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Abstract (for dissemination)	Guidelines for the production, distribution, evaluation and submission for HTML (internet) and written deliverables

Executive Summary

The document describes guidelines and procedures for the distribution of the deliverables in the project. This document will be updated as the ELECT project progresses. This is the second version of the Project Self Assessment Guide.

The first section gives a brief introduction to the document.

Sections 2 and 3 give an outline of the project's resources (email lists, web site, CONSORTIUM ONLY site), and how partners can use them for the discussion and submission of written and software deliverables.

Sections 4 and 5 give guidelines on document development and discussion and the testing of software deliverables.

Section 6 gives guidelines on the financial management of the project, and includes a number of useful examples.

Section 7 contains general guidelines and points to remember when planning, developing and completing deliverable tasks.

Addendum A provides a template for deliverables.

Table of contents

Introduction

Quality assurance is a necessary precondition for the full realisation of the project's potential benefits. Reflection and constructive criticism are necessary if lessons are to be learned. The following document sets out guidelines and procedures to ensure that all deliverables and reports outlined in the technical annex of the project are proposed, evaluated and submitted in an efficient and effective manner, allowing the consortium to meet deadlines with the best possible output.

The first five sections of the document deal with the technical day to day aspects of the project, giving clear technical instructions on how to go about using the project's distribution and storage utilities. The final two sections deal with management and quality assurance, giving guidelines and advice for partners to ensure that goals and objectives are met in the project's time-scales.

This document is not meant to replace any part of the Technical Annex, rather its purpose is to fill in the gaps, and to act as a resource for partners, which along with the TA, gives a clear concise description of the project, and how to set about achieving its end goals.

This document will be maintained by the QA co-ordinator and the project co-ordinator.

General principles

The consortium has followed six general principals for building evaluation into the description and the development the work carried out within the ELECT project.

1. Identify the project's goal in terms of the four key criteria used by the Commission for proposal evaluation and Annual Project Review:
    - Quality, relevance, innovation and impact
    - Community added value and contribution to relevant EU policies
    - Contribution to economic development and social objectives
    - Partnership, resources and management

2. Translate the goal into a project objective.

3. Translate the objectives into operational goals and identify the means to achieve them.

4. Describe the baseline data against which the project will measure its progress.

5. Describe what measure of 'success' will be used.

6. Make it happen by:
    - Allocating a specific Workpackage to assessment and evaluation or explicitly including assessment and evaluation elements in the project-specific Workpackages
    - Describing how the output of the on-going evaluation will feed into the project management, as evaluation is only useful when it informs management in a timely fashion.

Inter-Consortium Communication and Distribution

The ELECT web site

The ELECT public web site is located at the following web address http://lrc.csis.ul.ie/research/projects/Elect_Project_Web/. This site is intended to be the major point of dissemination for the project, containing general information about the project along with news, HTML versions of given presentations and all public ELECT reports.

All submissions for the public site must be emailed to the LRC, along with an attached mail explaining the desired location for submission. To ensure a good volume of traffic, the site has been submitted to all major search engines. Consortium members are encouraged to make submissions and to put links to the site whenever possible.

All queries received from visitors to the web site will be forwarded to the consortium mailing list or the relevant partner, depending on the nature of the query.

The consortium section of the ELECT web site is located at the following web address http://lrc.csis.ul.ie/research/projects/Consortium/ and is password protected.

The purpose of the consortium section is to give easy access to the project archive.

All updates to the consortium section of the web site are listed on the consortium only main page.

The ELECT consortium only site

The ELECT consortium only site is located at the following web address http://lrc.csis.ul.ie/research/projects/Consortium/ and is split into three sections:

- Project Management Information
- Information on Supporting Organisations
- Deliverables and Reports

The CONSORTIUM ONLY site administrator is responsible for installing the archive, providing access control, providing information on how to use the site, providing top level information about its contents and regularly backing up and virus checking the volume. Details on how to submit documents to the site can be found in the submission of deliverables section.

The ELECT mailing list

Specific mailing lists are maintained for the ELECT Expert Council and supporting organisations. They contain at least one member from each participating organisation.

Specialised sub-lists will be created wherever the need arises. Partners will be informed of their creation, and will be given the opportunity to subscribe.

Meetings

A meeting schedule has been specified for the first year of the project. The timetable is as follows:

Month	Location	Start	Finish	Agenda
4	Luxembourg	03 May 02	03 May 02	Kickoff meeting
8	Limerick	25 October 02	25 October 02	Project review
12	Luxembourg	23 January 03	23 January 03	Project review

The agenda for each meeting should be available at least a week beforehand, and should be based on an initial list of topics submitted by the co-ordinator. The hosts responsibilities include providing access to a photocopier, providing adequate meeting facilities and assisting in the booking of accommodation.

Submission of deliverables

Written deliverables

The submission of written deliverables in draft or final form must adhere to the following guidelines.

- All files must be scanned for viruses using up to date scanning software.
- All files must be named according to the agreed convention – DxxVxxS.rtf (D stands for deliverable, V for version and S for status (i.e. PD – pre draft, D – draft, PF – pre final, F - final).
- All documents must be based on the deliverable document template, contained on the CONSORTIUM ONLY site.
- A README file must also be submitted. The README file's content and form must be based on the README template contained on the CONSORTIUM ONLY site.
- The technical manager checks the submission for completeness and errors, places the documents in the appropriate locations, and informs the submitting partner.
- Once confirmation has been received, the submitting partner can then send a notification email to the main ELECT list. The mail should contain the location and file details, a document development timetable, a list of feedback targets, and a feedback deadline.

Deliverables Checklist

EDC-52005 ELECT/27644	
WP #	
Deliverable	
Format (Print, HTML, CD..)	
Version	
Date	
Coordinator	
Comments	

QA Steps performed (as per definition in QA Document)

QA Step	Done [name]	Date
Virus check OK		
File naming conventions according to definition		
Documents in RTF format		
README file supplied		
Deliverable document templates used (Readme, Docs)		
Completeness		
Errors checked and corrected		
Correct submission (Post, CD, Web, Courier)		
Notification email to ELECT distribution list containing feedback targets and feedback deadline		

Web Deliverables

Due to the multi-component nature of ELECT, setting out a finite list of steps and procedures for the delivery of web components would be impractical. The section will set out some general steps to be followed, but the key to avoiding delay and confusion with software deliverables is consultation with the technical manager before submission.

Submissions must include both the original source code, and the compiled executables. Submissions must also be accompanied by detailed installation instructions. The technical manager then follows these instructions and sees if everything works as it should. The package is then put into the appropriate directory on the CONSORTIUM ONLY site. The location is forwarded to the submitting partner, who sends this along with feedback targets and deadlines to the main consortium mailing list.

Below are some general guidelines to be followed when submitting software deliverables.

- As well as executables, submissions should include source code and detailed instructions.
- Technical manager tests all instructions and performs tests.
- The platform for testing is Windows 2000.
- The technical manager should be the contact for installation support, once the pre-install has been performed.

This section will be subject to change as the project progresses. An improved QA system has been implemented, since the January 2003 review meeting. QA procedure must be performed on all deliverables written or otherwise by the QA co-ordinator, and signed off by the project co-ordinator before the submission of the deliverables.

Document development and discussion

To ensure quality and punctuality with deliverable documents, it is important to define procedures for their development and discussion.

Four main development stages are envisaged for a deliverable document.

- Pre-Draft – Containing headings and selective developments on them for discussion (xxx pdn.doc, e.g. deliverable pd1.doc).

- Draft – Containing text for all headings and sections. It is expected that all targeted partners read this version and offer their comments via the mailing list (xxx dn.doc, e.g. deliverable d1.doc).

- Pre-Final – The document as it would be submitted as a deliverable, but still open to minor modifications (xxx pfn.doc, , e.g. deliverable pf1.doc).

- Final – The document to be submitted to the commission (xxx fn.doc, , e.g. deliverable f1.doc)

When a document is submitted at the pre-draft stage, the responsible partner should also submit a development timetable, detailing when they expect the next stages of the document to be finished. This timetable should give ample opportunity for discussion, while respecting the deadlines laid out in the technical annex.

It is the submitting partner’s responsibility to point out who they wish to have feedback from, and when they expect it. If a partner cannot provide feedback by the date required, it is the responsibility of that partner to notify the author of the document.

All versions of the documents must be viewed and signed off by the QA co-ordinator, where it is checked for style, format, presentation and accuracy. Their findings are then passed on to the author, who changes the document accordingly.

The final version must be signed off by the QA co-ordinator and the project co-ordinator, and is then submitted to the user advisory board for acceptance.

Testing and debugging of software deliverables

Once a software package has been submitted to the CONSORTIUM ONLY site, its test cycle begins. The developer decides the exact duration and format of this. As a general rule, there will be 2 test/bug fix cycles for software submitted.

As with deliverable documents, submitting partners must specify whom they expect will test and analyse the submitted software, as well as laying out timetables for feedback reports. Each report must contain detailed information about the user’s operating system and environment.

For each bug report the following should be made clear:

- What context did the bug occur in
- What were the symptoms
- How can the developer reproduce the bug
- Exact text of any error messages given

At regular intervals, the developers will analyse the bugs submitted to the ELECT mailing list, outlining the problem, and estimating how long it will take to rectify.

Each bug cycle performed by the developer will produce a new version of the package, which should be submitted to the CONSORTIUM ONLY site, and named accordingly.

Financial Management

The Financial Management procedures and systems adopted for the ELECT Project have been designed by the LRC to meet the criteria as contained in the Technical Annex – PART C Articles 18 – 24 - **in so far as the workings of these procedures are within the control of the LRC (e.g. the LRC cannot be held responsible for the accuracy or otherwise of Cost Statements submitted by the various partners.)**

The system and procedures implemented have been designed, and will be processed, by the Accounts Department of the University of Limerick together with the appointed ELECT Project Manager.

The following outlines the workflow and controls that are envisaged:

1. The University of Limerick have opened a special account to process EC receipts and partner payments. This account will be used for financial transactions in so far as they apply to the ELECT Project.

2. The following information will be maintained by the coordinator in an appropriate financial management system:

Budget Costs: This document provides Budget Cost Controls and Cumulative Variance Reporting for the project. The agreed Cost Breakdown – by Category and Partner – (Ref. Table – Advance and indicative breakdown of estimated eligible costs in the Technical Annex) - is stored as the Budget Control Cost figure. The Actual Cost figures will be updated, with details from the partner's six monthly Cost Statements. Cumulative Variance Analysis (Budget Cost .v. Actual Cost) will be available for control reporting.

Monies Received: This document provides data on all monies received from the EC in relation to the ELECT project. Entries are updated as they are processed. These documents are the basis of a full audit trail covering payments from the EC.

Payments: This document provides data on all payments made by UL to the various partners. Entries are updated as they are processed. These documents are the basis of a full audit trail covering payments to the consortium partners.

4. As contained in the Technical Annex, the implemented procedures will provide the standard financial reports requested by the EC.

Quality Assurance

Introduction

This section is based on the Adapt Guide to Project Self-Evaluation for Project Promoters, as outlined in the Technical Annex. Relevant sections have been chosen and adapted to suit the ELECT project's needs. The three main areas this section will examine are:

- Need analysis
- Integrity field testing
- External evaluation

Up to this point, this document has described the technical protocol to be followed in the day-to-day activities of the project. The areas outlined above will discuss more abstract guidelines, which can aid consortium members at every stage of ELECTs development.

Need Analysis

This step was the starting point of the project's life, where a need was discovered, and the project was proposed as a solution. So why include it as part of this document? One reason is that the project context changes throughout its lifecycle. This section will help identify whether changes have been substantial enough to alter the initial priorities of the project. The steps and guidelines in this section can also be applied to individual tasks involved in ELECT, with reference to the Technical Annex.

The purpose of need analysis is to establish the causes, nature and extent of a particular problem, clarifying the nature of the innovation needed while identifying people and organisations interested in tackling the needs and providing solutions to the problem.

Need analysis for any task must involve the consortium at some stage, where the idea is discussed. Consortium members can also suggest published research and existing resources to exploit. The key steps of a project task should wherever possible, be translated into a set of activities necessary to meet the assessed need or demand. At all times, the important client/user groups envisaged in the Technical Annex should be kept in mind.

All needs and objectives should be:

- Understood by all project members
- Possible to meet with the project's resources
- Be in time with the overall project objectives

Objectives should be SMART (single, measurable, achievable, realistic, time based). Meeting these objectives can be aided with detailed discussions at consortium meetings and on task specific email groups. With consultation and common sense, need analysis will lead to objective fulfilment.

Integrity Field Testing

This is the key step concerning the implementation stage. The purpose of field-testing is:

- To measure the success of an innovative activity as it progresses.

- To generate immediate feedback from practical experience which leads to the refinement and improvement of the innovation.
- To gather the evidence necessary to assess the effectiveness of the innovation as well as its wider relevance and applicability.

Information for field-testing can be gathered using the procedures and methods already described in this document, i.e. email lists, consortium meetings, software and written deliverable guidelines. Other methods that can be used include workshops, relevant user questionnaires and conference papers.

The next step is to analyse, summarise and interpret the information collected, establishing the current value and trend of each indicator of achievement. This information should then be fed back to the project participants, inviting them to discuss interim results and to feed back their views. Due to the limited resources of the project, feed back targets must be chosen. A good way to achieve this is the setting up of specific email lists, as discussed in section 2.3.

It is important to keep a record of changes made to the approach and methods of the project resulting from the feedback process, as is keeping a record of all information gathered during field testing (completed questionnaires, informal feedback).

The field testing stage of a project, or a specific part of it, should give important information on:

- What do partners think of approach methodologies and tools?
- Do the activities work towards meeting the project objective or is there a drift towards alternative objectives?
- What improvements to the approach or methods could give better results or a better end product?
- Can you determine the extent to which the needs of the target group are being met?

External Evaluation

External evaluation has already been seen to play a role in integrity field-testing. This section will give guidelines on how to go about setting up groups and activities that will give the information needed to further improve and make more relevant the final result of the project.

The ELECT Expert Council has already been assembled, in accordance with the Technical Annex. This group should be used as much as possible throughout the project's life cycle to guarantee results that will be useful to the largest number of potential users as possible. As mentioned in the previous section, workshops, questionnaires, informal discussion and conference participation are all good ways of gauging reaction to the project as a whole, and its specific parts.

Since the makeup of the EXPERT COUNCIL is diverse, these activities should reflect this. The feedback from a workshop involving only the Localisation Industry will differ significantly from one involving the Commercial Translation sector. It is unlikely that ELECT will satisfy all potential user needs, but by comparing and analysing individual group needs, the final result should be useful to them all. The same logic should be applied to questionnaires.

Information gathered from these EXPERT COUNCIL activities should be analysed and distributed as described in the field testing section. All group members should be given regular updates of the project's progress. It is expected that the EXPERT COUNCIL will grow over the lifetime of the project and will also be a useful tool for dissemination.

Addendum A: ELECT deliverable template

Project ref. no.	EDC-52005 ELECT/27644
Project title	**ELECT – The European Localisation Exchange Centre**

Deliverable status	Public/Restricted/Confidential
Contractual date of delivery	Month n
Actual date of delivery	Month n
Deliverable number	Dn.n
Deliverable title	***ELECT Self-assessment guide***
Type	Deliverable report/Web site/Terminology
Status & version	Predraft/Draft/Pre-final/Final, e.g. "Final 2.0"
Number of pages	N
WP contributing to the deliverable	WPn
WP / Task responsible	Partner name
Author(s)	*Author(s)*
EC Project Officer	*Brian Macklin*
Keywords	Keywords
Abstract (for dissemination)	Abstract

Executive Summary

Summary of the delivery contents on no more than one page.

Table of contents

Insert table of content, if possible generate automatically in MS WORD using ‘Formal’ style.

Heading one

TEXT

Heading two

TEXT

Heading three

TEXT