



Deliverable 8.1

Project Management Plan

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Deliverable factsheet

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Abstract:	This document includes the project management methods for the PBL3.0 project. It defines the document creation and exchange mechanisms and formats, the means of communication over the Web, content and function of the Web site, software versions and maintenance, and organization of meetings.
Keyword List:	Project, management, communication, website, format, meeting

Consortium

	<i>Role</i>	<i>Name</i>	<i>Short Name</i>	<i>Country</i>
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2.	Technology enhanced learning expert	Open University of the Netherlands	OUNL	Netherlands
3.	PBL expert	Aalborg University	AAU	Denmark
4.	Semantic and Learning analytics expert	University of Alcalá	UAH	Spain
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Executive Summary

The objective of PBL3.0 is to enhance Problem Based Learning (PBL) with Learning Analytics (LA) and Learning Semantics (LS) in order to produce a new educational paradigm and pilot it to produce relevant policy recommendations.

WP8 intends to ensure that the consortium will collaborate effectively and reach the objectives of the project, or even go beyond expectations, in the given timeframe. Furthermore, the WP is concerned with actual coordination of the project, interfacing with the European Commission, managing budget flows and so on.

The purpose of this document is to determine the methods, tools and guidelines that will be followed for managing the PBL3.0 project. Information included in this deliverable is valuable to all partners for ensuring smooth cooperation and communication within the consortium.

More specific, this deliverable focuses on the following management aspects and guidelines:

- Documents in the PBL3.0 project should be created following a specific, predetermined format and structure, named according to a specific naming convention and exchanged through email or through the project web site.
- Distant communication of partners will be achieved through email and through an email exploder set up specifically for the PBL3.0 consortium.
- A project web site will be prepared to be used for reaching out to the wide public.
- Software developed in the project will follow a specific versioning system and should be maintained by the partner responsible for its development.
- Meetings' organisation and minutes' recording will be performed according to specific processes and within predetermined timeframes.

1 Introduction

1.1 Scope

This deliverable specifies the methods, tools and guidelines that will be followed for managing the PBL3.0 project.

1.2 Audience

This deliverable is intended for internal use by the PBL3.0 consortium.

1.3 Structure

The rest of the document is structured as follows:

- Section 2 presents the tools, formats and processes to be used for creating and exchanging documents in the consortium.
- Section 3 presents details on the communication over the internet.
- Section 4 presents the overall purpose and structure of the project web site.
- Section 5 presents basic considerations on software versioning and maintenance.
- Section 6 presents administrative aspects of meetings' organisation and minutes preparation.
- Section 7 concludes the document.

2 Documents Creation and Exchange

This section determines rules and guidelines for the uniform creation and exchange of PBL3.0 documents.

2.1 Document creation tools

In order to ensure easy access to the project documents and to reduce potential editorial burdens, Microsoft Word and Excel will be used as standard tools for the project, together with PowerPoint. The minimum version is Microsoft Office 2007; the recommended one is Microsoft Office 2007. Should partners use Microsoft Office 2010 or later, they are strongly advised to use the 'Save As ... Office '2007' feature.

Documents for edited books, special issues for journals, and course notes that will be the products of the project could be prepared using other typesetting software, like LaTeX, if necessary.

However, a final document will always be in Adobe PDF format. To be archived all documents must be converted to PDF format. Manually prepared documents will be scanned and stored in PDF format.

2.2 Document types and formats

The format in use depends on document type. With regards to the document format to be used three different document types categories are envisaged in PBL3.0. These are:

1. *Documents for the Agency*: these documents include Deliverables, Interim and Final Progress Reports and Cost Statements.
2. *PowerPoint presentations* for internal and external use: e.g. for project meetings, reviews, presentation during workshops, exhibitions, conferences etc.
3. *Word documents for internal use*: e.g. Agendas, Minutes, technical contributions, other contributions etc.

The Project Coordinator will provide specific templates to be used by the Partners for all document types.

2.2.1 Deliverable template

The template to be used for creating and presenting all documents for the Agency (deliverables, progress reports etc.) will be created and distributed by the Project Coordinator.

The template and consequently all documents for the Agency will show the following pieces of information on the cover page:

- *Title and Logos*: the title of the project and the deliverable will be shown along with the relevant logos, such as the project logo, the EU flag¹ in order to acknowledge receipt of European Community funding² etc.
- *Editors and responsible organisation*: The names and organisations of the authors and editors of the document must be provided.
- *Date of delivery*: The submission date for the deliverable.
- *Version-status*: This field denotes the version of the document which may be in the forms of v1, v2, v01 etc. The status 'Final' denotes that the version of the document is the final and the submitted one. Otherwise, the document is of status "Draft".
- *Dissemination level*: In this field the list of persons or groups involved in the document distribution is reported. The dissemination level field can have one of the following possible values:
 - PU: The document is open and public to everyone
 - RE: The document is restricted to other programme participants (including the Commission Services and project reviewers)
 - CO: The document is confidential, only for members of the consortium (including EACEA and Commission services and project reviewers)

Right after the cover page, will follow the factsheet page including additional essential information for the deliverable:

- *Project details*: the project number, acronym and full title.
- *Deliverable details*: the deliverable title, relevant Work Package and due date according to the contract.
- *Authorship details*: the names and organisations of reviewers, contributors, reviewers and approvers.
- *Content details*: an abstract for the deliverable and relevant keywords.

Every deliverable will follow a specific predetermined structure (also shown in Figure 1) including the following sections:

- *Consortium*: list of partners in the consortium
- *Revision history*: The history page will be used to report version, date, modification reason, and organisation/author that have performed each respective and consecutive modification. Revision history should be maintained throughout deliverable's drafting period by the responsible partner. Versioning will be kept as follows:

¹ http://europa.eu/abc/symbols/emblem/download_en.htm

² See also article II.7 of Grant Agreement

- Version integers are kept for document submission to the EC. The first submission of a document to the EC will be marked as v1. If a second submission is needed, this will be v2 etc. Versions before the first submission to the EC should be marked as v0.
- Version decimals (in other words, releases) will be used for communication between partners. The first draft version to be communicated within the consortium will be vX.1, the second vX.2 etc.
- *Table of Contents*
- *List of figures*
- *List of tables*
- *List of abbreviations:* It summarises all the abbreviations and acronyms listed in the deliverable in alphabetical order. Acronyms should be scarcely used in the deliverable, usually when they are well-known in the field or when the respective term is used a considerable amount of times in the document.
- *Executive Summary:* An executive summary is a report, proposal, or portfolio, etc. in miniature (usually one to two pages). That is, the executive summary contains enough information for the readers to become acquainted with the full document without reading it. Usually, it contains a statement of the problem, some background information, a description of any alternatives, and the major conclusions. Someone reading an executive summary should get a good idea of main points of the document without becoming bogged down with details.

An executive summary differs from an abstract in that the former's purpose is to inform the reader of the points to be covered in the report without any attempt to tell what is said about them. Covering no more than one to two pages in length, the executive summary is longer and is a highly condensed version of the most important information the full document contains. Both the executive summary and the abstract are independent elements rather than a part of the body of the document.

With the possible exception of the conclusion and the recommendations, the executive summary is the most important part of a report. As such, it should be the best-written and most polished piece of the document and it should make sure that the main point of the document gets across to readers. This is because many readers may only look at the executive summary when deciding whether or not to read the entire document. In short, it may be expected that an executive summary will be read more frequently and by more people than the entire document.

Since the executive summary is a condensation, when creating it, any preliminaries, details, and illustrative examples must be omitted. In this respect, the main ideas should be included as well as the facts, the necessary background to understand the problem, the alternatives, and the major conclusions. Brevity and conciseness are the keys to a well-written summary.

Therefore, the structure of a comprehensive executive summary should address and incorporate the following points:

- First, the *project objective* should be mentioned as well as the *WP name and targets*. Then the *objective* and the *scope* of the document are described. In a concise,

comprehensive and straightforward way, it is explained what this document aims to do and how this is going to be done. For example “*In this report we identify future research priorities for researchers in the field of X. We do this by first setting the context by providing the trajectory of X from its early days to current practice. We then consider this current situation...*”

- Second, the *methodology* and/or the *rationale* of the document are presented in order to provide an overview of how the research results were obtained. For example, “*The research priorities were identified through analysing the literature – both workshop reports and scientific published papers by...*”
- Third, the main *results/outcomes* of the document are described. For example, “*This coding resulted in six main areas of barriers and challenges which are listed below: Complexity of research field addresses problems...*”
- Finally, if it is highly necessary that the main conclusions are provided.
- **Introduction:** It is the beginning section which states the purpose and goals of the document. This is generally followed by the main body and conclusions. The introduction will always include three subsections:
 - **Scope:** defines the purpose and goals of the specific deliverable and connects it to the overall work package and project goals.
 - **Audience:** indicates the audience that would be interested in the results reported in this deliverable.
 - **Structure:** presents the structure of the document, namely the content that will be presented in each of the subsequent sections.
- **Main body:** the main body, as the name suggests, is the most important part of the document. The subject of the document is explored and valid reasons and justifications are given. There is no restriction as regards the number and length of main body sections, with the following exceptions:
 - The first section of the main body is usually the *Methodology* section.
 - The last section of the main body is always the *Conclusion* section.
- **References:** a reference is a previously published written work which has been used as a source for theory or claims referred to which are used in the document. References contain complete bibliographic information so the interested reader can find them in a library. References are added at the end of each document, at the relevant section. All references should follow the APA style of referencing³.
- **Annexes:** These sections may contain collection of supplementary material. All annexes should be numbered using the capital letters of the alphabet.

³ <http://www.usq.edu.au/library/referencing/apa-referencing-guide>

In order to ensure homogeneity and quality of every document produced by the PBL3.0 consortium, apart from the aforementioned sections of the templates, attention shall be paid to the following:

- Headers and footers of each document will be formatted according to template guidelines
- Fonts, paragraphs, bullets, numbered lists etc. will be formatted with the use the predetermined styles. Calibri, size 11, will be the “Normal” font style used throughout.
- Captions to all tables and figures will be used. Figure captions should be placed below each figure, whereas table captions should be placed above each table.
- Automatic cross-referencing for tables and figures in the main body will be used to ensure readability
- Referencing should follow the APA referencing method. References in main body should be in the form of (Name, Year) not in the form of subsequent numbering such as [1], [2], etc.

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Figure 1. Indicative table of contents for PBL3.0 deliverables

2.2.2 Internal document template

Internal documents will follow the deliverable template eliminating not needed parts, such as deliverable title. An internal document template will also be provided by the Project Coordinator.

2.2.3 Presentation template

A presentation template in MS PowerPoint will be created for the project and will be used by partners for any project-related presentation either within the consortium activities (e.g. project meetings, reviews) or for external dissemination (e.g. conference presentations). The responsible organisation for the preparation of the presentation template is UOM as Project Coordinator.

2.3 Document naming

File names of documents will follow a specific format to ensure correct communication of the documents without losing track of their circulation. This becomes particularly important for documents that require consecutive contributions from partners and that may circulate frequently and successively within the consortium. PBL3.0 documents will be named as follows:

INTR_Dxy_ContentDescription_VER

where:

- INTR = Internal reference (PBL3.0, WPx)
- Dxy = deliverable number (used only in the case of deliverables)
- ContentDescription = A very short description of the file's content
- VER = Version number (v01, v02, v03, ...). Version numbers will be assigned as follows:
 - Version integers are kept for document submission to the EC. The first submission of a document to the EC will be marked as v1. If a second submission is needed, this will be v2 etc. Versions before the first submission to the EC should be marked as v0.
 - Version decimals (in other words, releases) will be used for communication between partners. The first draft version to be communicated within the consortium will be vX.1, the second vX.2 etc.

Electronic file names of PBL3.0 documents should follow the same naming convention.

2.4 Document exchange

A draft document will naturally go through a series of iterations before becoming the final document. Each document will have one designated person in charge of its development and completion. The development will be initiated by the person in charge by posting the first draft through email or on the project web site. The person in charge should notify the consortium that the draft document is ready and ask for comments and updates. Participants should respond indicating their comments and suggestions for modifications. Then, the draft document is updated by the person in charge based on the comments and suggestions from the participants and the revised version is put on the Web page or circulated through email. When no more changes are proposed by the participants for about a reasonable amount of time, the document freezes; an e-mail notice regarding the final date of receipt of comments is circulated before the document is frozen.

If a need arises in the future to update a document, the new document(s) are prepared using the same procedure, and the resultant documents are indicated by including version numbers in their titles.

Note that large attachments to e-mails should be zipped, and that where possible, no attachment should be larger than approximately 2MB.

3 Communication over the Internet

E-mail is the standard communication means for communication among the consortium members.

All e-mails related to the PBL3.0 project must have a Subject that starts with:

Subject: PBL3.0: <rest of subject>

This will allow partners to clearly distinguish between e-mails related to the project and all other e-mails. It will also enable the use of filters for the automatic classification of e-mails.

An example of a subject: *PBL3.0: Minutes of WP8 Kick off meeting*

Apart from emails, a Google Drive workspace will also be created to accommodate the needs of the project. Google Drive will be maintained by UOM and will be prepared according to an appropriate directory structure.

To facilitate e-mail communications, the following e-mail exploder will be created and maintained by UOM: pbl3-project@googlegroups.com. All communication in the consortium should be sent to this email address.

4 Project web site

The project coordinator has registered for the next 3 years the following domain name:

www.pbl3-project.eu

This domain will host the Web site of the PBL3.0 project.

UOM will design the layout and AAU along with UOM will maintain its content. The Web site will include content related to the PBL3.0 project and to other issues and news addressed within PBL3.0.

Internal project documentation will be maintained in Google Drive, therefore no need for a private Web site area is foreseen at this stage. If the need arises later, the Coordinator will provide such a facility.

4.1 Features and maintenance

Given that the web site of the project is an important tool for its dissemination, PBL3.0 will take all necessary actions to ensure high quality, increased reach-out and successful dissemination of the project. A list of actions is provided below:

- **Continuous content update:** Content updates represent an important aspect for both attracting visitors to the site and also enhancing the reach-out of the results of the project. The updates will be based on synergies among all partners to ensure that the content update will constitute a coordinated activity.
- **Publication of project results and dissemination material:** Project results, mostly public project deliverables, will be available to web site visitors. Publication of dissemination material is another important activity to be fulfilled at the source, i.e. by individual partners.
- **News and events updates:** In order to secure that all relevant news and events are updated on a regular basis, a proactive approach will be pursued. Therefore, all partners will actively report and provide information relevant to the project objectives. The details to be provided by the partners should include the URL link to the news item or event, the title of the event/news item and any additional information deemed necessary to be uploaded. The participatory nature of the proposed approach will allow for immediate and timely updating of the website.
- **Use of RSS feeds among users:** RSS feeds can provide automated means for updating users of new content. All RSS enabled pages on the PBL3.0 web site will display a little RSS icon to capture the users' attention and inform them on the availability of feeds. This feature can be referred to and highlighted on the website and in the PBL3.0 dissemination materials in order to increase website traffic and increase the number of users subscribing to feeds.
- **Promotion of website to boost visitor numbers:** As the web site is an essential tool of externalising the project results, sufficient focus should be given on its promotion. In that sense, the Dissemination Strategy shall be combined with promotion activities to maximise results.

5 Software versions and maintenance

Software will be managed online in a relevant web-based hosting service for software development, such as GitHub. Initially, software will be maintained in private repositories accessed only by project partners. However, when software reaches a certain level of maturity, the consortium may decide to release certain parts of it as open source.

Each partner providing to the project internally developed software, should number subsequent releases according to a clearly recognizable scheme.

Each partner is responsible for maintaining backup copies of the developed software package(s) provided to the project. On request by specific partners or WP leaders, a partner providing software package(s) should be able to provide a new copy of the package ready for installation, and to give installation instructions along with all the required assistance. This can include on-site presence as needed.

6 Meetings

The meeting organizer(s) will inform the Project Coordinator about the meeting details (date, place, venue, etc.). The Project Coordinator will publish this information. The person who has the authority to call a meeting should initiate the procedure, and must comply with the restrictions imposed upon by the governing documents.

The meeting organizer(s) are responsible to deliver the participant list, meeting agenda, and presentations and any other documents given in the meeting.

It is expected that most meetings will be plenary meetings. Work package meetings may also be organised, if needed. More information on these meetings' organisation and the minutes to be recorded is provided below.

6.1 Plenary Meetings

Plenary meetings will direct the project, and act as a forum for decision making. Plenary meetings are to be set by the Project Coordinator in agreement with the Partners.

Chairman:	Project Coordinator or his deputy
Attendees:	Designated (or deputy) representatives of the partners plus other employees of the partners if required
Agenda:	The agenda shall be proposed by the chairman and circulated in advance
Purpose:	Agree on strategic guidelines for the Project and steer the project according to agreed objectives
Issue of minutes:	The minutes shall be issued by the Project Coordinator. WP leaders shall keep minutes related to their WPs which shall be sent to the Project Coordinator within three (3) working days after the completion of the meeting itself. The Project Coordinator will then communicate the minutes to Partners for comments. The last page of the minutes includes Action Points, responsible organisation and deadlines.
Circulation of minutes:	Consortium members, Attendees
Approval of minutes:	The minutes shall be considered as accepted, if within fifteen (15) calendar days from receipt, no Partner has objected in a traceable form to the Project Coordinator.

6.2 Work Package Meetings

Work Package specific meetings can be required in order to address WP specific issues or review WP deliverables. Such meetings can be arranged by WP leaders in consultation with the Project Coordinator.

Chairman:	Specific Work Package Leader
Attendees:	Representatives of each partner as appropriate
Purpose:	To discuss, agree on and/or resolve technical matters. Work Package Managers should report on Actions arising to the Project Coordinator.
Frequency:	As required in agreement with the Project Coordinator
Issue of minutes:	Minutes shall be issued by the WP Leader. The last page of the minutes includes Action Points, responsible organisation and deadlines. The minutes shall be circulated within three (3) working days by the WP leader to Partners for comments
Circulation of minutes:	Attendees, Project Coordinator
Approval of minutes:	The minutes shall be considered as accepted, if within fifteen (15) calendar days from receipt, no Partner has objected in a traceable form to the Project Coordinator.

6.3 Meeting minutes

The minutes of each meeting shall follow a specific structure which is broken down in the following categories:

- Actions pending from previous meetings
- Work Packages or Topics discussed, including:
 - A description of the main points raised as well as of the decisions taken
 - A description of the actions that will be performed with their respective deadlines
- Summary of actions: this section includes a summary of previous actions performed as well as of the new ones that will be performed.

The template document for meeting minutes shall be produced and disseminated to the consortium by the Project Coordinator.

Work Package leaders are expected to keep track of actions within their respective WPs and to ensure that these actions fully comply with the decisions taken and the deadlines set.

7 Conclusion

The purpose of this deliverable has been to define the common procedures which are to be used in the project as well as to further specify the organisation of the consortium partners within the project. In this context, this deliverable determined the following management aspects and guidelines:

- Documents in the PBL3.0 project should be created following a specific, predetermined format and structure, named according to a specific naming convention and exchanged through email or through the project web site.
- Distant communication of partners will be achieved through email and through an email exploder set up specifically for the PBL3.0 consortium.
- A project web site will be prepared to be used for reaching out to the wide public.
- Software developed in the project will follow a specific versioning system and should be maintained by the partner responsible for its development.
- Meetings' organisation and minutes' recording will be performed according to specific processes and within predetermined timeframes.

Overall, this document will be used as a signpost for the effective day-to-day execution and implementation of the project. Partners are committed to their compliance with the project management methods described herein.