

The ‘Projects’ section of the CATRENE Projects Web tool consists of all project-related information and provides several project management features such as creating a PO, FP and change request, uploading progress reports and managing project reviews.

To access the ‘Projects’ overview, select the top menu item ‘Projects’. You will then be redirected to a Project overview page. This page provides a personalised view of the projects based on your role in CATRENE.

By clicking on a project name you will be directed to a page dedicated to that project providing you with more specific project details. For further information, please see the following paragraphs.

You are also able to search in the projects list via the search at the top of the page. You can search on project name or project number.



3.1.1. Create a new PO

To create a new PO, click ‘Create New Project’. You will then be redirected to a new page (see paragraph 3.2.2.).

3.1.2. Accept a project invitation

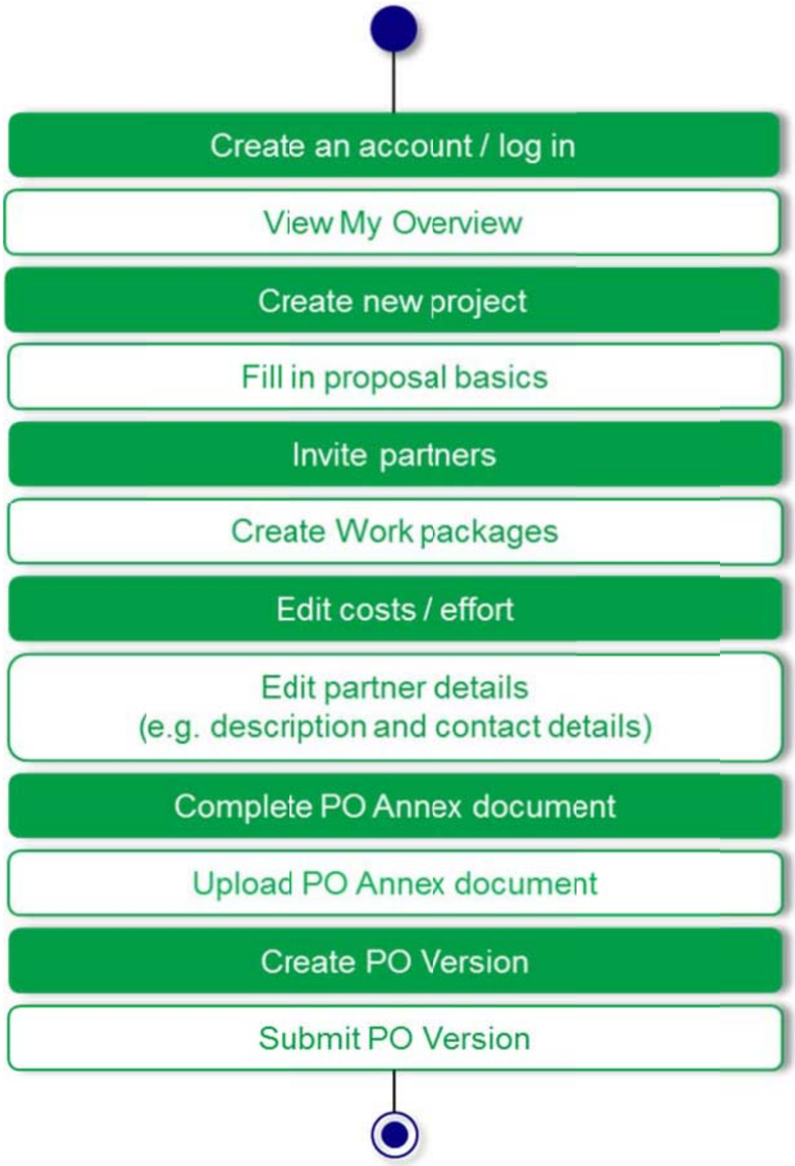
If you have received a project invitation by email, you can accept that invitation and join the consortium by clicking the ‘Accept Project Invitation’ link in the left hand menu. You will be asked to enter the invitation code from the invitation email you have received.

Note that the project invitation applies to inviting a partner organisation. An invitation should be send to / accepted by only 1 person – the main contact for that partner organisation.

3.2. Creating a project - introduction

The process of creating a new project starts with creating a PO. The following steps like creating an FP and creating a change request are all linked together and quite similar to the PO creation process and related pages. Therefore, this chapter will first go into detail about creating a PO and will then describe the exceptions in that same process for creating an FP and/or change request.

The state diagram below shows the different steps to successfully submit your PO. The following paragraphs describe the different steps in detail.



3.2.1. Role-based access and features

As a Project Leader you can:

- Modify your personal / company details
- Create, view and modify a proposal in the Projects Web tool, including:
  - proposal basics
  - workpackages
  - effort
- Set up (and modify) your consortium by inviting/removing partner organisations

- Upload the PO Annex document (in Word) to the Community Web tool.
- Submit the final PO including the PO Annex

As a workpackage Leader you can:

- Modify personal / company details
- Accept an invitation for a Project Proposal (sent by a Project Leader)
- View the proposal information
- ***Fill in, view and modify the effort for your workpackage***

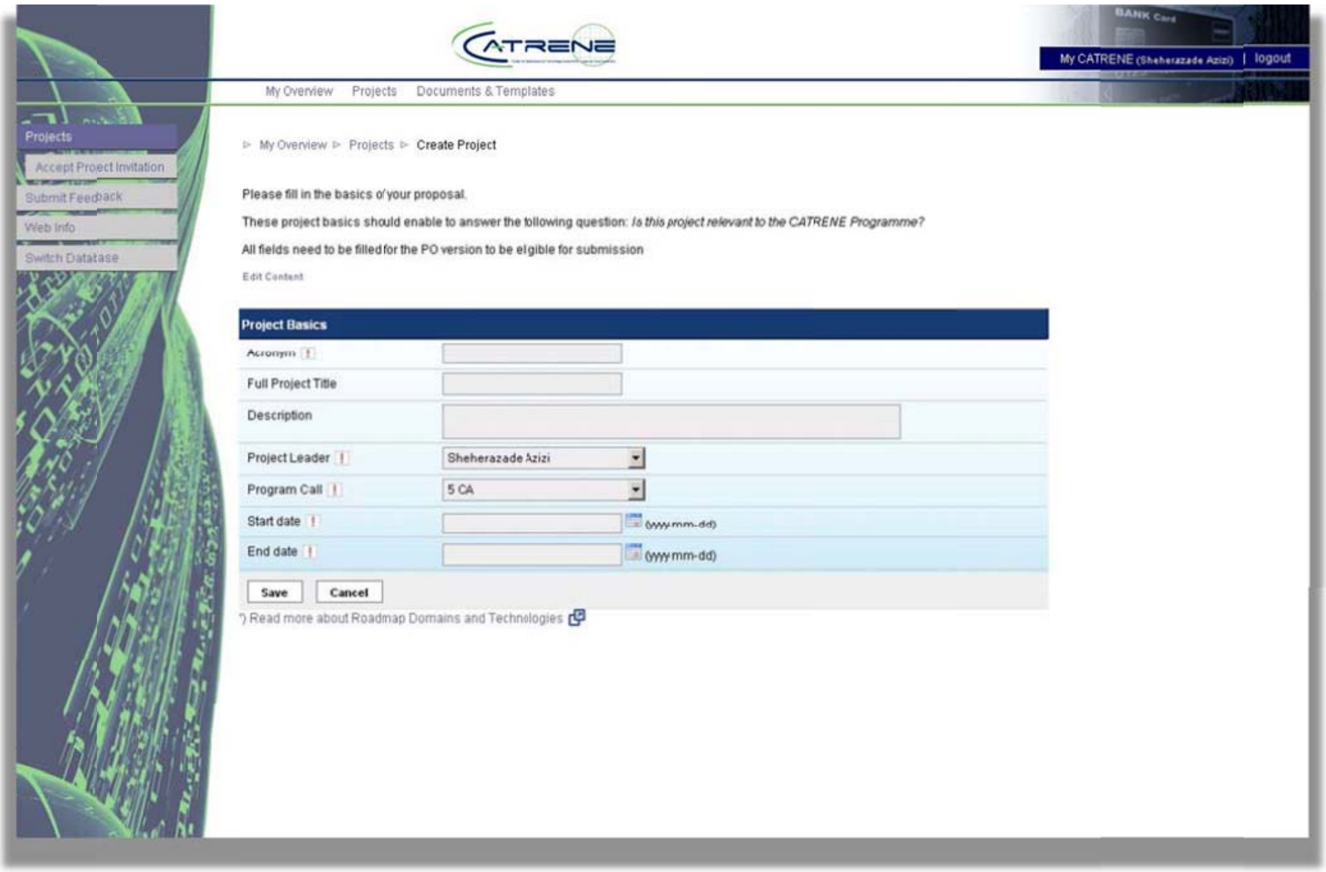
As a technical contact you can:

- Modify personal / company details
- Accept an invitation for a Project Proposal (sent by a Project Leader)
- View the proposal information
- ***Fill in, view and modify the effort for your organisation***

3.2.2. Create a new PO - filling in the PO basics

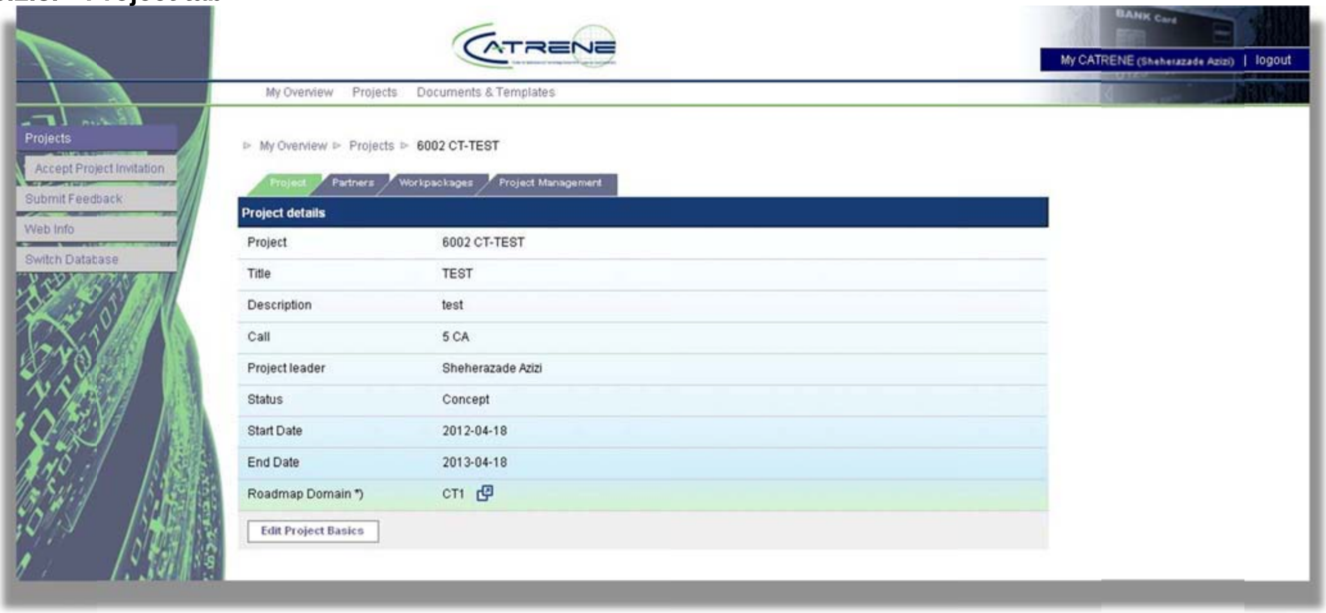
When you have clicked the button 'Create New Project' (in the Project overview page, see paragraph 3.1) you will be redirected to a page where you will be asked to fill n some basic information about your proposal. Once you have filled in these fields you can create your new PO by clicking 'Save'.

Note: all fields need to be filled for the version to be eligible for submission.



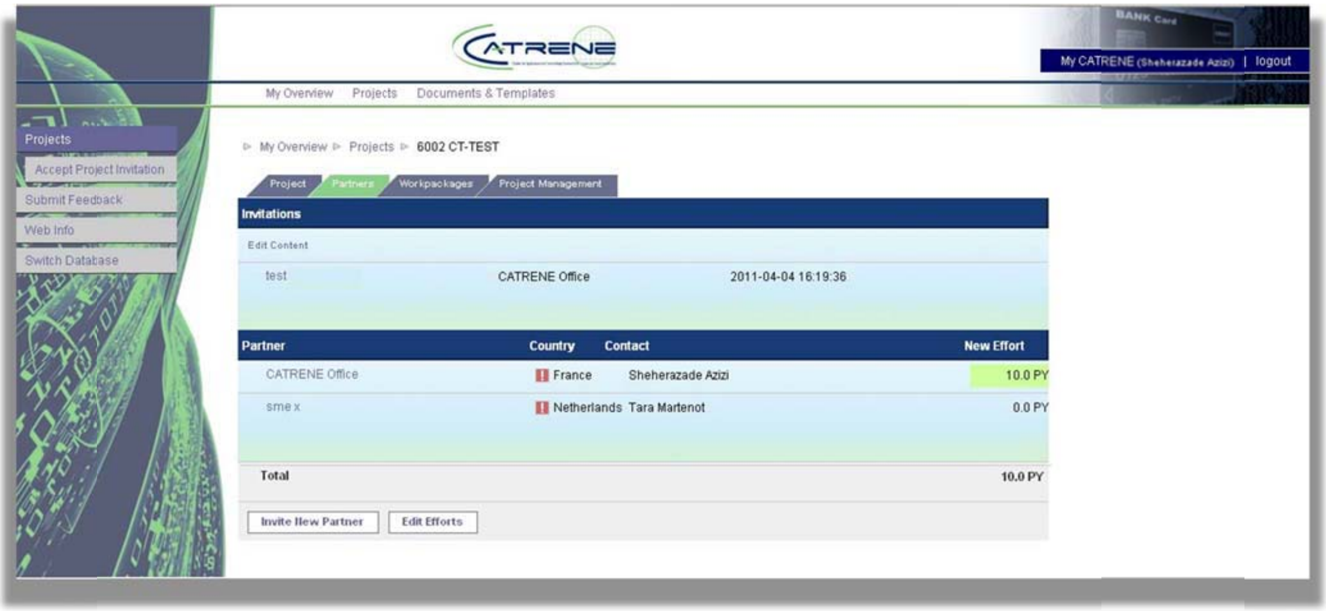
After this save you will be presented with the saved PO basics and multiple tabs, which you can access to fill in the details of your proposal (see next pages).

3.2.3. Project tab



The first tab of your Project page is the 'Project tab'. Under this tab you will find some basic details about the project. You can update / complement the information by clicking the 'Edit Project Basics'.

3.2.4. Partners tab



Clicking on the ‘Partners tab’ will direct you to a page dedicated to the different consortium partners and their respective efforts.

From this page you can:

- Invite a new partner organisation
  - invited partners will show in the top invited partner overview
  - partners that have accepted will be added to the bottom partner overview
- Edit efforts (per partner per workpackage / year)
- Select a partner and view/edit its details (description, view and add contacts, efforts) – see next paragraph

Note 1: *<u>Inviting a partner applies to inviting a partner organisation</u>. An invitation should be sent to / accepted by only 1 person: the main contact for that partner organisation. If the invitation was incorrectly addressed, the invitation code can be used by another contact person within the partner organisation to be accepted.*
If you would like to add extra contact persons per organisation, please refer to paragraph 3.2.4.2.

Note 2: *It is advised to first make sure to list all partners and workpackages correctly before editing efforts. <u>Only partners that have accepted are editable for effort and workpackages.</u>*

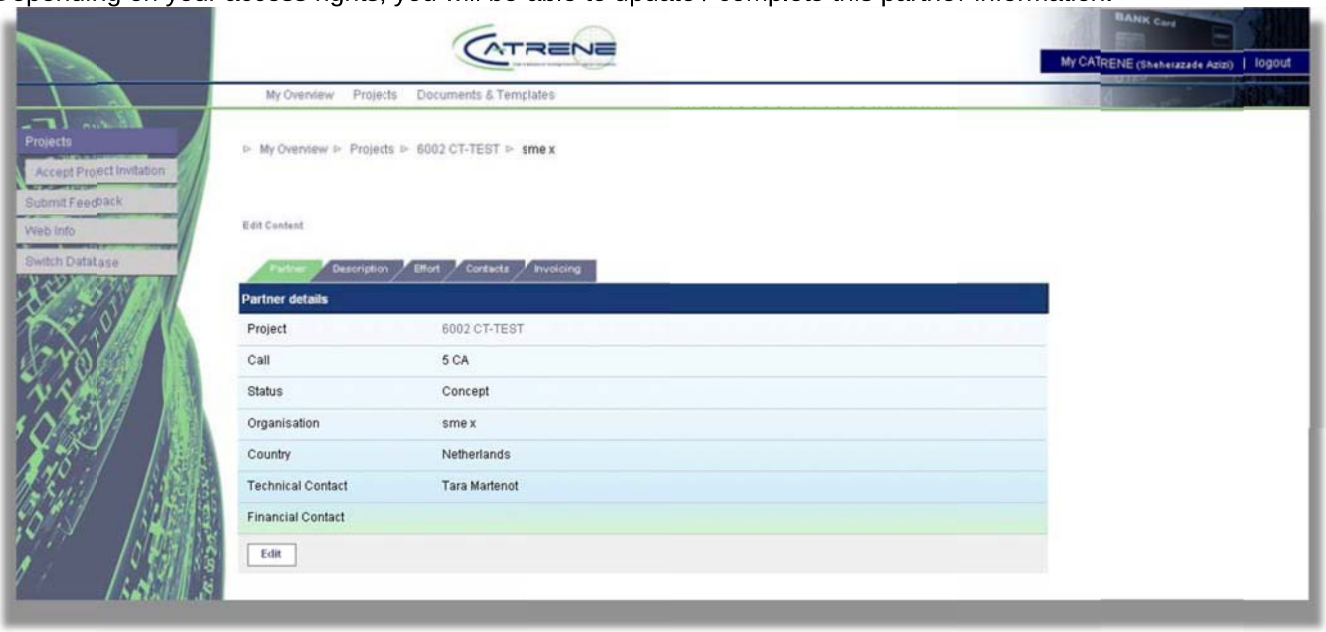
Note 3: *Please make sure to add a description per partner organisation that adheres to the criteria as stated in the PO guidelines.*

3.2.4.1. Partner contact details

When clicking on a partner's name, you will be redirected to a page dedicated to the partner including tabs for:

- Partner details (incl. technical and financial contact person)
- Description
- Effort
- Contacts (see next paragraph)

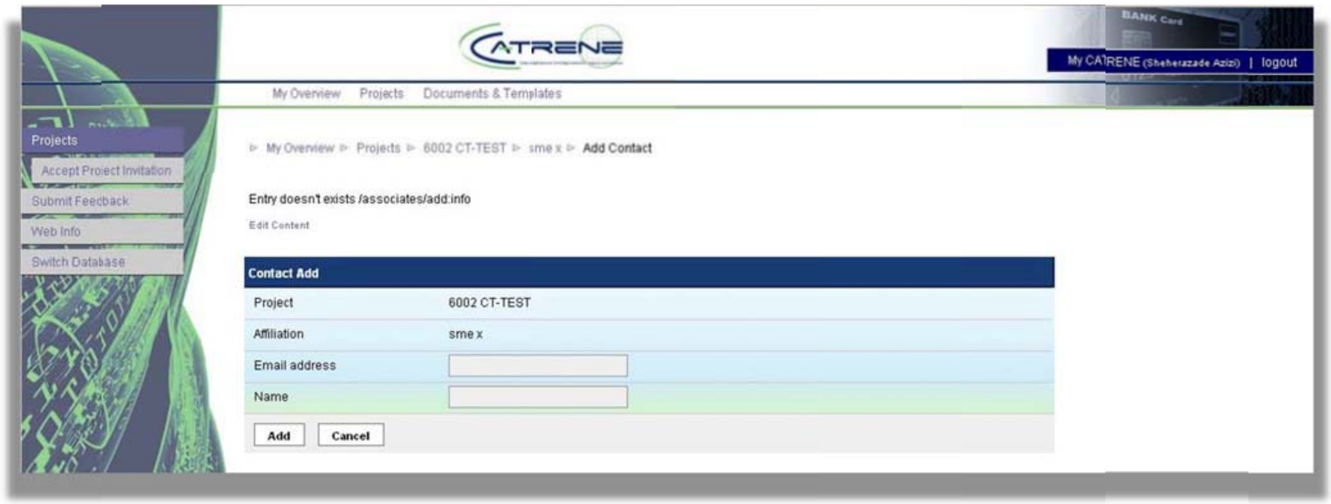
Depending on your access rights, you will be able to update / complete this partner information.



3.2.4.2. Adding a contact to a partner organisation

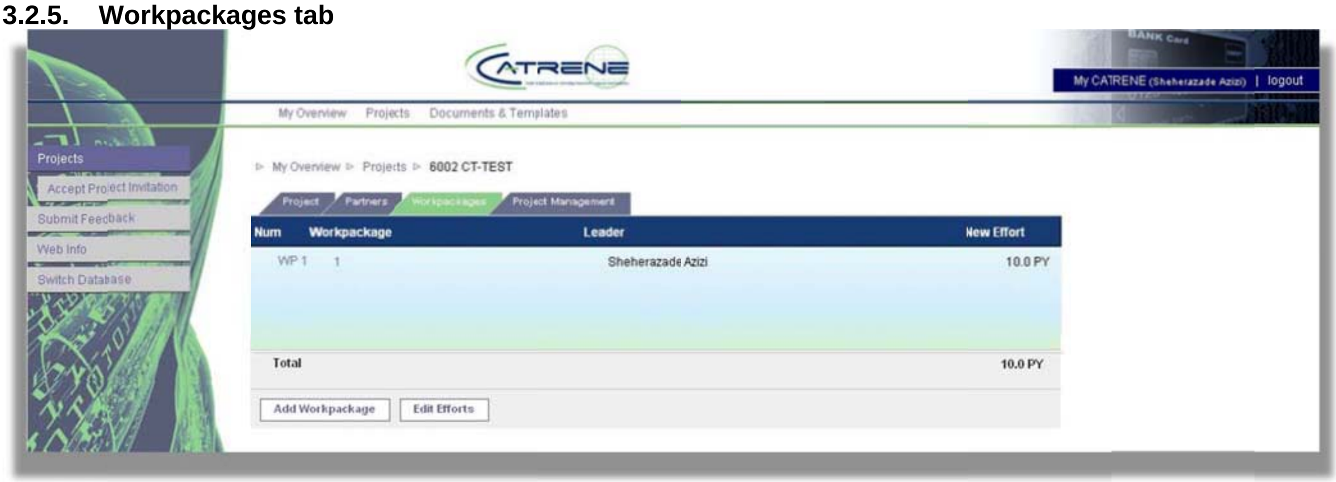
A specific feature of this section is that you can add multiple contacts to a partner organis tion.

To add a new or existing contact, first click the Partner name, then click the ‘Contacts’ tab and fill in the requested fields. The existing c ntact list is based on the known contacts for that partner (with an account) in the CATRENE Projects database.



Contacts added via this way are eligible to be selected as technical or financial contact in the tab on ‘Partner details’ (first tab).

3.2.5. Workpackages tab



Clicking on the ‘Workpackages tab’ will direct you to a page dedicated to the proposal workpackages. From this page, you can:

- Add and name a workpackage
- Edit the efforts per workpackage (see next page) – this is the same overview as accessible via the ‘Partners’ tab.
- Select a workpackage and view/edit its details (basics, description, effort per workpackage) and change the order of workpackages.

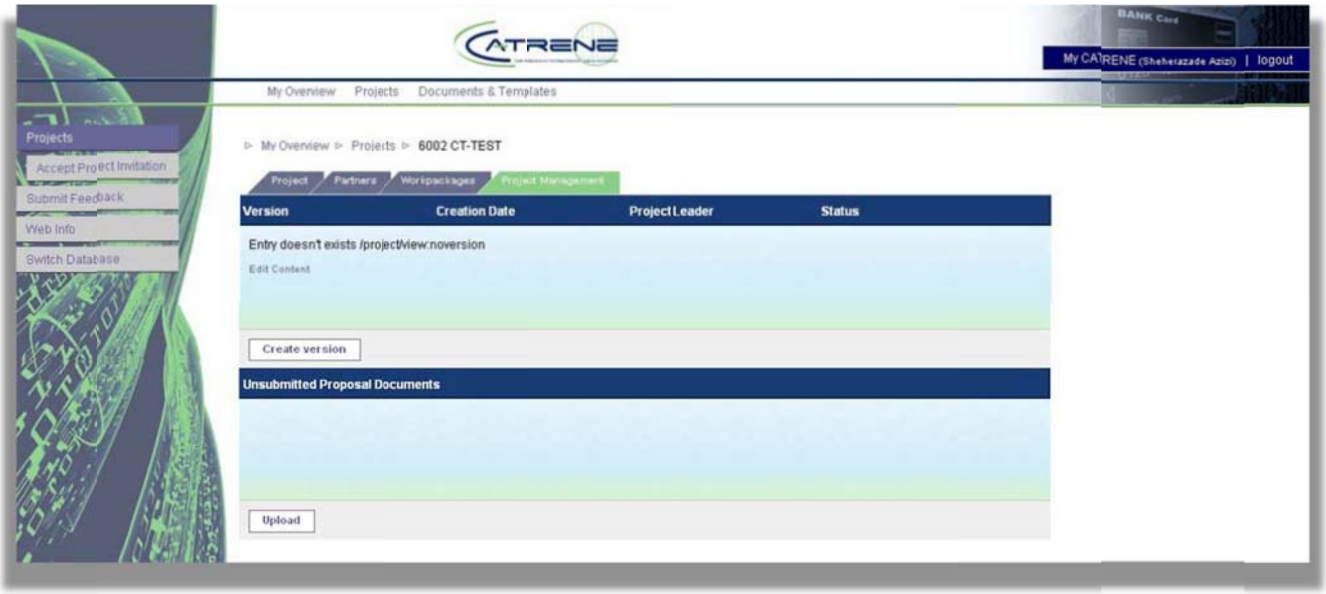
3.2.5.1. Editing efforts

You need to fill in the effort for each workpackage per partner per year (in Person Years – with 2 decimals).

As long as you are editing efforts you can go from one tab (WP 1, etc.) to another. However please note that if you would like to navigate away from this page, make sure to click the button 'Update' to save your data.

The overview will generate totals automatically.

3.2.6. Project management tab



Clicking on the 'Project Management' tab will direct you to a page dedicated to the different versions of your project. Each project has the following versions:

- PO
- FP
- Change request(s) – *if applicable*

Working with a 'working set' and 'version'

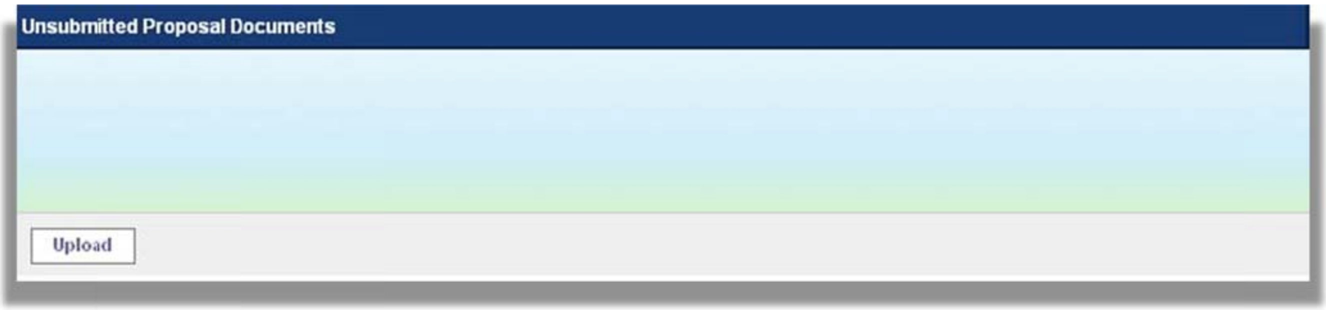
The system starts with a blank *working set* that enables you to work on your proposal. The working set is automatically saved and you can return to the same data by just logging in again.

A working set that is eligible for submission (passing all the system / guideline checks) can be stored as a *version* (see paragraph 3.2.8). This version can then be submitted as your official PO/FP/change request.

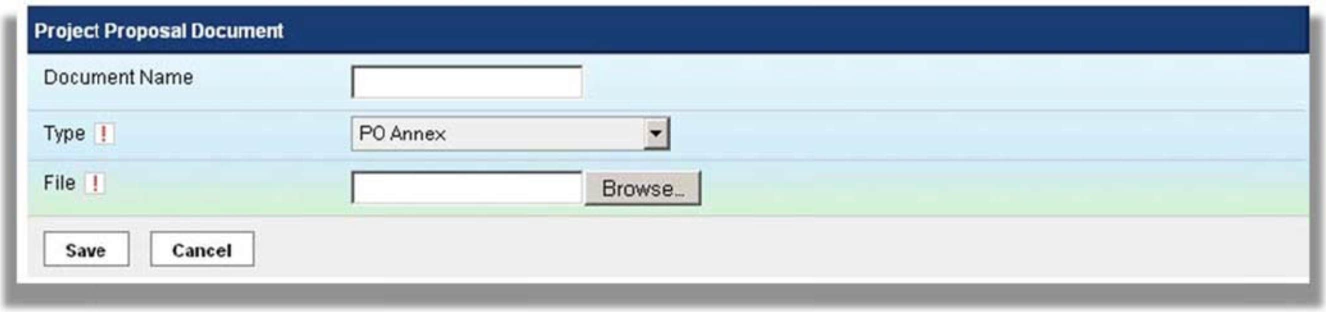
3.2.7. Upload the PO or FP Annex documents

The PO or FP Annex documents should provide the textual description of the content of your project proposal. The template is available on the CATRENE Projects Web tool (http://www.projects.catrene.org/call_documents) and in the 'Documents & Templates' section of the CATRENE Web tool.

To upload the PO or FP Annex, navigate to 'Project Management' and upload the document by clicking the button 'Upload' in the section 'Unsubmitted Proposal Documents'.



This will prompt a page with an upload feature.



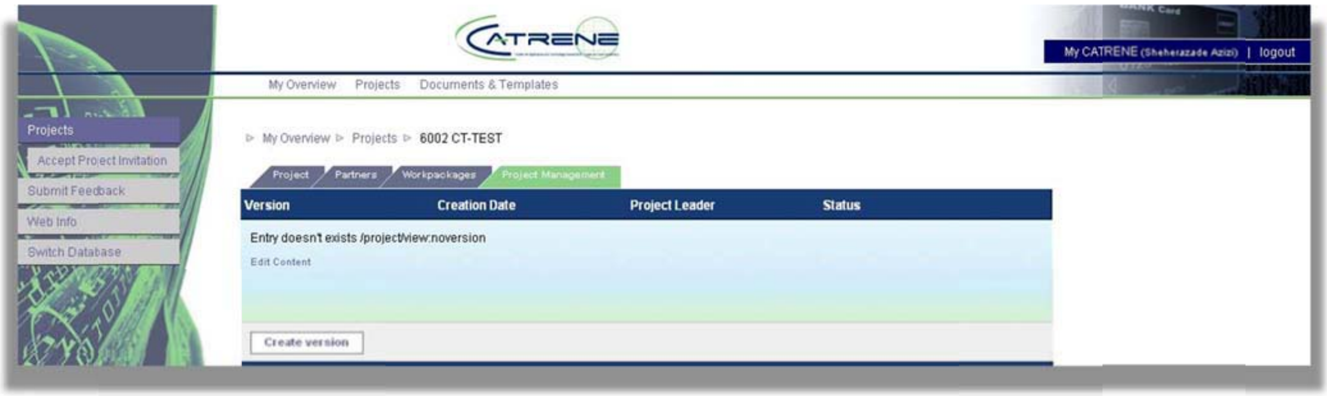
When working on the proposal, you can upload different versions of the Annex document. Then, in the create version process (see next paragraph), the system will ask you to choose 1 Annex document to attach to the version.

For the PO or FP Annex, use exclusively MS Word (*preferably in Office Open XML, .docx format - MS Office 2007 or later*[1]). When using images in the document, preferably use .bmp or .jpeg.

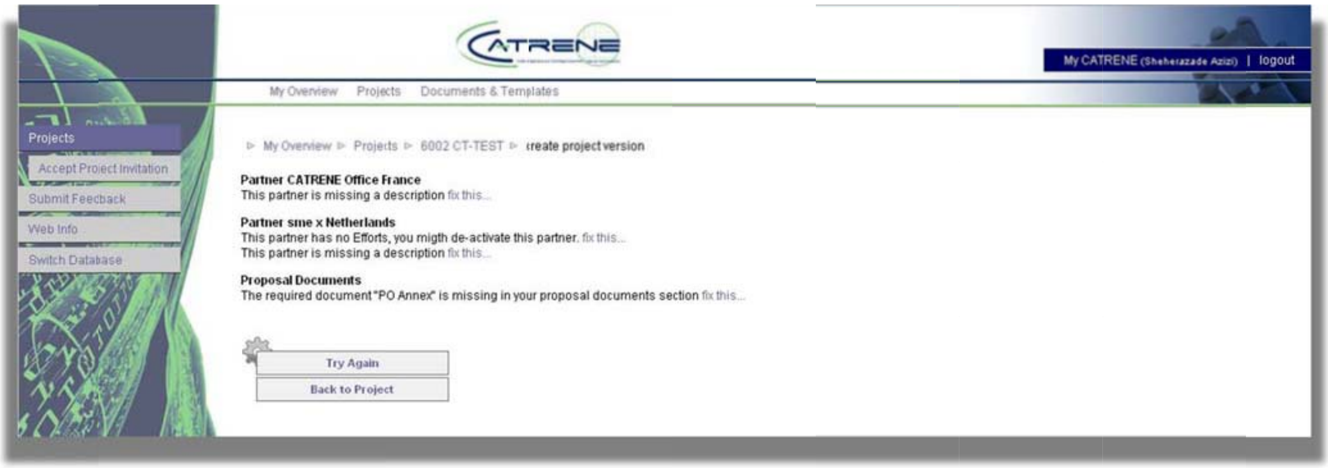
[1] If you are unable to open / create .docx documents, we advise you to download the free converter. http://www.microsoft.com/downloads/en/details.aspx?familyid=941b3470-3ae9-4aee-8f43-c6bb74cd1466&displaylang=en

3.2.8. Create version

Once you are ready with a working set and the PO Annex document, and would like to store them as a 'version', navigate to 'Project management' and select 'Create version'.



The system will check your proposal whether everything has been filled in / uploaded (correctly) and prompt warnings if necessary. E.g.:



Furthermore, if you uploaded multiple PO Annex documents to the section 'Unsubmitted proposal documents', the system will ask you to choose the correct PO Annex to attach to the version.

If the proposal passed all the system checks, the PO version is stored as a not submitted version in the ‘Project Management’ tab:

Modifying your proposal

Before submitting a version, you can continue to modify the proposal and *save revised versions* (overwriting the stored version) right up until the deadline.

You can also revert back to a working set from a stored version of your project.To do this, simply navigate to the ‘Project Management’ tab, choose your (PO/FP) version and select ‘Create as working set’.

Deleting a version

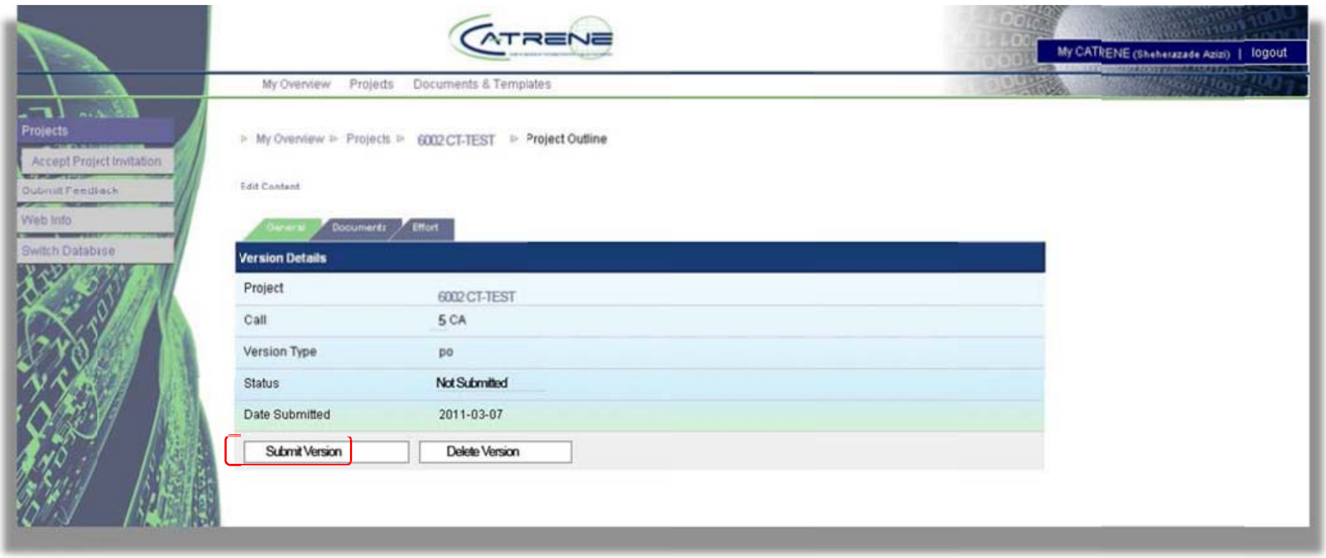
To delete a version before the deadline if it has not yet been submitted, you must select the relevant PO version in the ‘Project Management tab’ and then press the button ‘Delete Version’.

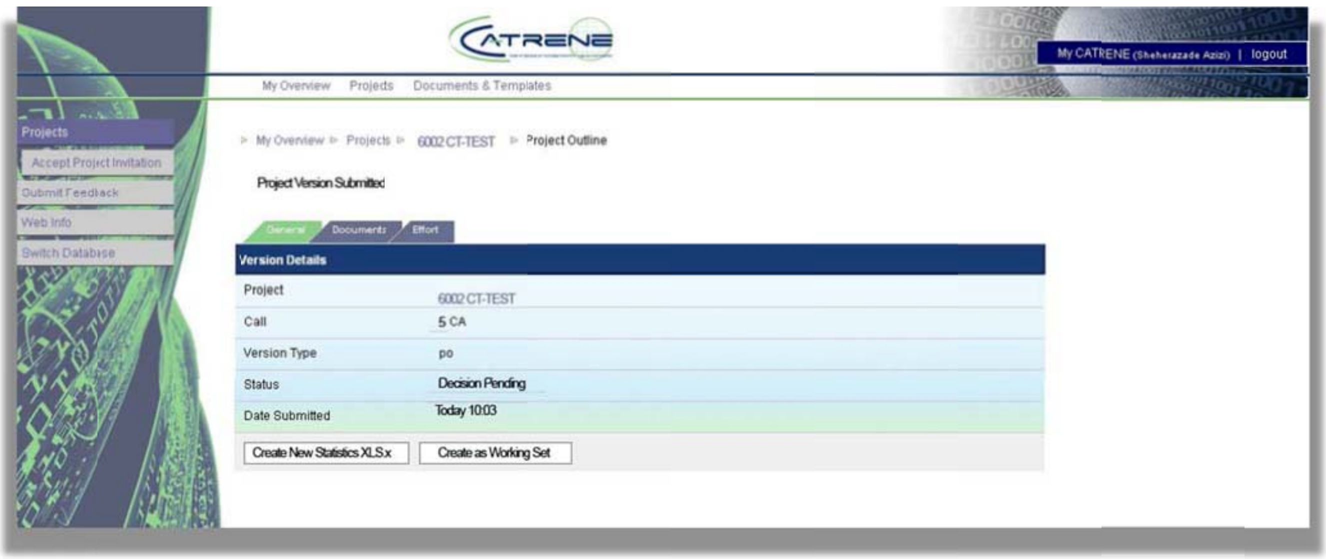
Downloading a merged document

After completing the creation of a version you will be able to download a document merging the PO Annex document and the online data. To access this functionality click the version name.

3.2.9. Submit a version

To submit your proposal you must select the relevant version in the ‘Project Management tab’ and then press the button ‘Submit Version’.





Submitting a version is the ***last and definite step*** of the PO creation process. Once the PO is submitted you will not be able to submit again. If you want to delete or cancel a submitted proposal please contact the CATRENE Office.

Note: if at the deadline no version has been submitted, the system will automatically submit the latest eligible version that was saved.

3.3. Creating an FP

Creating a FP is similar to creating a PO as all project information and Projects Web tool tabs are the same.

In order to create the FP:
- edit/complement all online project information where necessary
- Update & upload the FP Annex document.
- Create an FP version via the ‘Project Management’ tab
- Submit the FP version

If you would like to start working on a FP by reverting back to all submitted PO data and efforts make sure to load the PO working set. To do this, simply navigate to ‘Project management’, select your version and select ‘Create as working set’.

The terms for modifying / deleting an FP version are the same as for the PO version, only take into account the FP deadlines.

3.4. Creating a change request

Creating a change request is similar to creating a PO or FP as all project iinformation and CATRENE Projects Web tool tabs are the same.

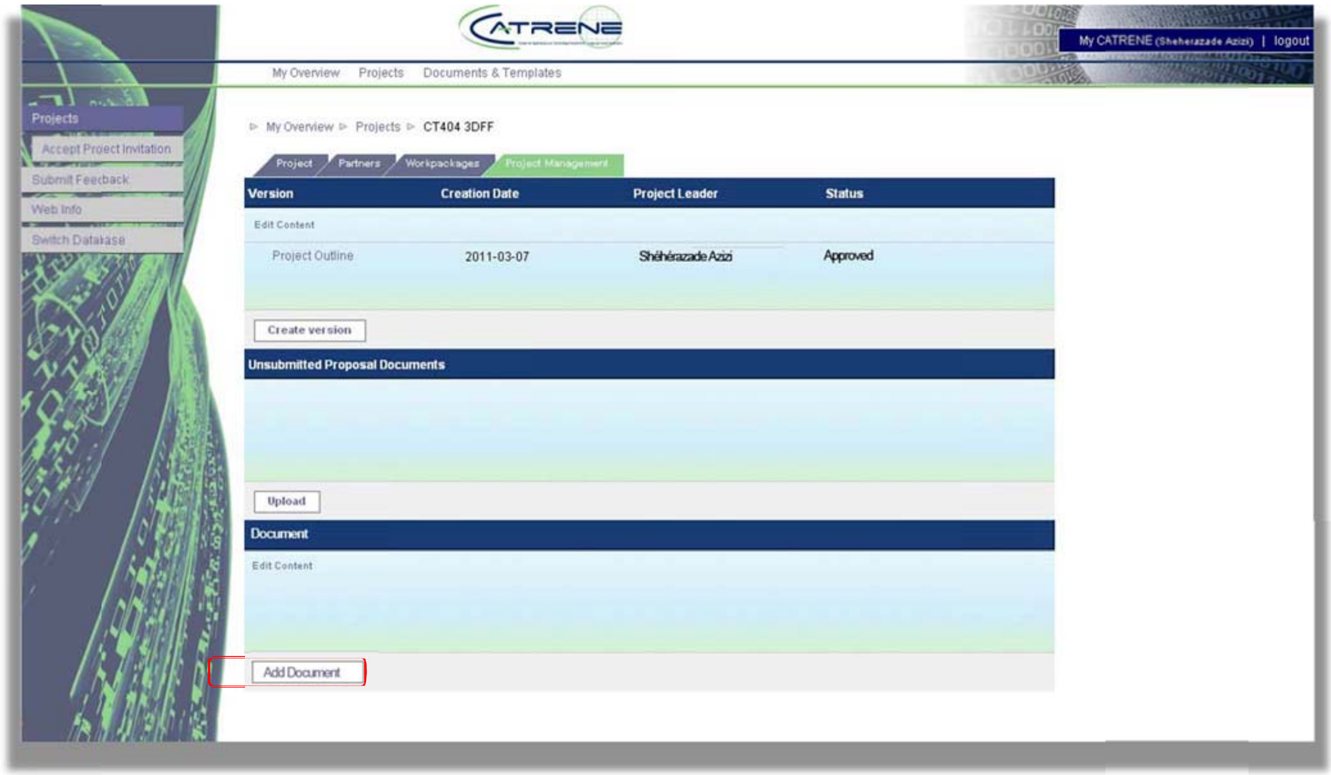
In order to create the change request:
- edit/complement all online project information where necessary
- Update the Joint FP Annex document
- Fill in the change request template document (available under ‘Documents & Templates’)
- Upload the Annex documents (with and without Track Changes)*
- Upload the change request template document*
- Create an change request version via the ‘Project Management’ tab
- Submit the change request version

If you would like to start working on a change request by reverting back to all submitted FP or older change request data, costs and efforts make sure to load the relevant working set. To do this, simply navigate to ‘Project Management’ tab, select your version and select ‘Create as working set’.

* **Note: all** relevant documents for the change request can be uploaded in the section ‘Unsubmitted Proposal Documents’. The CATRENE Office will then attach these documents to the change request accordingly.

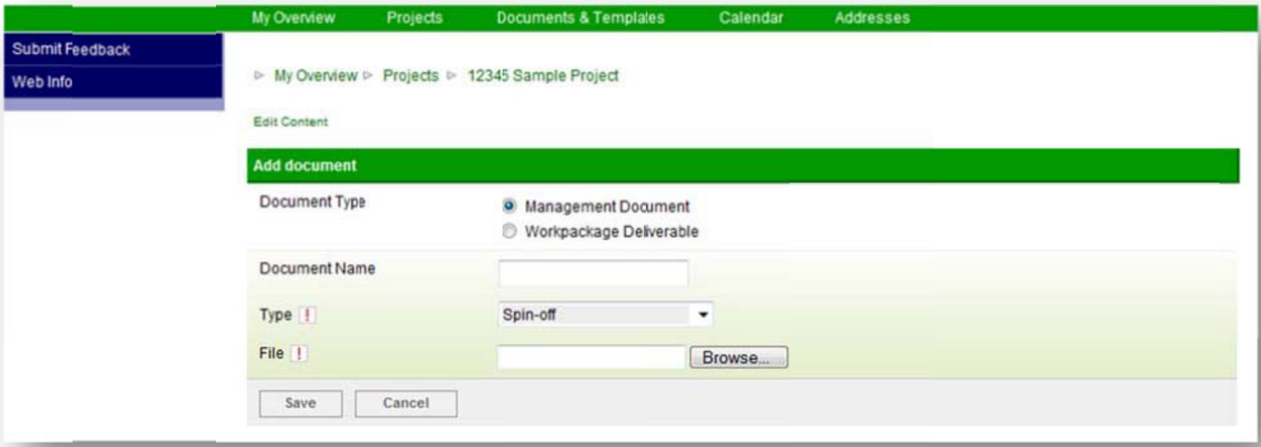
3.5. Uploading Project documents

Once a project is labelled and r nning you can use the ‘Project management’ tab to upload relevant documents like project progress reports, publications, dissemination overviews, etc.



To do this, click the ‘Add document’.

This will redirect you to a page where you can upload different types of documents.



Note: make sure to correctly choose the document type when adding a document as this type is crucial for the document representation in the CATRENE Projects Web tool.

4. Glossary

CR	Change Request
FP	Full Proposal
PL	Project Leader
PO	Project Outline