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Project Acronym: **ER-flow**

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Building an European Research Community through Interoperable Workflows and Data

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D1.1 Project Management Structure and Information System

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2 Status and Change History

Status:	Name:	Date:	Signature:
Draft:	Stephen Winter	10/10/2012	n.n. electronically
Reviewed:	Gabor Terstyanszky	17/10/2012	n.n. electronically
Approved:	Gabor Terstyanszky	19/10/2012	n.n. electronically

Version	Date	Pages	Author	Modification
1.0	09/10/2012	all	S. Winter	creating the first version of the report
1.1	11/09/2012	09-11	S. Winter	describing document storage tool (DocDB)
	12/09/2012	12-13	S. Winter	describing event management tool (INDICO)
2.0	15/10/2012	all	S. Winter	full complete version of the report
2.1	17/10/2012	all	G. Terstyanszky	reviewing the report
final	19/10/2012	all	S. Winter	revising the report based on the reviewer's comments



3 Glossary

CO	Confidential
DocDB	EGI Document Database
DoW	Description of Work
EAC	Ethical Advisory Board
INDICO	Integrated Digital Conference
PDF	Portable Document Format
PAM	Project Administration Manager
PC	Project Coordinator
PMB	Project Management Board
PQM	Project Quality Manager
PU	Public
QR	Quality Reviewer
SMB	Support Management Board
SSP	SHIWA Simulation Platform
SVN	Subversion version control system
USB	User Steering Board
WP	Work package
WPL	Work Package Leader



4 Introduction

The aim of this deliverable is to identify and describe the tools selected by the project consortium in order to produce, manage and disseminate information about the project. These tools will help to distribute information among the project partners and to coordinate activities of the work packages. They will also enable dissemination of this information outside the project for example forwarding it to EC and research communities inside and outside Europe. These tools will help to manage the ER-flow project efficiently, effectively and smoothly to achieve the project objectives.

The project management information system includes web pages, document management tool, e-mail lists, electronic conference tools and organisation structures.

In this document we describe the elements of the project management information system and tools, particularly what they are and provide information how to use them.

5 Project Management Structure

The Description of Work (DoW) described the project management structure. This section will give a short overview of this structure referring to the DoW and list persons who are involved in the boards and committees of the project management structure.

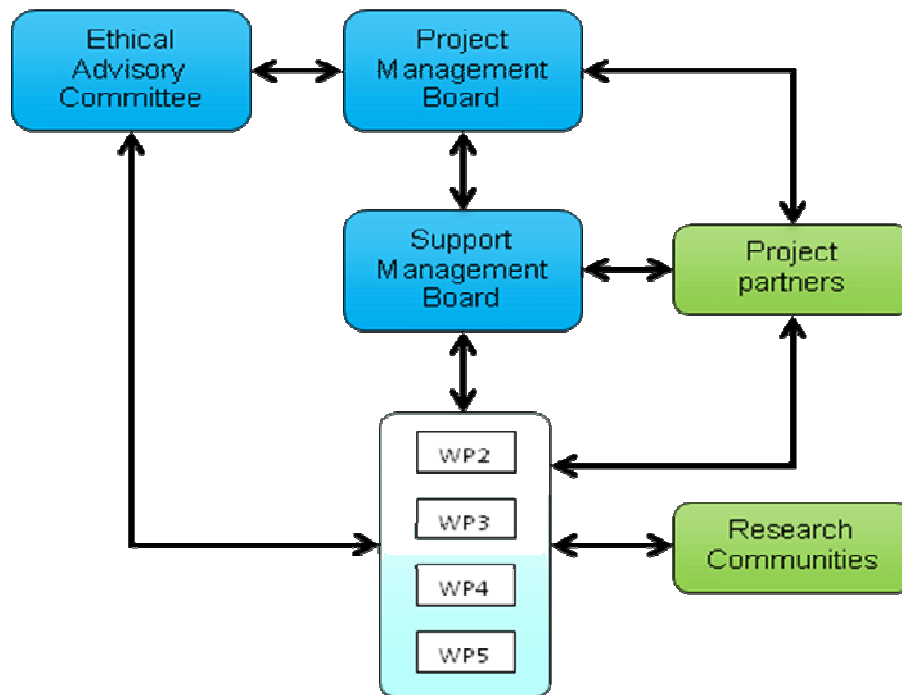


Figure 5.1: Management structure of the project

The project consortium held the first Project Management Board (PMB) meeting at the ER-flow kick-off meeting. The PMB overviewed the project management structure and did not propose any modification to this structure. PMB nominated persons as members of project boards and committees. See the details below.

Project Management Board PMB

PMB is chaired by the Project Coordinator (PC) and the Project Administrative Manager (PAM) plus local coordinators of each partner. The first PMB meeting at the kick-off meeting nominated S. Winter as PAM.

- Chair: G. Terstyanszky, Project Coordinator, UoW
- Members: S. Winter, Project Administrative Manager, UoW
- P. Kacsuk, Local Coordinator, MTA-SZTAKI
- J. Montagnat, Local Coordinator, CNRS
- G. Sipos, Local Coordinator, EGI.eu
- S. D. Olabbarriaga, Local Coordinator, AMC
- S. Herres-Pawlis, Local Coordinator, LMU
- R. Grunzke, Local Coordinator, TUD,
- B. Bentley, Local Coordinator, UCL
- G. Pierantoni, Local Coordinator, TCD
- C. Vuerli, Local Coordinator, INAF



Among other activities and responsibilities the Project Administrative Manager (PAM) will support PMB activities.

Project Administrative Manager

Person: S. Winter, UoW

Support Management Board SMB

SMB is chaired by the Project Coordinator and its members are the work package leaders (WPL).

Chair: G. Terstyanszky, Project Coordinator (PC)

Members: S. Winter, WP1 Leader, UoW
K. Varga, WP2 Leader, MTA-SZTAKI
G. Terstyanszky, WP3 Leader, UoW
J. Montagnat, WP4 Leader, CNRS
S. D. Olabbarriaga, Local Coordinator, AMC

PMB and SMB discussed the Quality Management strategy of the ER-flow project and nominated the PQM.

Project Quality Manager PQM

Person: S. Winter, UoW

Ethics Advisory Committee EAC

PMB nominated S. D. Olabbarriaga as the EAC chair considering that applications of the Life Science community may raise most of the ethical issues. The chair will later invite and nominate the three members of this committee who will represent the other three user communities involved in the project.

Chair: S. D. Olabbarriaga, AMC

Members: to be nominated later by the EAC Chair

User Steering Board USB

USB contains one representative of each supported research community involved in the project consortium. Later it will be extended with representatives of new research communities that will be supported by the ER-flow project.

Chair: B. Bentley, Helio-Physics community, UCL

Members: A. Costa, Astro-Physics community, INAF
S. Herres-Pawlis, Computational Chemistry, LMU
S. D. Olabbarriaga, Life Science community, AMC



6 Project Information System

6.1 ER-flow web site

The ER-flow project has created the ER-flow web site, available at www.erflow.eu. It will be described in detail in the D2.1 ER-flow dissemination and communication tools deliverable. In this report we give a short overview of the current and planned features and services of this web site.

The screenshot shows the ER-flow website homepage. At the top, there is a navigation bar with 'WELCOME', 'SHIWA PROJECT', and 'EVENTS'. The main content area is divided into several sections:

- Upcoming events:** A calendar for October 2012 with 'ER-Flow kick-off' highlighted on the 18th.
- Welcome to the ER-Flow website!:** An 'About ER-Flow' section describing the project's aim to build a European Research Community to promote workflow sharing and investigate interoperability of scientific data.
- Sign In:** A form with fields for 'Email Address' (containing '@erflow.eu') and 'Password', and a 'Remember Me' checkbox.
- Public Relations:** Contact information for the PR Team and Project Coordinator (Dr. Gabor Terstyanzsky).
- Project Partners:** A list of partner institutions including University of Westminster (UoW), Magyar Tudományos Akademia, Centre National de la Recherche Scientifique (CNRS), Stichting European Grid Initiative (EGI.eu), Technische Universität Dresden (TUD), Ludwig-Maximilians-Universität München (LMU), University College London (UCL), Trinity College Dublin (TCD), and Istituto Nazionale di Astrofisica (INAF).
- News:** Two news items: 'ER-flow project is looking for communities to support' and 'ER-flow project started today'.

Figure 6.1 ER-flow web site

Currently the web site includes a short overview of the ER-flow project, and provides access to the SHIWA project web site and to the SHIWA Simulation Platform (SSP). Although the SHIWA project has concluded, the technologies delivered by SHIWA, especially the SSP, and support components such as the SHIWA web site, are central components of the ER-flow project.

The ER-flow web page lists the project partners and details of the Project Coordinator and ER-flow PR team. It also contains a News section that includes two news items: “ER-flow project is looking for new communities to support” and “ER-flow project started today”. The



web site also contains a calendar of past and future events. The web site will build a corporate image of the project in order to gain significant external visibility. The project consortium will put significant effort into keeping the information up to date. It will present project goals and relevant achievements, the latest papers published by project partners and a list of the latest relevant events. The web site incorporates public and protected (or private) sections. The public section will provide information for project members:

- contact details of the partners
- information about on-going activities
- relevant links
- information about meetings (dates, minutes, presentations, travel) information about other events
- articles published

The protected sections can be accessed after login on the web site main page. The password protected private section (or intraweb pages) will provide sensitive information for project members about:

- final versions of the project deliverables
- other important documents (Description of Work, Consortium Agreement, list of deliverables with their submission schedules etc.)
- deliverable and report templates
- contact details of all project members
- project committees and boards with their contact details
- mailing lists of the project and work packages
- useful information, e.g. check list for organizing events

6.2 ER-flow document repository

The SHIWA project (the precursor of ER-flow) used SVN but because in the ER-flow project no computer code will be developed, a document storage system is considered to be more appropriate.

The project consortium investigated other options and decided to use the EGI Document Database (DocDB) to handle the project's administrative, financial and technical information. DocDB is a collaborative document server which enables management and sharing of documents among groups of up to several hundred people. DocDB consists of three parts: a relational database which stores information about the documents; a file system hierarchy used for storing the documents themselves; and a suite of CGI scripts which provide coherent access to both sets of information. Information maintained in the database includes author(s), title, topic(s), events(s), creation or modification dates, revision number, abstract, keywords, document type, pointers to the actual document files, and access restriction



information. DocDB manages document versioning in a MySQL database. Changes to a document result in a new version of the document. Old versions remain available, providing historical archiving. Different versions allow different access restrictions, so documents can be developed in private and then released. Access to DocDB is controlled by CGI scripts that run on users' computer. When a document is submitted to DocDB, the document is copied (from either a local disk or an html address) to a directory located on the DocDB web server.

Considering the features and services of DocDB and SVN the project consortium selected DocDB because they both offer similar features and services in most aspects but DocDB provides more convenient access to documents. DocDB does not require any deployment effort to access documents - in contrast to SVN.



Figure 6.2 Login to DocDB

In DocDB documents are allocated to groups. Groups can be browsed in a public and protected mode. Access to particular entries inside groups depends on the entry settings defined by the entry owners. To create new documents/events or to access protected documents/events users need an EGI Single Sign On account (SSO). Not having it they should request an account at www.egi.eu/sso and send the account name to the ER-flow group admins: G. Sipos, G. Terstyanszky and Kitti Varga. They add users to the relevant ER-flow groups. As a next step they have to log-in at www.egi.eu/sso with their SSO username and password.

The ER-flow admins have created two groups (one for all project partners and another for members of the Project Management Board) on DocDB. These groups are available at:

- er-flow-all <https://www.egi.eu/sso/group/ER-flow-all>
- er-flow-pmb <https://www.egi.eu/sso/group/ER-flow-PMB>

They will create further groups for work packages and sub-groups representing tasks of the work packages. Further groups will be created according to demands.



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Single Sign On

Group ER-flow-PMB

Group description
ER flow project PMB

Group usage

group type	used for
DocDB	Group determines members of Document server group

Group owners

#	user name	full name	gender	organisation	postal address	email address
1	sipos	Gergely Sipos	♂	EGI.EU	Stichting European Grid Initiative, 140 Science Park, 1098 XG Amsterdam, The Netherlands	gergely.sipos@egi.eu
2	tega1952	Gabor Terstyanszky	♂	University of Westminster	115 New Cavendish Street, W1W 6UW London, United Kingdom	terstyg@wmin.ac.uk
3	kittka	Kitti Varga	♀	MTA SZTAKI	MTA SZTAKI LPDS, 1518 Budapest, Pf. 63., Hungary	vargaki@sztaki.hu

Group members

#	user name	full name	gender	organisation	postal address	email address
1	silviado	Silvia Olabbarriaga	♀	Academic Medical Center of the University of Amsterdam	Bioinformatics Laboratory, KEBB, AMC PG Box 22700, 1100 DE Amsterdam, The Netherlands	s.d.olabbarriaga@amc.uva.nl
2	sipos	Gergely Sipos	♂	EGI.EU	Stichting European Grid Initiative, 140 Science Park, 1098 XG Amsterdam, The Netherlands	gergely.sipos@egi.eu
3	tega1952	Gabor Terstyanszky	♂	University of Westminster	115 New Cavendish Street, W1W 6UW London, United Kingdom	terstyg@wmin.ac.uk
4	kittka	Kitti Varga	♀	MTA SZTAKI	MTA SZTAKI LPDS, 1518 Budapest, Pf. 63., Hungary	vargaki@sztaki.hu
5	winterse	Stephen Winter	♂	University of Westminster	Centre for Parallel Computing, School of Electronics and Computer Science, University of Westminster, 115 New Cavendish St, London W1W 6UW	s.c.winter@westminster.ac.uk

Figure 6.3 ER-flow project PMB group

G. Sipos, G. Terstyanszky and K. Varga as admins also set up and manage the ER-flow folder. It is possible to set up subfolders under the ER-flow folder and add events to them. Admins can grant event manager or content manager access to particular events to anyone who is in SSO. This will happen on demand on an event-per-event basis.

6.3 ER-flow Project Calendar

The project will use the already existing, but re-named SHIWA calendar, using the Google Calendar tool to publish and disseminate the ER-flow project related events and deadlines. This way the both the SHIWA and ER-flow websites will show the same events without the loss of past events and their details. Visitors to the ER-flow website can directly see past events and by following links in the calendar can browse the materials related to these events.



6.4 ER-flow Event Management

Considering the experience of the SHIWA project the ER-flow project will use the Integrated Digital Conference (INDICO) tool along with the Doodle poll tool to organise meetings and events.

6.4.1 The Integrated Digital Conference (INDICO) tool

INDICO facilitates the management of conferences, events, meetings and workshops. The INDICO (Integrated Digital Conferencing) Project was a European project, a joint initiative of CERN, SISSA, University of Udine, TNO, and Univ. of Amsterdam. The main objective was to create a web-based, multi-platform conference storage and management system. INDICO allows the storage of documents and metadata related to real events.

INDICO is open source software released under the GNU General Public License. This has enabled its adoption by several institutions and organisations around the world. There is community behind this tool which includes third-party developers who contribute to its code. There is an active user community, which almost every day provides new suggestions and bug reports. This contributes substantially to the degree of agility with which the INDICO project currently works, providing immediate bug fixes, patches, and user support.

INDICO supports the management of the whole lifecycle of simple and complex events such as conferences, lectures, presentations, meetings, workshops, etc. It has a tree-like structure organized into categories where each category may either contain other categories or simple events. INDICO offers the following features:

- Automatic web page creation for the events,
- Event evaluation surveys,
- Automatic notifications (i.e. automatically remembering all the participants in a meeting that will take place on the current day);
- Conference management support
 - registration form customization
 - on-line payment support.
 - abstract submission and reviewing.
- An integrated room booking system,
- Integrated support for videoconferencing software (i.e. VRVS11).
- Information exportation in different formats: RSS feeds, iCalendar, MARXML, for instance.
- Multilingual interface (internationalization).
- Support for different time zones.



- Accessible and usable interface.

The ER-flow project set up an INDICO folder inside the EGI.eu INDICO deployment which is available at <https://indico.egi.eu/indico>.

The project PR team already uploaded the agenda of the ER-flow kick-off meeting and the presentations given at the meeting.

Kick-off meeting
chaired by Gabor Terstyanszky (University of Westminster)
from Wednesday, October 10, 2012 at 14:00 to Friday, October 12, 2012 at 12:00 (Etc/Greenwich)
at University of Westminster

Manage

Go to day

Wednesday, October 10, 2012

14:00 - 14:05	Welcome 5'	Speaker: Gabor Terstyanszky (University of Westminster)	▾
14:05 - 14:45	Overview of the SHIVA project 40' (CLG.11)	Speaker: Peter Kacsuk (MTA SZTAKI)	▾
14:45 - 15:15	Overview of the ER-flow project 30'	Speaker: Gabor Terstyanszky (University of Westminster)	▾
15:15 - 15:45	Coffee break		
15:45 - 17:00	WP1 Project Management session 1h15'	WP1 overview (objectives, tasks, milestones, deliverables) Project management structure PMB, SMB, Ethical Advisory Committee Financial & technical management User Forum + User Steering Committee Quality Manager Interim, annual and final reports administrative, financial & technical reports forms & templates Cooperation with other projects	▾
		Material: Slides	▾
17:00 - 18:00	DMR meeting 1h0'		▾

Figure 6.4 ER-flow kick-off on INDICO

6.4.2 Doodle

The dates of the ER-flow events will be chosen using DOODLE poll web tool. Doodle can be accessed at www.doodle.com.

The ER-flow project will use Doodle to schedule an event, for example a project meeting, or to make a choice among.

6.5 Project Communication Infrastructure

The project has established electronic mailing lists to provide a mechanism for internal project communication.

Project partners' e-mail list: erflow-all@erflow.eu

The project will create further mailing lists considering requests by project partners and research communities to address specific application- or technology-oriented issues. These mailing lists will be tailored to forward the relevant messages to all interested players and parties.

6.6 Project Conferencing Tools

In order to ensure the efficiency of the virtual project team and the governing bodies of the project between the actual physical project meetings, virtual meetings will help the communication and decision making of the members of the ER-flow project. The project



consortium investigated Adobe web conferencing, Skype conferencing and video conferencing as options.

6.6.1 Video conference

There are different ways to participate in the video conference:

1.) Using an H.323 terminal for video and audio conferencing

- MS Windows platform

NetMeeting (audio and video). This is bundled with Windows XP, but cannot be found in the start menu. Users can run it with the command "conf" typed in a run window or at command prompt.

- Mac OS/X platform

XMeeting: <http://xmeeting.sourceforge.net/pages/index.php>

- Linux platform Ekiga: <http://www.gnomemeeting.org/>

Users have to register with their clients at the (Free Zone) gatekeeper. It is detailed here how to do it at: <http://www.vidkonf.niif.hu/index.php?mn=3&sm=3&lg=en>

2.) Video streaming using a web browser

The project will consider either QuickTime or RealPlayer plugin

6.6.2 Skype conference

The monthly work package meetings will use the Skype conference facility. The partner who initiates the conference call, should choose from the Menu Call, then Start a Skype Conference Call and add the members.

Remark. A maximum of 9 members can participate in a Skype conference but in recent practice it has been found that with over 5-6 members, the connection may become unstable.

6.6.3 Adobe® Connect™ web conference

CNRS can provide Adobe Connect web conferencing facilities to the partners, the participants of the web conference only need to have a web browser and Adobe Flash Player. When users log in to Adobe Connect their credentials can be authenticated directly against the organization's LDAP server.

The project consortium recommends to use Skype conferencing because first, it is quite straightforward to set it up; secondly all partners use it on regular basis.



7 Organisation of Project Events and Meetings

The ER-flow project will organise project meetings and work package meetings. The work package meetings will be maximum three day-long meetings involving all partners and work packages. At these meetings work packages will present their progress and achievements, will identify and raise any delays and problems and will raise and outline future plans and schedule them. The project will combine the project meetings with board meetings such as meetings of the Project Management Board, of the Support Management Board, of the Ethics Advisory Committee, etc. The work package meetings will involve either one work package or more to discuss specific application or technical support specific issues. They will be maximum two day-long meetings. The WP2 work package will organise dissemination and training events as satellite events of major European events for example EGI Community Forum and Technical Forum and community events of the supported and targeted research communities.

The project will use Doodle and INDICO to organise and manage project events and meetings.

The project meetings will be initiated and organised by the Project Coordinator while work package meetings by one of the Work Package Leader involved in the meeting using Doodle and INDICO. They will use Doodle to select the date and time of events and schedule them and INDICO to manage and run them.

The ER-flow project will have four project meetings:

- Kick-off meeting London, 10-12 October 2012
- 2nd project meeting Ireland, March or April 2013
- 3rd project meeting Italy, September or October 2013
- 4th project meeting to be selected, March or April 2014



8 Conclusion

This deliverable presents the chairs and members of different project boards which and managers who will be involved in administrative and technical project management. The Project Management Board meeting held at the kick-off meeting nominated chairs, members and managers, and voted on them.

The ER-flow project set up the project management information system in September 2012. This information system contains five major components. First, there is the ER-flow web site, which provides single point of entry for all information about the project. Second, the ER-flow groups in EGI DocDB enable managing project documents, Third and fourth, INDICO and Doodle poll will support organisation and management of project events. Fifth, Skype will be used to have “virtual” project and work package meetings. This report outlines the project management information system describing all the above mentioned components.

The ER-flow project held the kick-off meeting in London between 10th and 12th October 2012. G. Terstyanszky, the Project Coordinator, proposed to delay the submission of D1.1 deliverable because the project partners should discuss the structure and components of the project management information system, and agree on it. The Project Management Board should also overview the project management structure and nominate board members and chairs and confirm them.