

**EGI-Engage**

Quality plan for Period 1

D 1.1

|  |  |
| --- | --- |
| **Date** | 8 June 2015 |
| **Activity** | NA1 |
| **Lead Partner** | EGI.eu |
| **Document Status** | DRAFT |
| **Document Link** | <https://documents.egi.eu/document/2487>  |

Abstract

This document defines how the quality process for the project EGI-Engage will be implemented to ensure that the project outputs are delivered fit-for-purpose. This will be achieved by ensuring that all project management processes are conducted in a quality manner (quality assurance) and by developing quality criteria for the outputs themselves (quality control).

**COPYRIGHT NOTICE**



This work by Parties of the EGI-Engage Consortium is licensed under a Creative Commons Attribution 4.0 International License (http://creativecommons.org/licenses/by/4.0/). The EGI-Engage project is co-funded by the European Union Horizon 2020 programme under grant number 654142.

**DELIVERY SLIP**

|  |  |  |  |
| --- | --- | --- | --- |
|  | ***Name*** | ***Partner/Activity*** | ***Date*** |
| **From:** | Małgorzata Krakowian | EGI.eu/NA1 | 5/06/2015 |
| **Moderated by:** | Diego Scardaci | INFN/JRA1 |  |
| **Reviewed by** | Yin Chen | EGI.eu |  |
| **Approved by:** |  |  |  |

**DOCUMENT LOG**

|  |  |  |  |
| --- | --- | --- | --- |
| ***Issue*** | ***Date*** | ***Comment*** | ***Author/Partner*** |
| **v.1** |  |  |  |
| **...** |  |  |  |
| **...** |  |  |  |
| **v.n** |  |  |  |

**Contents**

[1 Introduction 5](#_Toc421523334)

[1.1 Project Quality Management 5](#_Toc421523335)

[1.2 Quality Management in EGI-Engage 6](#_Toc421523336)

[1.2.1 Plan Quality Management 6](#_Toc421523337)

[1.2.2 Quality Assurance 6](#_Toc421523338)

[1.2.3 Quality Control 7](#_Toc421523339)

[2 Quality guidelines 8](#_Toc421523340)

[2.1 Project communication and outputs 8](#_Toc421523341)

[2.1.1 Templates 8](#_Toc421523342)

[2.1.2 Acknowledgement 9](#_Toc421523343)

[2.1.3 Software 9](#_Toc421523344)

[2.2 Document management 10](#_Toc421523345)

[2.2.1 Content 11](#_Toc421523346)

[2.2.2 Formats and tools 11](#_Toc421523347)

[2.2.3 Document naming convention 11](#_Toc421523348)

[2.2.4 Document metadata 12](#_Toc421523349)

[2.2.5 Repository metadata 13](#_Toc421523350)

[2.2.6 Access to documents 13](#_Toc421523351)

[2.3 Review process for deliverables and milestones 13](#_Toc421523352)

[2.3.1 Roles 14](#_Toc421523353)

[2.3.2 Workflow of review process 15](#_Toc421523354)

[3 Metrics 17](#_Toc421523355)

[3.1 Key Performance Indicators 18](#_Toc421523356)

[3.2 Activity Metrics 20](#_Toc421523357)

[3.2.1 NA1 – Project Management 20](#_Toc421523358)

[3.2.2 NA2 – Strategy, Policy and Communication 20](#_Toc421523359)

[3.2.3 JRA1 – E-Infrastructure Commons 21](#_Toc421523360)

[3.2.4 JRA2 – Platforms for the Data Commons 22](#_Toc421523361)

[3.2.5 SA1 – Operations 23](#_Toc421523362)

[3.2.6 SA2 – Knowledge Commons 24](#_Toc421523363)

[4 Gender plan 25](#_Toc421523364)

[5 Conclusions 26](#_Toc421523365)

# Introduction

This document defines how the quality process for the project EGI-Engage will be implemented to ensure that the project outputs are delivered and satisfies the specified quality requirements. This will be achieved by ensuring that all project management processes are conducted in a quality manner (quality assurance) and by developing quality criteria for the outputs themselves (quality control).

## Project Quality Management

Project Quality Management, according to Project Management Body of Knowledge 5th edition[[1]](#footnote-1), includes all the processes and activities performed that determine quality policies, objectives and responsibilities to ensure the project will satisfy the requirements. It uses policies and procedures to implement quality management system and support continuous improvement process. It addresses both quality management of the project and quality of deliverables of the project.

The goals of Quality Management as defined in Project Management Body of Knowledge are:

* **Customer satisfaction:** to ensuring that customer expectations are properly recognized and met;
* **Prevention:** to prevent mistakes;
* **Continuous improvement:** to recognize and recommend necessary changes;
* **Management responsibility:** to ensure participation of all members of the project team to meet project objectives.

It also contains three processes:

* **Plan Quality Management** goal is to identify the quality requirement of the project and document steps required to demonstrate project compliance. It provides guides and directions on how quality will be managed and validated.
* **Quality Assurance** is a systemic pattern of action to ensure that the product conforms to quality requirements / standards. It is a management function such as reviews or a process for checking work items. It ensures quality project management processes.
* **Quality Control** monitors and checks correctness of the project outcomes to assess performance and recommend necessary changes. It inspects the accomplished work to ensure its alignment with the project scope.

EGI-Engage project will use structure of the quality processes defined in Project Management Body of Knowledge to plan and organize quality management activities as described in next section.

## Quality Management in EGI-Engage

In EGI-Engage, Quality Manager role has been explicitly assigned to an institution staff, Małgorzata Krakowian, who is responsible for creation and management of Plan Quality Management, Quality Assurance and Quality Control processes within EGI-Engage project.

### Plan Quality Management

Within this process, the Quality Manager is responsible for creation and maintenance of EGI-Engage Quality Plan[[2]](#footnote-2) to provide clear guidelines for all work package leaders how quality will be managed and validated. The guidelines cover such topics as project communication, document management and review process.

Quality plan will be reviewed by the project team and report on quality status will be produced on yearly basis to meet changed conditions or objectives during the project’s life span with following schedule:

* Project month 03: D 1.1 Quality plan for Period 2
* Project month 14: D 1.3 Report of quality status and quality plan for Period 2
* Project month 29: D 1.5 Report of quality status for Period 2

### Quality Assurance

Quality Assurance process will be responsible for assessing if quality guidelines (see section 2), defined in Quality Plan, are being followed and whether are still appropriate for the project.

Project outputs (Milestones and Deliverables[[3]](#footnote-3)) will be reviewed according to review process (see 2.3) for deliverables and milestones described in section 2.3.

Regular review of project outputs will be performed through project reports, produced according to following schedule:

* Project Month 06: Milestone 1.2 First intermediate report
* Project Month 12: Project Periodic Report (first period)
* Project Month 18: Milestone 1.3 Second intermediate report
* Project Month 24: Project Periodic Report (second period)
* Project Month 30: Project Periodic Report (third period)
* Project Month 30: Project Final report (entire duration)

Building regular reviews will ensure that quality improvement can be carried out throughout the life of the project.

Communication with Activity Managers will be ensured through Activity Management Board (AMB) which will be responsible for regularly monitoring the progress of the project and of the day-to-day management of the individual activities within the project will be undertaken by the Activity Managers. AMB has representation from all the work packages.

### Quality Control

Quality Control process will collect and monitor the Key Performance Indicators (KPIs) and activity metrics (see section 3). Based on results, the process will identify necessary improvements and suggest implementation to appropriate project boards. It will be also responsible for collection of lessons learned, the learning gained from performing the project.

# Quality guidelines

## Project communication and outputs

All outputs produced by staff activities within EGI-Engage (funded and unfunded effort) shall be recorded so that it can be reported by the project. The following procedures shall be used:

* Meetings run by EGI-Engage: The meetings shall be recorded in the EGI Indico server[[4]](#footnote-4) and all presentations and material provided for the meeting, including any minutes, shall be attached to the appropriate agenda page.
* Presentations, Posters, and publication: Presentations and/or papers presented at other meetings attended by EGI-Engage staff shall be recorded in the EGI document repository[[5]](#footnote-5). A link to the meeting and a summary of the outcome should be recorded in the ‘notes’ section of the document. A dedicated EGI-Engage tag is available to qualify documents, milestones, papers, presentations and other documentation relevant to the project.
* Mailing Lists: As the majority of the communication within the project will be electronic having a coherent record of that work is essential. All mailing lists must use the EGI.eu based mailing lists which allow groups defined within the single sign on to be linked to mailing lists, access to wiki space, document access, etc.
* Requirements and actions gathering: Requirements and actions gathering should be performed through EGI RT system[[6]](#footnote-6) with group based access control provided through the EGI SSO system.
* Websites: The main website[[7]](#footnote-7) is used for all ‘official’ ‘static’ content. Individual services produced within the project have their own hostname in the egi.eu domain. The wiki[[8]](#footnote-8) should be used for all dynamic content being maintained or developed within each project activity. It has group based access control provided through the EGI SSO system. Other third party websites or wikis should not be used to host EGI-Engage related material in order that the egi.eu domain becomes the definitive source of project information.

### Templates

All outputs from EGI-Engage, e.g. project deliverable, presentations, and technical reports, should use EGI-Engage templates available on main website under Logo and templates[[9]](#footnote-9) section.

### Acknowledgement

The following acknowledgement statements should be used for EGI-Engage outputs unless the output already uses one of the recognised project templates, where appropriate acknowledgements are already included:

* For materials such as documents, presentations and reports, this statement should be used:

*This material by Parties of the EGI-Engage Consortium is licensed under a Creative Commons Attribution 4.0 International License[[10]](#footnote-10). The EGI-Engage project is co-funded by the European Union (EU) Horizon 2020 program under Grant number 654142 http://go.egi.eu/eng*

* Work other than software that cannot be reused without explicit permission
*Copyright © 2015-2017 Parties of the EGI-Engage Consortium. The EGI-Engage project is co-funded by the European Union (EU) Horizon 2020 program under Grant number 654142.*
* For scientific publications generated by efforts funded by the project
	+ To acknowledge EGI and the project
	*This work used the European Grid Infrastructure (EGI) and is co-funded by the EGI-Engage project (Horizon 2020) under Grant number 654142.*
	+ To acknowledge EGI, the project and specific countries providing resources
	*This work used the European Grid Infrastructure (EGI) through resources from Country\_1, Country\_2, … and is co-funded by the EGI-Engage project (Horizon 2020) under Grant number 654142.*

### Software

Quality of produced software within EGI-Engage project will be ensured by the adoption of EGI Services management standard - FitSM[[11]](#footnote-11).

FitSM is an international standard developed by FedSM project as a lightweight IT service management to support organisations and distributed organisations assisting them in defining service management processes and responsibilities in order to provide value to their customers. This is done through defining a set of requirements, general principles that encompass subsequent processes in order for Services Providers to comply with their customer’s expectation for quality, guaranty and value.

During FedSM project lifetime EGI.eu and its partners gathered experience in IT service management and developed processes and procedures[[12]](#footnote-12) will be applied to software being produced by the EGI-Engage project. After FedSM project maintenance and support of the standard will be taken over by IT Education Management Organization[[13]](#footnote-13) what will ensure that chose standard is sustainable solution.

The development activities within the project will augment capabilities of existing open source software. The resulting software code, tools and interfaces developed as part of the EGI-Engage vision will be released as open source code and the full access will be provided via publicly available source code repositories such as GitHub, SourceForge, Subversion (SVN), Concurrent Version System (CVS) etc.

Software developers will be able to choose their preferred source code repository to better integrate with existing practices, nevertheless they will need to

1. ensure that the contribution is openly accessible,
2. add the metadata information needed to enable reuse,
3. communicate the URL to the consortium.

In order to comply with the open access policy and maximise possibility for reuse of results, EGI-Engage software code, tools and interfaces that fall under the joint ownership will be published under an OSI-approved license[[14]](#footnote-14). If no existing OSI license is being used, we propose the adoption of the Apache 2.0 license. Free and unrestricted access to research result is a measurable barrier to uptake by SME’s and can slow down innovation in measurable terms[[15]](#footnote-15), and the consortium will make it a priority to comply with the Horizon 2020 Mandate in full support of Europe 2020 Initiative’s Economic Growth Agenda.

## Document management

All documents, presentations and other material that form an official output of the project (not just milestones and deliverables) are placed in the document repository[[16]](#footnote-16) to provide a managed central location for all material.

Access to documents is linked to the EGI single sign on (SSO) system[[17]](#footnote-17), which can be used to generate an account and password. Once logged into the document repository using the created account, it is possible to create new document items or update existing ones through the ‘Create or change documents or other information’ link.

### Content

All documents will be written in English and use document formats described in the following section. In addition to the fields and sections already described in the document template, deliverables must include an Executive Summary and, if required, one or more Annexes. References to external document and a Glossary to terms not listed on the website must be recorded. The correct capitalisation of the project name is EGI-Engage. English date format must be used (DD/MM/YYYY) when required.

### Formats and tools

The following tools and formats will be recognised within the project:

* Word Processing: ‘Word Format’ allowing its use on MS Office on Windows/Mac and OpenOffice on Linux
* Spreadsheet: ‘Excel Format’ allowing the use of MS Office on Windows/Mac.
* Presentation: ‘Powerpoint Format’ allowing the use of MS Office on Windows/Mac.

Final version of all formal documents (milestones and deliverables) must be available in PDF format.

### Document naming convention

Filenames must use the following format in order to link any item back to other versions placed in the document repository. The filename format is:

EGI-Engage<DOCUMENT IDENTIFIER>-V<VERSION>

|  |  |
| --- | --- |
| DOCUMENT IDENTIFIER | The document identifier is dependent on the document type. If the document is:* Deliverable: Use the deliverable name: e.g. D1.1, D5.5, etc.
* Milestone: Use the milestone name: e.g. M1.2, M5.4, etc.
* Activity: Use the activity code: e.g. SA1, NA3, etc.
* Committee/Board: Use an acronym based on the committee or board name: e.g. TCB, OMB, UCB, USAG, SPG, etc.
* Other: If the source of the material cannot be identified then ignore this section.
 |
| VERSION | This is the version number generated by the document repository for the particular repository identifier.Versioning rule:* +0.1 – new version of draft
* +1.0 – new version of approved document
 |

Example: EGI-Engage-M3.1-V1.0.pdf

The title of documents uploaded to document repository must be in the following format:

<DOCUMENT IDENTIFIER> Title (from the first page of the document)

Example: M3.1 User Support Contacts

### Document metadata

The cover page of the document (along with the footer running throughout the document) contains metadata (marked in yellow) that needs to be reviewed and completed:

* Title: This must be the title of the milestone or deliverable as described in the Description of Work.
* Deliverable/Milestone code: e.g. D1.1 or M1.1. Delete if not required.
* Document identifier: With a correctly formulated filename (see ‘Naming Convention’) this field can be updated in MS Word by highlighting, right clicking and selecting ‘Update Field’.
* Date: This field records the last date the document was saved and can be updated in MS Word by highlighting, right clicking and selecting ‘Update Field’.
* Activity: Enter the work package name (WP1, WP2, etc.) that is producing this document.
* Lead Partner: Enter the recognised short name within the EGI-Engage project of the lead partner.
* Document Status: This will move through the following states for milestones and deliverables:
	+ TOC (Table of Contents)
	+ Draft
	+ Review
	+ AMB/PMB Review
	+ Final
* Document Link: The URL in the EGI document repository that provides access to the document.
* Abstract: An abstract describing the document’s contents and main conclusions. On submission of the final version this should be entered into the relevant field in the repository metadata.

### Repository metadata

When creating the entry in the document repository there are a number of compulsory metadata fields that need to be completed. Where possible these values should be copied from the corresponding document metadata. The Repository Metadata includes the following items:

* Title
* Abstract
* Keywords
* Notes and changes
* Media type
* Submitter: Select the person submitting the document.
* Authors: Select the people involved in writing significant portions of the document.
* View: Select the groups able to view the document. Documents that are drafts may be restricted to the groups within the project that are working on the document. Documents that are complete must be marked public.
* Modify: The ‘office’ group must me marked as able to modify the document.
* Topics: Select the topics relevant for the material. These will generally include ‘EGI-Engage’, committee/board that the material is coming from
	+ Any output from EGI-Engage would minimally have the topics ‘EGI-Engage’
	+ There are also documents that are generated within the community that go beyond the scope of just the EGI-Engage project (e.g. operational policy documents) would minimally have the topics from ‘EGI’ category selected.

### Access to documents

Access to internal or confidential documents is controlled at SSO group level, with SSO IDs being assigned to particular groups depending on their permissions to view or modify documents. Public documents are available to all, without restriction or the requirement to log in. Restricted documents can only be viewed and/or modified by logging in using an account with the correct permissions.

## Review process for deliverables and milestones

The formal outputs from the project (milestones and deliverables) pass through a formal review process. The review process provides staged deadlines during the process to ensure the output is available to the EC at the end of the project month (PM) that the material is due.

Other outputs from the project, such as documents that are neither deliverables nor milestones, may use modified versions of the official document templates and are also reviewed internally.

Depending of the type of milestone and deliverable different inputs to the process are required. Following types are used corresponding expected input:

* **R:** Document, report
	+ Input: full report
* **DEM:** Demonstrators, pilots, prototypes, plan design
	+ Input: Delivery of the product, short 1-4 page report
* **DEC:** Website, press & media actions, events
	+ Input: Delivery of the product, short 1-4 page report
		- Events: in addition satisfaction survey should be performed
* **OTHER:** software, technical diagram etc.
	+ Non-user facing software
		- Input: delivery, UMD acceptance criteria process[[18]](#footnote-18), short 1-4 report based on stage rollout process outcome
	+ User facing software
		- Input: delivery, satisfaction survey, short 1-4 page report
	+ Other
		- Input: short 1-4 page report

The review process for a milestone and a deliverable is identical except for:

* Milestones are expected to have
	+ two reviews produced by a reviewer and the moderator;
	+ reviewers: 1 external, 1 Activity Managers Board member.
* Deliverables are expected to have
	+ three reviews produced by two reviewers and the moderator;
	+ reviewers: 1 external, 1 Project Management Board member, 1 Activity Managers Board member.

The reviewers are selected (one from each of EGI’s functional areas not involved in its production) from EGI’s functional areas (i.e. Operations, User Community, Technology and Policy).

### Roles

Roles in the review process are identified below:

* **Reviewer**: Responsible for providing a review of the document on the EGI review form so that responses from the document authors to the reviewer can be tracked. A change tracked version of the document can be provided with corrections for spelling, formatting and other minor issues. The reviewer is generally from the activity and organisation that is not responsible for producing the document.
* **Moderator**: Responsible for deciding in cases of conflicting reviews which elements of a review must be implemented by the author. The decision to follow or reject a reviewer’s comment must be tracked in the review document. The moderator is normally an EGI-Engage task leader not from the activity producing the document. Moderator is also reviewer.
* **Editor**: The person from the activity and the partner who is responsible for the document. They may rely on others within the activity to provide the information. The editor cannot be a moderator or reviewer.
* **Quality Manager (QM):** The project office provides administrative support for the process.
* **Shepherd**: The shepherd is a member of the AMB who is responsible for overseeing the production of the document. They will work with the Editor to ensure that the work is done in a timely manner, and report to the AMB on its progress (Normally the activity manager or their deputy).
* **AMB Chair**: This is Technical Director, or their deputy.

[NOTE: an individual could hold one or more of these roles if they are not in conflict with each other.]

### Workflow of review process

The workflow for the review process is described below. All steps are recorded in EGI Request Tracked tool.[[19]](#footnote-19)

|  |  |  |  |
| --- | --- | --- | --- |
| **Time before submission** | **Role** | **Action** | **Request Tracker Action** |
| >2 months | QM | Assign ticket in EGI RT to WP leader responsible for the document | Assigned to WP leader |
| 2 months | Shepherd | Assign Editor | Remains blank with CC to editor |
| 7 weeks | Shepherd | Ensure* the editor has provided the table of contents (optionally including notes as to the contents of each section)
* ToC has been circulated through AMS mailing list for comments
* the document is stored in DoCDB
 | Set state to ToC |
| 6 weeks | Shepherd | Shepherd is aware a draft* is available in the repository
* is under active development with revisions from the contributors
 | Set state to Draft |
| 5 weeks | Shepherd | The draft* is stable
* is undergoing review within the activity
* is nearly complete
 | Set state to Internal Review |
| 4 weeks | Shepherd | The document is ready for external review. | Set state to External Review |
| Immediately | Shepherd | Shepherd * notifies reviewer(s), moderator and AMB that the document is available for review
* confirm expected review completion date with reviewers
 | Enter completion date as Due Date in RT |
| Immediately | Shepherd | Notify the Editor that review is complete | Set state to Being Revised |
| Immediately | Editor | Notify the Shepherd an updated document is available | Set state to External Review |
| Immediately | Shepherd | The external review is complete.Notify the AMB that the document has completed external review | Set state to AMB Review |
| 1 week | AMB Chair | The PMB is emailed that the document is available for the PMB to review for 1 week | Set state to PMB Review |
| Deadline |  | A clean PDF version of the document is generated by the QM and placed in the document repository with updated meta-data | Set state to With EC |

# Metrics

The objectives of EGI-Engage project are as follows:

Objective 1 (O1): Ensure the continued coordination of the EGI Community in strategy and policy development, engagement, technical user support and operations of the federated infrastructure in Europe and worldwide.

Objective 2 (O2): Evolve the EGI Solutions, related business models and access policies for different target groups aiming at an increased sustainability of these outside of project funding. The solutions will be offered to large and medium size RIs, small research communities, the long-tail of science, education, industry and SMEs.

Objective 3 (O3): Offer and expand an e-Infrastructure Commons solution

Objective 4 (O4): Prototype an open data platform and contribute to the implementation of the European Big Data Value.

Objective 5 (O5): Promote the adoption of the current EGI services and extend them with new capabilities through user co-development;

In order to achieve these objectives, a number of Key Performance Indicators (KPIs) have been defined to support management to follow up on project’s activities quality and project’s activities progresses.

In addition, each of the activity set within a specific work package is managed by an Activity Manager who will ensure provision of a list of activity metrics that will provide progress status against the activity. The Quality Manager with Activity Manager will control that the defined metrics are Specific, Measureable, Attainable, Relevant and Time-bound (SMART) prior to allowing activity participants to report against them.

KPIs and activity metrics will be tracked using the Metrics Portal[[20]](#footnote-20). Values are either collected manually or extracted as applicable from a number of EGI tools. Metrics are gathered every 6 months as part of report process. These are reported in intermediate and periodic reports, together with an analysis.

## Key Performance Indicators

These indicators will be available on <http://www.egi.eu/about/egi-engage/metrics.html> and updated on a periodic basis (every 6 month).

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **Objective** | **Metric ID** | **Metric** | **Type** | **Polarity** | **Target PM12** | **Target PM24** | **Target PM30** |
| O4 | KPI.1.JAR2.OpenData | Number of open research datasets that can be published, discovered, used and reused by EGI applications/tools | Cumulative | Up | 0 | 10 | 20 |
| O1, O2 | KPI.2.SA1.Intergation | Number of RIs and e-Infrastructures integrated with EGI | Cumulative | Up | 9 | 11 | 13 |
| O1, O2 | KPI.3.SA1.Software | Number of new registered software items and VM appliances | Per period | Up | 50/50 | 60/60 | 70/70 |
| O1, O2 | KPI.4.SA1.Cloud | Number of providers offering compute and storage capacity accessible through open standard interfaces | Cumulative | Up | 25 | 30 | 35 |
| O5 | KPI.5.SA2.Users | Number of researchers served by EGI | Cumulative | Up | 40 000 | 45 000 | 47 000 |
| O3 | KPI.6.JRA1.AAI | Number of users adopting federated IdP | Cumulative | Up | TBD | TBD | TBD |
| O5 | KPI.7.SA2.Users | Number of research communities served | Per period | Up | 20 | 20 | 20 |
| O2 | KPI.8.SA1.Users | Number of VO SLAs established | Cumulative | Up | 4 | 8 | 10 |
| O5 | KPI.9.NA2.Communication | Number of scientific publications supported by EGI | Cumulative | Up | NA | NA | NA |
| O2 | KPI.10.NA2.Communication | Number of relevant authorities informed of the policy paper on procurement | Cumulative | Up | 5 | 20 | 25 |
| O5 | KPI.11.SA1.Users | User satisfaction | Average | Up | 4 | 5 | 5 |
| O2 | KPI.12.NA2.Industry | Number of services, demonstrators and project ideas running on EGI for SMEs and industry | Cumulative | Up | 2 | 7 | 10 |
| O5 | KPI.13.SA2.Support | Number of delivered knowledge transfer events | Cumulative | Up | 15 | 30 | 45 |
| O3, O5 | KPI.14.SA1.Size | Number of compute available to international research communities and long tail of science | Per period | Up | TBD | TBD | TBD |
| O3, O5 | KPI.15.SA1.Size | Number of storage available to international research communities and long tail of science | Per period | Up | TBD | TBD | TBD |
| O2, O5 | KPI.16.SA2.Support | Number of international support cases (for/with RIs, projects, industry) | Cumulative | Up | 30 | 60 | 90 |
| O3, O5 | KPI.17.SA1.Size | Number of compute resources available to the long tail of science | Cumulative | Up | 300 | 500 | 500 |

## Activity Metrics

This section lists the activity metrics for each of EGI-Engage activity.

### NA1 – Project Management

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Metric ID** | **Metric** | **Task** | **Type** | **Polarity** |
| M.NA1.Quality.1 | Percentage of deliverables and milestones delivered on time | 1.3 | Per period | Up |

### NA2 – Strategy, Policy and Communication

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Metric ID** | **Metric** | **Task** | **Type** | **Polarity** |
| M.NA2.Communication.1 | Percentage of articles, news, blog posts about or contributed by user communities and NGIs/EIROs with respect to the total of items published in EGI’s channels | 2.1 | Per period | Up |
| M.NA2.Communication.2 | Number of unique visitors to the website | 2.1 | Per period | Up |
| M.NA2.Communication.3 | Number of pageviews on the website | 2.1 | Per period | Up |
| M.NA2.Communication.4 | Number of news items published | 2.1 | Per period | Up |
| M.NA2.Communication.5 | Number of events with participation of EGI Champions | 2.1 | Per period | Up |
| M.NA2.Communication.6 | Number of case studies published | 2.1 | Per period | Up |
| M.NA2.Communication.7 | Attendee-days per event | 2.1 | Per period | Up |
| M.NA2.Strategy.1 | Number of EGI impact assessment reports circulated to the stakeholders | 2.2 | Per period | Up |
| M.NA2.Strategy.2 | Number of MoUs involving EGI.eu or EGI-Engage as a project | 2.2 | Cumulative | Up |
| M.NA2.Strategy.3 | Number of SLAs established paying customers | 2.2 | Cumulative | Up |
| M.NA2.Industry.1 | Number of engaged SMEs/Industry contacts | 2.3 | Cumulative | Up |
| M.NA2.Industry.2 | Number of establish collaborations with SMEs/Industry (with MoU) | 2.3 | Per period | Up |
| M.NA2.Industry.3 | Number of requirements gathered from market analysis activities | 2.3 | Per period | Up |

### JRA1 – E-Infrastructure Commons

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Metric ID** | **Metric** | **Task** | **Type** | **Polarity** |
| M.JRA1.AAI.1 | Number of communities whose Identity Provider framework integrates with EGI AAI | 3.1 | Cumulative | Up |
| M.JRA1.Marketplace.1 | Number of entries in the EGI Marketplace (i.e. services, applications etc.) | 3.2 | Cumulative | Up |
| M.JRA1.Accounting.1 | Number of kinds of data repository systems integrated with the EGI accounting software | 3.3 | Cumulative | Up |
| M.JRA1.Accounting.2 | Number of kinds of storage systems integrated with the EGI accounting software | 3.3 | Cumulative | Up |
| M.JRA1.OpsTools.1 | Number of new requirements introduced in the roadmap | 3.4 | Cumulative | Up |
| M.JRA1.OpsTools.2 | Number of probes developed to monitor cloud resources | 3.4 | Per period | Up |
| M.JRA1.eGrant.1 | Number of user requests handled in e-GRANT | 3.5 | Per period | Up |

### JRA2 – Platforms for the Data Commons

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Metric ID** | **Metric** | **Task** | **Type** | **Polarity** |
| M.JRA2.Cloud.1 | Number of VM instances managed through AppDB GUI | 4.2 | Average | Up |
| M.JRA2.Cloud.2 | Percentage of cloud providers providing snapshot support | 4.2 | Per period | Up |
| M.JRA2.Cloud.3 | Percentage of cloud providers providing VM resizing support | 4.2 | Per period | Up |
| M.JRA2.Cloud.4 | Number of OCCI implementation supporting OCCI 1.2 | 4.2 | Per period | Up |
| M.JRA2.Cloud.5 | Number of new OCCI implementations for existing or new CMFs. | 4.2 | Per period | Up |
| M.JRA2.Integration.1 | Number of European cloud providers in the federated Astronomy community cloud | 4.3 | Cumulative | Up |
| M.JRA2.Integration.2 | Number of virtual appliances shared | 4.3 | Cumulative | Up |
| M.JRA2.Integration.3 | Number of different datasets replicated across CADC and EGI | 4.3 | Cumulative | Up |
| M.JRA2.Integration.4 | Number of EUDAT services integrated with the HTC and Cloud platforms of EGI | 4.3 | Cumulative | Up |
| M.JRA2.Integration.5 | Number of open research datasets replicated in the federated cloud for scalable access by iMARINE VREs | 4.3 | Cumulative | Up |
| M.JRA2.Integration.6 | Number of research clouds that interoperate with EGI federated cloud: community clouds, integrated, peer | 4.3 | Cumulative | Up |
| M.JRA2.AcceleratedComputing.1 | Number of batch systems for which GPGPU integration is possible to be supported through CREAM | 4.4 | Cumulative | Up |
| M.JRA2.AcceleratedComputing.2 | Number of Cloud Middleware Frameworks for which GPGPU integration is supported and implemented | 4.4 | Cumulative | Up |
| M.JRA2.AcceleratedComputing.3 | Number of level 3 disciplines with user applications that can use federated accelerated computing | 4.4 | Cumulative | Up |

### SA1 – Operations

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Metric ID** | **Metric** | **Task** | **Type** | **Polarity** |
| M.SA1.Operations.1 | Amount of federated HTC compute capacity (EGI participants and integrated) | 5.1 | Cumulative | Up |
| M.SA1.Operations.2 | Amount of federated HTC storage capacity (EGI participants and integrated): (Disk, Tape) | 5.1 | Cumulative | Up |
| M.SA1.Operations.3 | Amount of allocated resources (storage) allocated through a EGI centrally managed pool of resources | 5.1 | Cumulative | Up |
| M.SA1.Operations.4 | Amount of allocated resources (logical cores) allocated through a EGI centrally managed pool of resources | 5.1 | Cumulative | Up |
| M.SA1.Operations.5 | Number of new products distributed with UMD | 5.1 | Per period | Up |
| M.SA1.SecurityOperations.1 | Number of security policies and procedures updated, reviewed and adapted to support new services | 5.2 | Per period | Up |
| M.SA1.Platforms.1 | Number of gCUBE VREs instantiated on the Federated Cloud for the iMARINE community | 5.3 | Cumulative | Up |
| M.SA1.Platforms.2 | Number of CPU time consumed by e-CEO challenges (hours \* cores) | 5.3 | Per period | Up |

### SA2 – Knowledge Commons

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Metric ID** | **Metric** | **Task** | **Type** | **Polarity** |
| M.SA2.UserSupport.1 | Number of training modules produced and kept up-to-date | 6.2 | Cumulative | Up |
| M.SA2.UserSupport.2 | HTC Absolute normalized time to a reference value of HEPSPEC06 (excluding OPS and dteam) per 1 level disciplines | 6.2 | Cumulative | Up |
| M.SA2.UserSupport.3 | HTC Relative increase normalized time to a reference value of HEPSPEC06 (excluding OPS and dteam) per 1 level disciplines | 6.2 | Per period | Up |
| M.SA2.UserSupport.4 | Relative increase of users per 1 level disciplines | 6.2 | Per period | Up |
| M.SA2.UserSupport.5 | HTC Number of Low/Medium/High Activity VOs and total | 6.2 | Per period | Up |
| M.SA2.UserSupport.6 | Number of VM instantiated in Federated Cloud per 1 level discipline | 6.2 | Per period | Up |

# Gender plan

Mainstreaming genders in a project is a task that falls under the responsibility of the project’s coordinator. However, the actual gender mainstreaming within activities allows for considering that all project’s partners are to consider how they will mainstream gender issues within and outside their projects’ activities. Most of the partners in EGI-Engage are organisations with an established policy of equal gender opportunities. The EGI-Engage management is committed to ensure equal opportunity, according to EU rules and guidelines, when hiring new project staffs. In parallel, the project coordinator will strive to keep the institutions that are part of the consortium positively motivated towards gender issues by raising awareness at management level.

# Conclusions

The quality plan within EGI-Engage project identifies the quality requirement of the project and documentation steps required to demonstrate project compliance. It provides guidance and directions on how quality will be managed and validated. It also describes Quality Assurance and Quality Control processes within the project.

Quality Assurance process will be responsible for assessing if quality guidelines (section 2), defined in Quality Plan, are being followed and weather are still appropriate for the project.

A multi-phase review mechanism will be put in place to ensure that the formal output of the project is of a high quality. This takes place through technical review within the activity responsible for the initial work, review external to the producing activity to groups within the project that are consumers of the work, review across all activities of the project through the Activity Management Board, and then finally alignment with the managerial aspects of the project through the Project Management Board. While specifically focused on the project’s milestones and deliverables, this process of open review is used across all aspects of the project.

Quality Control process will collect and monitor the Key Performance Indicators (KPIs) and activity metrics (section 3). Metrics will provide a continuous approach to monitoring the performance of an activities or tasks. This document defined a set of metrics that will be used to monitor the performance of each activity and its tasks within the EGI-Engage project. Overall progress towards these metrics will be summarised and analysed periodically and recommendations will be made for the future of the infrastructure.

1. <http://www.pmi.org/PMBOK-Guide-and-Standards.aspx> [↑](#footnote-ref-1)
2. [https://wiki.egi.eu/wiki/EGI-Engage:Quality\_Plan](https://wiki.egi.eu/wiki/EGI-Engage%3AQuality_Plan) [↑](#footnote-ref-2)
3. [https://wiki.egi.eu/wiki/EGI-Engage:Deliverables\_and\_Milestones](https://wiki.egi.eu/wiki/EGI-Engage%3ADeliverables_and_Milestones) [↑](#footnote-ref-3)
4. <http://indico.egi.eu> [↑](#footnote-ref-4)
5. <http://documents.egi.eu> [↑](#footnote-ref-5)
6. <http://rt.egi.eu> [↑](#footnote-ref-6)
7. <http://egi.eu> [↑](#footnote-ref-7)
8. <http://wiki.egi.eu> [↑](#footnote-ref-8)
9. <http://www.egi.eu/about/logo_templates> [↑](#footnote-ref-9)
10. <http://creativecommons.org/licenses/by/4.0/> [↑](#footnote-ref-10)
11. <http://fitsm.eu> [↑](#footnote-ref-11)
12. <https://wiki.egi.eu/wiki/Instructions_for_Production_Tools_teams> [↑](#footnote-ref-12)
13. <http://www.itemo.org/> [↑](#footnote-ref-13)
14. <http://opensource.org/licenses> [↑](#footnote-ref-14)
15. Houghton, John, Alma Swan, and Sheridan Brown. “Access to Research and Technical Information in Denmark.” Monograph, April 2011. http://eprints.soton.ac.uk/272603/ [↑](#footnote-ref-15)
16. <http://documents.egi.eu/> [↑](#footnote-ref-16)
17. <https://www.egi.eu/sso/> [↑](#footnote-ref-17)
18. <https://wiki.egi.eu/wiki/EGI_Verifier_Guideline> [↑](#footnote-ref-18)
19. <http://rt.egi.eu/> [↑](#footnote-ref-19)
20. <http://metrics.egi.eu/> [↑](#footnote-ref-20)