Project quality plan

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Summary

The present document is the Project Quality Plan (PQP) for the project METIS of the EURATOM Programme. It describes requirements and procedural regulations intended to establish a uniform approach to the completion of the project. It is to be used as a guide for participants in METIS, concerning information management, document publication, quality assurance, project organisation and contact information.

Approval

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Abbreviations and Acronyms

Acronym	Description
DoA	Description of Action
EC DG RTD	European Commission – Directorate General for Research and Technological Development
FLEXX	Electronic Collaborative Content Platform
GB	Governing Board
PMO	Project Management Office
PQP	Project Quality Plan
PR	Periodic Report
QA	Quality Assurance
WP	Work Package
WPL	Work Package Leader
SAC	Scientific Advisory Committee
SG	Stakeholder Group

1. Summary

The present document is the Project Quality Plan (PQP) for the project METIS of the EURATOM Programme. It describes requirements and procedural regulations intended to establish a uniform approach to the completion of the project. It is to be used as a guide for participants in METIS, concerning information management, document publication, quality assurance, project organisation and contact information.

2. Introduction

2.1. Purpose

The Project Quality Plan of METIS will describe how quality will be managed throughout the project.

2.2. Application and validity

The requirements contained in the present document apply to all personnel engaged in METIS. Revisions are valid from the date of issue.

3. Decision-making process: Project bodies and actors

There are several governing bodies in the project, comprised of different actors, as summarized below:
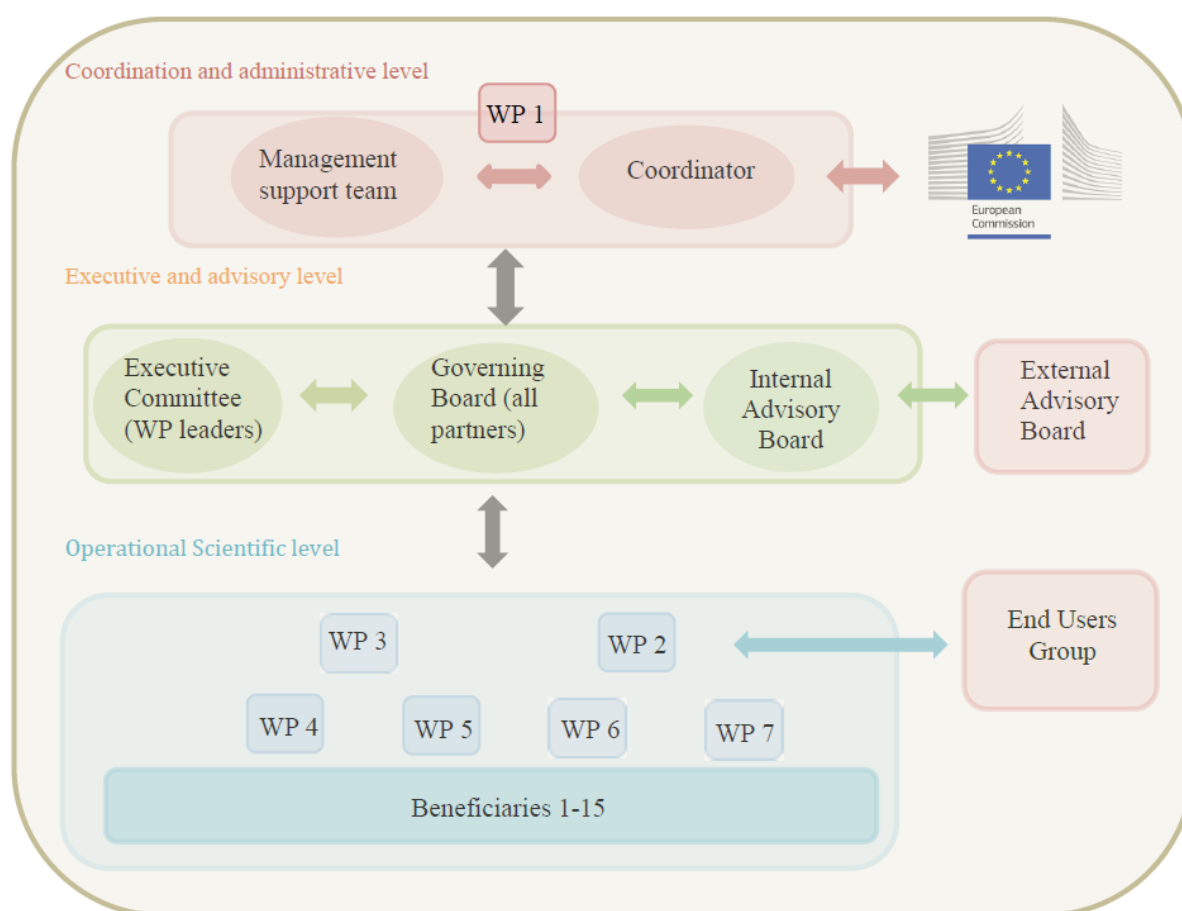
Figure 1: The decision-making process

This governance structure guarantees that each member is represented throughout project implementation and also facilitates project progress. The roles and responsibilities of the different project management bodies and actors are detailed in the Grant agreement and its annexes.

For METIS, the project bodies are the following:

- Coordinator
- Governing Board
- Executive Committee
- WP leaders
- External Advisory Board
- Internal Advisory Board

- End Users Group

Further details on decision-making processes and procedural regulations are provided in the consortium agreement to be signed by all beneficiaries of METIS.

In addition, every partner shall appoint a Primary Contact whose role is to ensure that all relevant information about the project is available to all contributors in the given organization and he/she shall make sure that the contact list of his organisation is up to date. The Primary Contact will be solicited for all inquiries where no other contact is provided for the task in question.

4. Collaborative web platform of the project (FLEXX)

The METIS collaborative platform will be used for internal exchanges and publication of reports and deliverables – these documents shall be uploaded and updated at: https://app.flexx.camp/metis-workflow.

The platform is maintained by LGI (PMO). LGI is responsible for account creation and the management of user permissions. All related requests shall be addressed to LGI at: gilles.queneherve@lgi-consulting.com.

Figure 2: FLEXX log in page

The folder tree of the project is shown below (updates to this initial folder structure will be made in the course of project implementation as necessary).
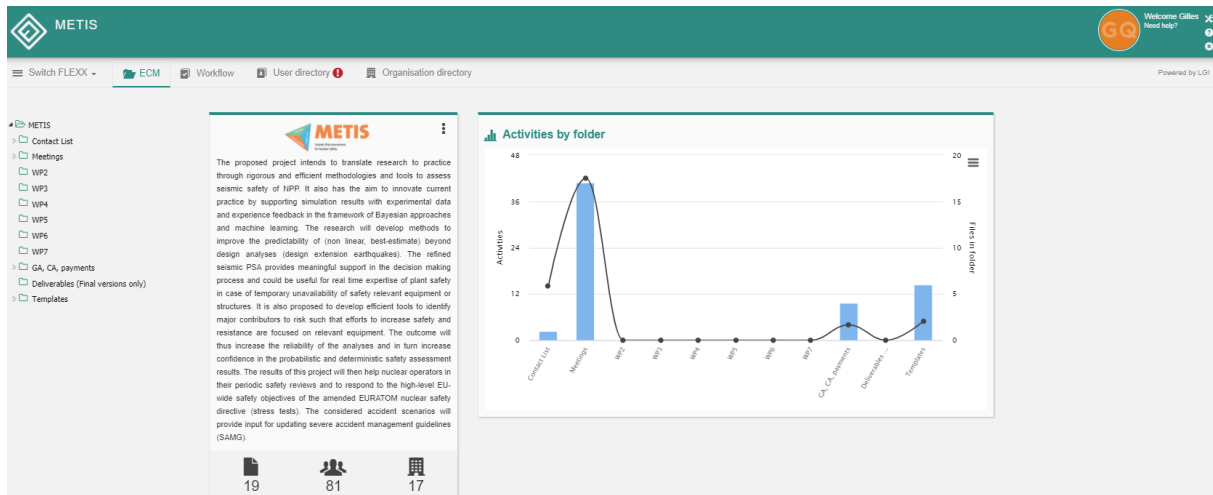
Figure 3: ECM structure of FLEXX

4.1. Mailing List

The "User Directory" on the FLEXX makes it easier to:

- Find information about the project consortium ("who is who")

- Write emails to members or groups of members (e.g. financial admins, WP3 contributors, etc.)

Using the mailing lists on the FLEXX replaces contact lists in Excel which may exist in multiple versions on multiple computers locally. Since every partner is invited on the FLEXX, they all have a User Directory profile created, allowing them to send emails directly from the platform. Each project body shall have its own diffusion list, and any number of lists can be created on demand.

5. Meetings

Several types of meetings may be organised during the project (periodic or ad hoc technical progress meetings, etc.) by either the coordinator or by the WP leaders. After a consultation between the participants involved, an item containing at least: meeting date, meeting location and preliminary agenda should be made available as soon as possible in the FLEXX. For each meeting, the organiser must write the minutes, make them available on the collaborative project platform and notify the necessary consortium members electronically.

6. Information management

Information used or generated by the project may take many forms. This chapter will describe the internal procedures for document preparation in a quality-oriented approach. Documents produced in the project fall into several categories:

- **Contractual technical documents** including technical deliverables and milestones. These are either public or restricted to project participants and the EC
- **Other technical documents** including non-contractual reports, support documents and progress meeting minutes restricted to project participant and the EC
- **Contractual reporting documents** including administrative & financial documents restricted to project participants and the EC

6.1. General information

The main principle regarding document preparation and internal dissemination is that each beneficiary applies their own Quality Assurance (QA) procedures for the preparation of their contributions to project documents. If such procedures are not normally applied by the beneficiary, the project templates should be used and further guidelines can be provided by the project management office upon request.

Templates to be used for project documents are available in the FLEXX at:
https://app.flexx.camp/mso/ecm/metis-ecm-folder-9885

All METIS documents should be named as follows:

METIS – Tn.ii– vj Short Title

Where:

- **T** is the document type: "D" for deliverables, "MS" for milestones, "Min" for minutes, "R" for reports and "O" for other documents
- **n** is the work package number
- **ii** is an incremental number for this WP and this type of document, which is delivered by the WPL (2 digits, except for deliverables, for which there is only 1 digit, as defined in Part B of Annex 1 to the GA)
- **j** is an incremental number for the version of the document (starting at 1.0).

To ensure that documents are of the highest quality, the validation process is to be implemented using FLEXX, as described in Section 6.2.

6.2. Preparation of contractual technical document (deliverables, milestones)

6.2.1. Formal process of validation of deliverables

The workflow tool on FLEXX, developed by LGI, enables:

- The internal review of contractual technical documents (e.g. deliverables) as soon as they are available on the platform
- Monitoring project progress in terms of milestones and deliverables
- A more streamlined process for the publication and approval of deliverables while enforcing **appropriate quality assurance processes**

The various steps necessary to issue contractual technical documents are presented in the image below:
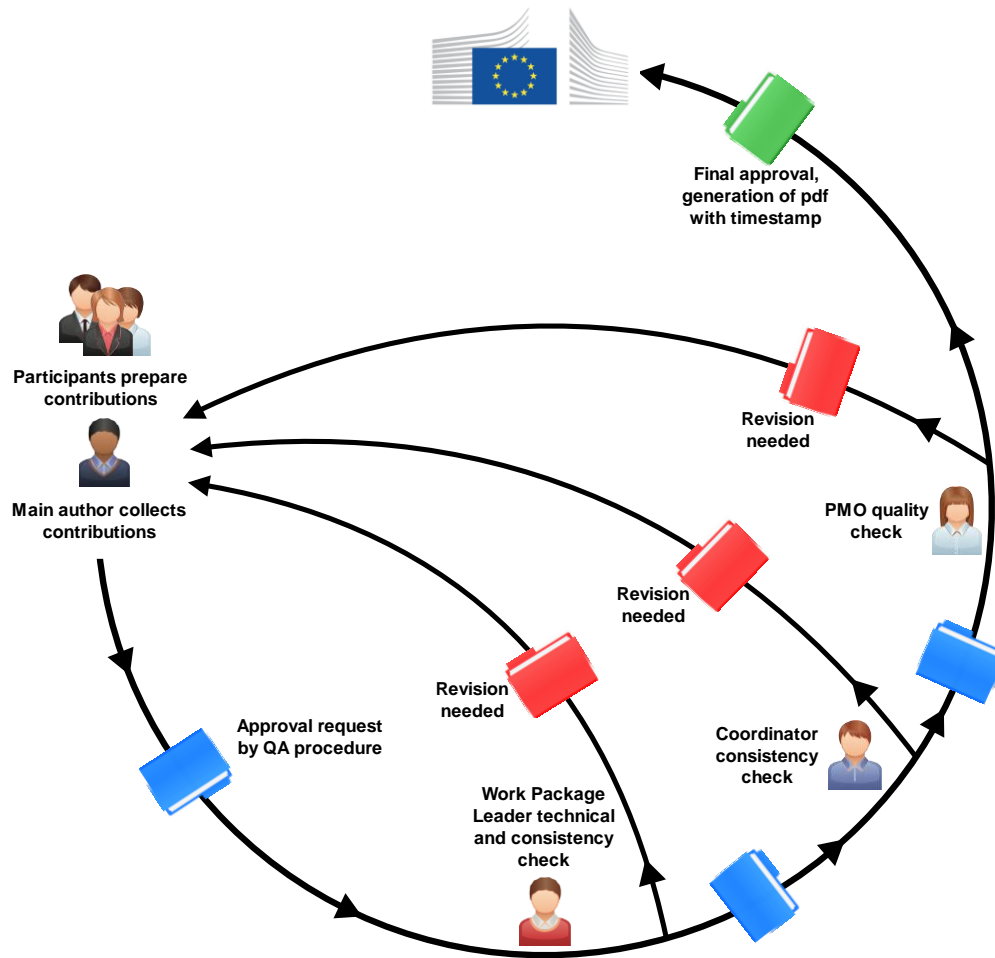
Figure 4: Workflow validation process for the deliverable submission

This deliverable preparation and validation process is as follows:

1. The main author, who is responsible for the elaboration of the document, asks all the involved participants to write their contribution to the document (c.a. 2 months before the delivery date).

2. After gathering and consolidating all contributions, the main author issues the draft version of the report with his/her own procedures. He/She then uploads the draft deliverable on the Workflow tool, also providing the abstract and the names of contributors.

3. The WP leader will receive an automated email stating that the deliverable is available for review. The WP leader then reviews the technical content of the document. If modifications are needed, the WP leader rejects the document and provides comments. The FLEXX automatically notifies the author that the deliverable needs to be improved. Once the updates are implemented, the main author uploads the revised deliverable on the Workflow, and the process begins anew until the WP leader validates the document.

4. If/when the WP leader validates the deliverable, the FLEXX automatically notifies the Coordinator (next in line for review) that the deliverable can be reviewed. At this point the process above repeats until the coordinator validates the document as well. Once this happens, the PMO (LGI) is notified that the document can be finalized following a final check. Once this is done, the FLEXX will generate the cover pages (with logos, timestamps, etc.), and the document is ready for submission to the EC

6.2.2. Reviews of technical deliverable by experts

Technical deliverable will be reviewed by competent experts chosen among the members of the External Advisory Board (EAB), the Internal Advisory Board (IAB) or any other expert before validation by the WP leader. The WP leader and the project coordinator assign the expert(s) for revision of the technical deliverables. For this process to be effective, deliverables are to be sent to EAB and/or IAB six weeks before the due date of the deliverable.

All technical deliverables are verified and validated according to this procedure.

6.3. Preparation of other technical documents

This section provides guidance on the preparation of other technical documents, non-contractual reports, support documents and progress meeting minutes.

For these documents, the steps are similar to those described in the previous section but the procedure is simplified.

- The partners can use their own Quality Assurance (QA) procedures for the preparation of METIS documents. Alternatively, METIS templates can be used without any reference to the internal QA of the beneficiaries involved.

- The validation and the corresponding timestamp of the WPL and Project coordinator appear on the second page of the document.

In the case of joint meetings concerning more than one work package, all concerned WPLs shall approve the minutes.

The templates for meeting minutes and for other technical documents are included in the METIS collaborative platform.

6.4. Preparation of contractual reporting document

According to the grant agreement, the coordinator is responsible for issuing the periodic reports (financial report and activity report) to the EC. The procedure to prepare these reports starts from the top level of the project and goes down through the various management levels. The reporting is divided into a financial part and a technical part. To ensure high quality and timely reporting, the PMO will use the approach outlined below. Being responsible for the execution of the entire reporting process, the PMO will provide support to the coordinator to ensure the quality of this reporting.

For the financial part of the reporting, the illustration below describes the process:
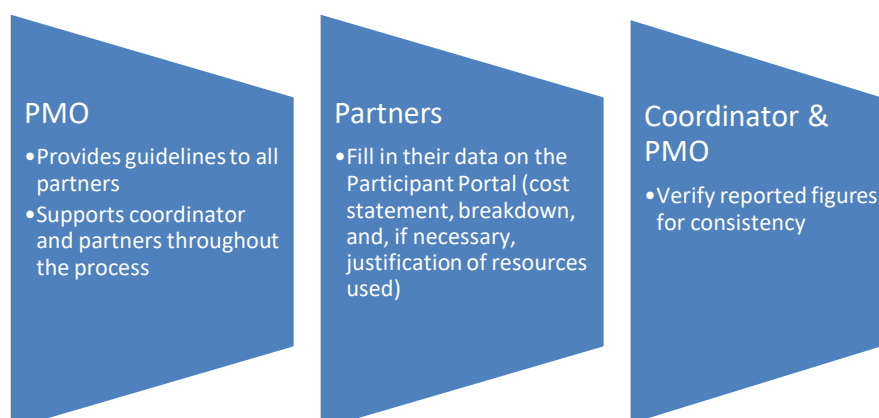
PMO
- Provides guidelines to all partners
- Supports coordinator and partners throughout the process

Partners
- Fill in their data on the Participant Portal (cost statement, breakdown, and, if necessary, justification of resources used)

Coordinator & PMO
- Verify reported figures for consistency

Figure 5: The financial reporting process

On the other hand, for the reporting of the activities (project progress) the process is as follows:

Figure 6: The technical reporting process

7. Publications

The beneficiaries can submit articles to peer-reviewed journals or present communications at conferences on the studies performed in **METIS.**

> For articles, an acknowledgement of the Commission's support has to be included: *"The research leading to these results has received funding from the Euratom research and training programme 2014-2018 under grant agreement No 945121".*

For presentations to conferences, it is strongly recommended to use the METIS Power Point presentation template (available on the web collaborative platform). The minimum requirement is to use the project logo. Moreover, the EU logo should be added for acknowledgement of the EURATOM support. The following acknowledgement of the Commission's support shall be included: **"***This project has received funding from the Euratom research and training programme 2014-2018 under grant agreement No 945121".*

The submitted and final versions of the articles and communications must be uploaded in the collaborative web platform work folder of the relevant WP and then published in the "Publications" folder.

All partners should take appropriate measures to engage with the public and the media about the project and to highlight the Community financial support. Any publicity, including at a conference or seminar or any type of information or promotional material, must specify that the project has received Community research funding and display the European emblem with appropriate prominence.

Figure 7: European emblem