# - An FP7/Horizon2020 Tool -

# Quick Start
# Handling Documents, Task Data and Reports

Issue: September 2014

# Table of Contents

# 1 Introduction

This Quick Start for :milliarium has been conceived to explain you how you can

- Exchange documents for projects
- View a deliverable/milestone/task
- Add a deliverable/milestone/task
- Change the status of a deliverable/milestone/task
- View the history of a deliverable/milestone/task and
- Print lists and reports.

Please refer to the user manual in order to learn more about other functions.

Enjoy your work with :milliarium!

# 2 Documents

The Documents function in :milliarium is used to exchange vital documents, such as reports, minutes of meetings or Power Point slides, for projects. Documents are filed per project. An Explorer type of view is used to create new folders, delete and rename folders, upload files - up to 20 MB - as well as delete and rename files.

**To open the Explorer-like view**

1. On the top menu bar, click **Project**.

   By default, :milliarium displays your deliverables and milestones in the navigation area.

2. To display all projects, click **Toggle: Full Project Tree**. The navigation area now provides an overview of all projects.

3. Click on ⊞ next to the relevant project to open the list of the project.

4. Click on **Documents**.
   The Explorer-like tree view opens.

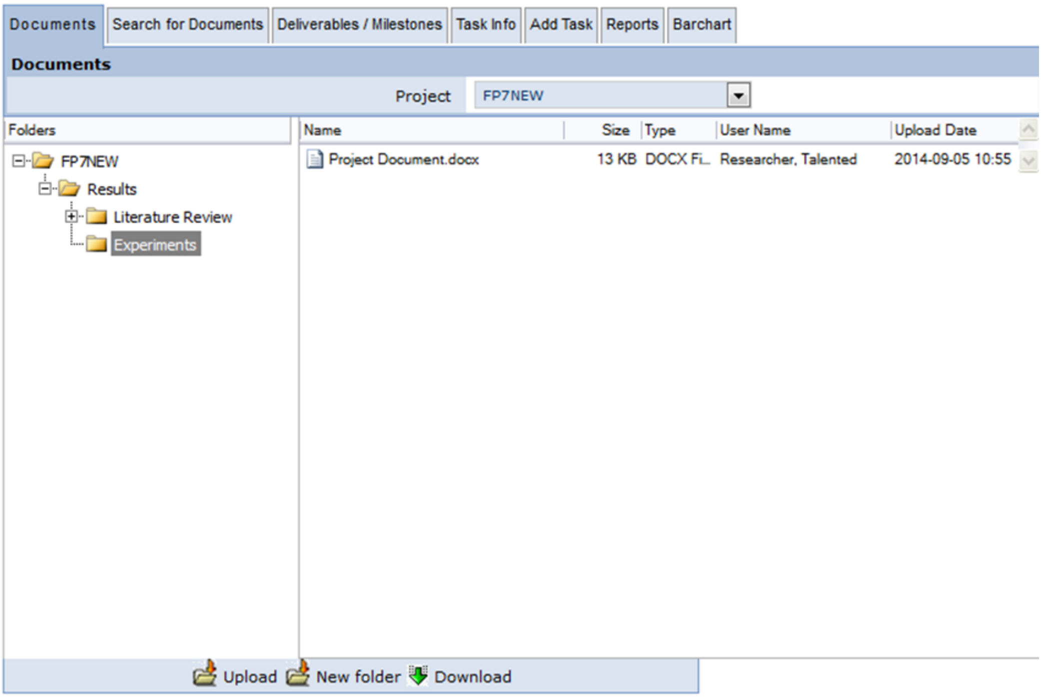



**Fig. 1: Explorer-like tree view for documents**

**To create a new folder**

1. In the Explorer-like tree view click **New Folder**.
   The "Explorer User Prompt" dialog box opens.
2. Enter a name for the new folder.
3. Click **Ok**.
   The new folder is displayed in the tree view.

**To upload files**

1. Click **Upload**.
   The 'File Upload' window is opened.
2. Click Browse... to select the desired file.
3. In the 'File Upload' window click Upload.
4. During the upload time the progress is indicated in the 'File Upload' window. The 'File Upload' window is closed.
   The uploaded file is shown in :milliarium

**To open a folder**

1. Click on the folder.
   Subfolders and files are displayed on the right hand side.

**To rename a folder / file**

1. Right-click on the folder / file.
2. Select **Rename** from the drop-down menu.
   The "Explorer User Prompt" dialog box opens.
3. Enter the new name for the folder / file.
4. Click **Ok**.
   The new name is displayed.

**To delete a folder / file**

1. Right-click on the folder / file.
2. Select Delete from the drop-down menu.
3. Click **Ok**.
   The folder / file is deleted.

# 3 Deliverables, Milestones and other Tasks

:milliarium can be used to manage your Deliverables and Milestones as defined in the Description of Work (= contractual tasks) as well as all other project-related tasks. In the following sections, the word ‘task’ is meant to refer to both contractual and other tasks.

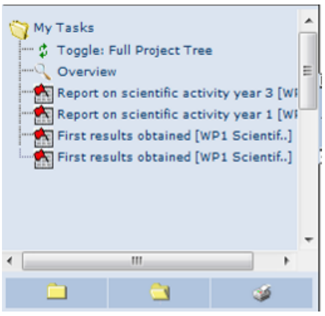
## 3.1 Viewing the List of Your Own Tasks

The following steps describe how to display a list of all your tasks broken down by workpackages.

**To view your own tasks:**

1. On the top menu bar, click  **Project**.

   By default, :milliarium loads your tasks into the navigation area.




2. Click the 'Overview' icon in the navigation area to receive an overview of your own tasks in the form of a list.

   The working area lists your tasks broken down by projects and workpackages on the 'Deliverables/Milestones' tab.

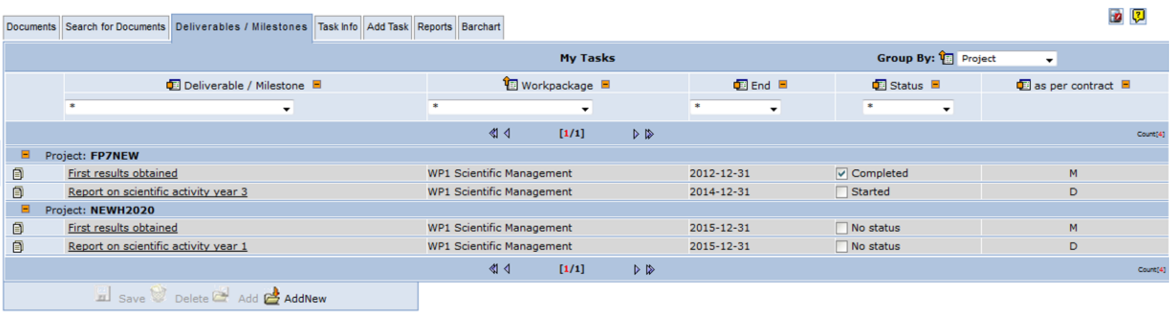



**Fig. 2: Overview of your own tasks broken down by projects**

You can sort, group the data and set various filters on the displayed tasks using the list boxes on the top of the tab.

## 3.2 Adding a New Task

Adding a new task is a two-step process:

(a) assigning the new task to the required project and the required workpackage
(b) entering data describing the task.

**(a) To assign a new task to a project and a workpackage**

1. Access the list of your tasks.

2. At the bottom of the working area, click **AddNew**.

   The working area displays the 'Add Task' tab. All available projects and workpackages are listed in the list boxes.

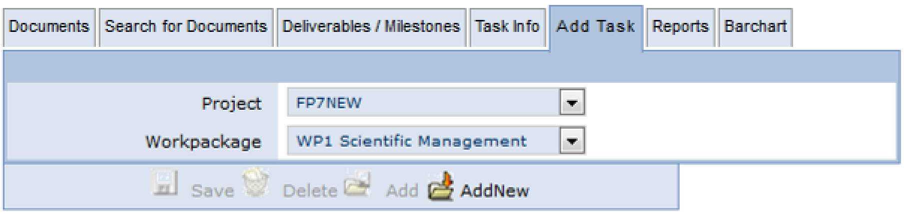



**Fig. 3: 'Add Task' tab**

3. From the 'Project' list box, select the required entry.

4. From the 'Workpackage' list box, select the required entry.

*Note* The selected 'Workpackage' list box entry affects the selectable persons as 'Responsible' in other program parts. In :milliarium, you can only select persons who are actually workpackage members.

5. Click **AddNew** again to complete the assignment of the task to the selected project and workpackage.

   The working area is reloaded, showing the empty 'Deliverable/Milestone' tab. You are now ready to enter your task data.

**(b) To record important data about the new task**

1. On the 'Deliverable/Milestone' tab, make your entries and settings according to your needs.

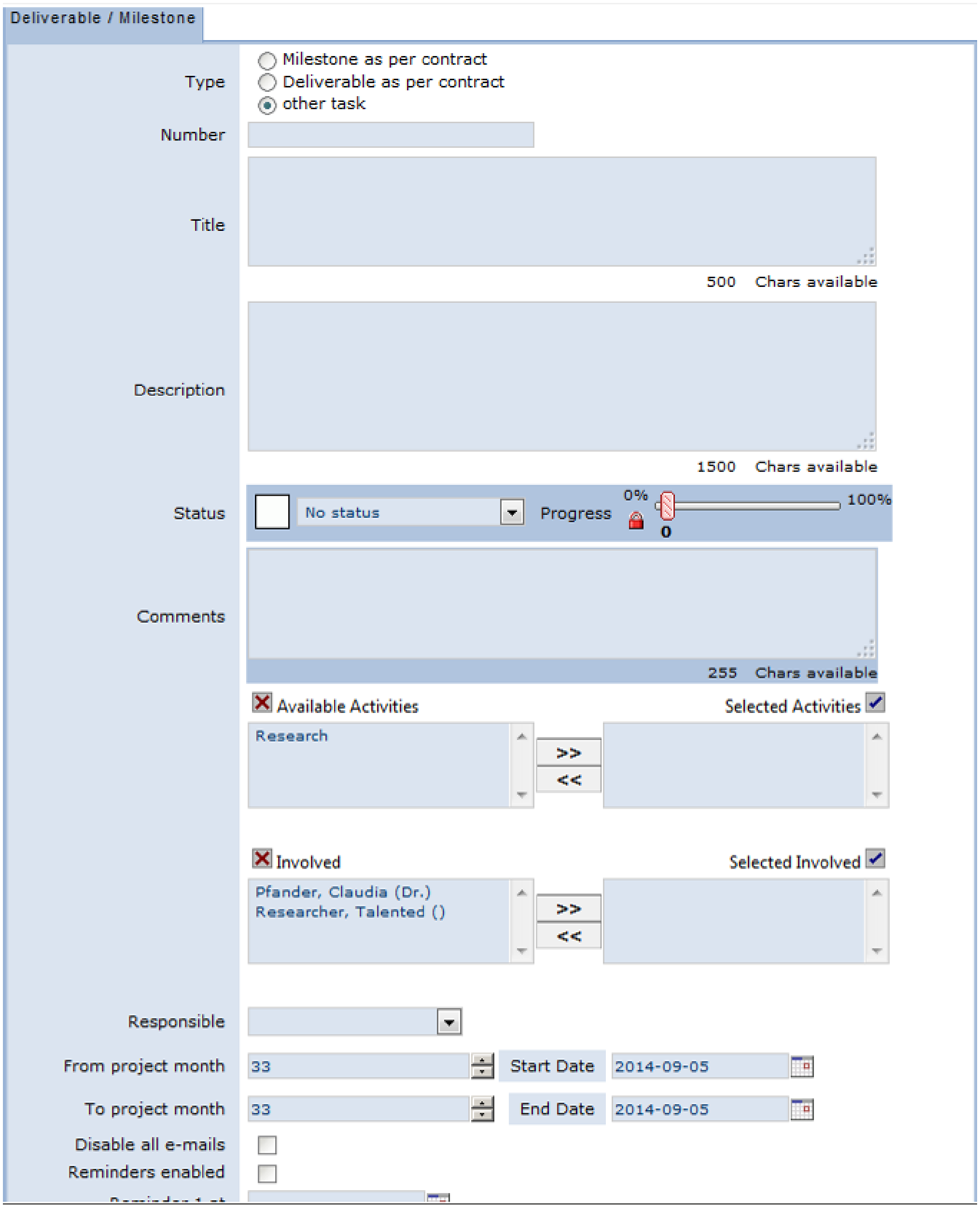



**Fig. 4: 'Deliverable/Milestone' tab, default view**

- 'Type' option buttons
  To classify the new task as defined in the technical annex.
  Available are: Milestone as per contract / Deliverable as per contract and other task.
- 'Number' text box
  The ID to identify the deliverable/milestone as defined in the technical annex. Enter numbers, letters or other characters. Non-contractual tasks can be numbered freely.

- 'Title' text box
  Task name to be used in :milliarium reports and lists.
- 'Description ' text box
  Task short description.

*Note* The description is also used in the reminder email.

The recipient should easily recognize any action to be done. Therefore, it is recommended to use the task's main parts as an entry. In other cases, earlier documents and correspondence can be referred to. To denote a contact person is often useful.

- 'Status' list box, 'Progress' slide bar
  To change the task's current state. Available entries are: No status, Completed, Delayed, Started and Cancelled.
  You can select a percentage by moving the slider on the 'Progress' slide bar.
- 'Comments' text box
  Descriptive text to the task's state and progress. For further information.
- 'Available Activities' / 'Selected Activities' list boxes
  To select the task's activity group. Selected entries can be moved to the right text box using the >> button and << button.

*Note* Activity groups are required for FP7 projects to assign the correct funding rate.

- 'Involved' / 'Selected Involved' list boxes
  To select all responsible persons for a task. Selected entries can be moved using the >> button and << button.
  The selected entries are used in the 'Responsible' list box.
- 'Responsible' list box
  To select the task's person in charge.
  List box entries are all responsible persons previously selected in 'Selected Involved'.
- 'Start Date' / Calendar
  To determine when the task begins.

You can enter the date in format yyyy-(m)m-dd or select it from the calendar using the button.

- 'End Date' / Calendar
  To determine when the task is terminated.
  You can enter the date in format yyyy-(m)m-dd or select it from the calendar using the button.

*Note* Defining 'Start Date' and 'End Date' of a task, you have to obtain that the tasks have to be within the defined project duration and that the 'End Date' has to be later than the 'Start Date'.

*Note* :milliarium sends a reminding email to all selected involved persons at the task's end date.

- 'Reminders enabled' / check box
  To enable the defined reminders, click the 'Reminders enabled' check box.
- 'Reminder 1 at' text box
  Reminding email to be sent previous to the reminder 2 email and to the end date email.
  You can enter the date in format yyyy-(m)m-dd or select it from the calendar using the button.

*Note* Reminder 1 date has to be later than the defined 'Start' date. It can be later than the project end date, for example to manage tasks related to the final reporting.

- 'Reminder 2 at' text box
  Reminding email to be sent after the reminder 1 email and previous to the end date email.
  You can enter the date in format yyyy-(m)m-dd or select it from the calendar using the button. The date has to be earlier than the end date of course.

*Note* Reminder 2 date has to be later than the defined Reminder 1 date.

2. Click **Add**.

   The task is added and displayed in the list in the navigation area.

## 3.3 Changing the Status of a Task

You can change the status of a task on the 'Deliverables/Milestones' tab.

1. Navigate to the task with the status to be changed.
2. From the 'Status' list box, select the required entry.

   Available entries are:

   No Status (slider on the 'Progress' slide bar is locked to prevent editing, percentage is 0%)

   Completed (slider on the 'Progress' slide bar is locked to prevent editing, percentage is 100 %)

   Delayed (slider on the 'Progress' slide bar is available to move and can be locked manually)

   Started (slider on the 'Progress' slide bar is available to move and can be locked manually

   Cancelled (slider on the 'Progress' slide bar is available to move and can be locked manually)

<u>**To define the progress of task state as percentage of task**</u>

3. If available, move the slider on the 'Progress' slide bar.

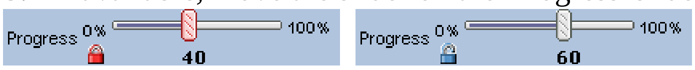



**Fig. 5: 'Progress' slide bar, defining the progress of task status**

1. If necessary, lock/unlock the slider of the 'Progress' slide bar by clicking the 'Padlock' icon:

   Progress slider is locked to edit.

   Progress slider is available (unlocked) to edit.

   The color of the slider and of the 'Padlock' icon change either to red or blue.

5. In the 'Comment' text field, enter a text reflecting the task’s present situation.
6. Click **Save**.

## 3.4 Viewing the History of the Task's Status

You can monitor the development of a task on the 'History' tab. The progress of a task status and all comments are listed chronologically in order to monitor the task's development at any time.

**<u>To view the history of the task's status</u>**

1. Access the list of your tasks.
2. In the list of tasks, click the 'Edit' icon next to the requested task.
3. In the working area, click the 'History' tab.

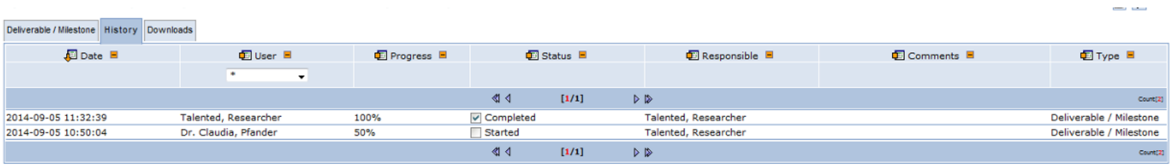



**Fig. 6: 'History' tab (example)**

# 4 Reports

You can generate reports of :milliarium workpackages and milestones.

You can set filters to tailor the required reports to your needs, e.g. define project, time ranges and sorting. Once you have generated the report, you can export the result as pdf or Excel file.

## 4.1 Defining Filter Criteria for Reports

Report filters allow you to specify which data you want to include in or exclude from the report you are about to create.

In the following steps, we assume that you have already opened a project and that you have selected the Workpackages folder or the Deliverables/Milestones folder in the navigation area.

**To set report filters**

1. In the working area, click the 'Reports' tab.

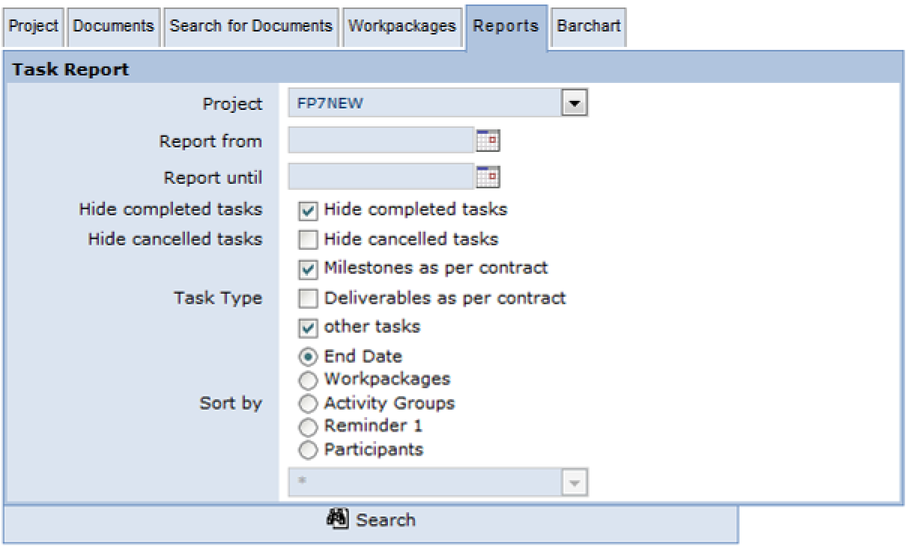



**Fig. 7: 'Reports' tab (example for milestones)**

2. From the 'Project' list box select the required entry (entries include the projects you are involved in).

3. In the 'Report from' and 'Report until' text boxes, enter the required date
   - OR –
   use the 'Calendar' button .

4. To exclude milestones with the status **Completed**, select the 'Hide completed tasks' check box.

5. Tick the applicable option of the ‘Task Type’ check box. Available are: ‘Milestones as per contract’, ‘Deliverables as per contract’ and ‘other tasks’.
   To search only reports characterised as an integral part of the contract or technical annex, select the ‘Milestones as per contract’ or ‘Deliverables as per contract’ check box.

6. In the 'Sort by' group, select the required check box; for example, select Sort by: **End date**.

Once you have set the report filters you require, you are ready to generate and export the report.

## 4.2 Generating and Exporting the Report

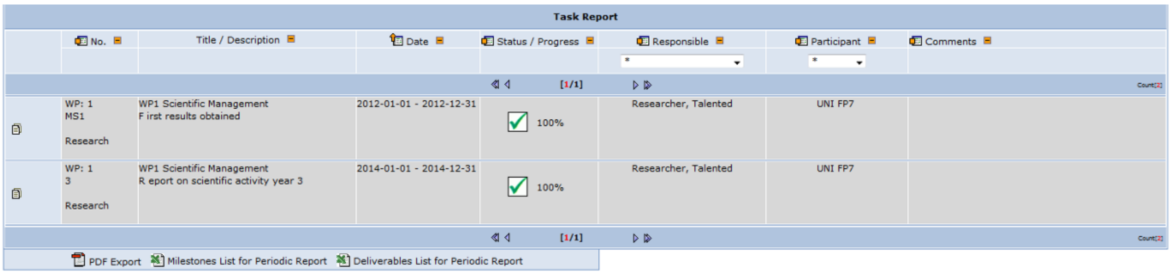
In the following steps, we assume that you have already defined your filter criteria for the report you are about to generate.

**<u>To generate and export the report</u>**

1. On the 'Reports' tab, click **Search** to generate the report.

Upon completion of the report generation process, the 'Task Report' will be displayed below the **Search** button.

Additionally, you can filter the 'Task Report' by the person who is responsible for a task. The rows not matching the filter criterion will be temporarily hidden.


Task Report

| | No. | Title / Description | Date | Status / Progress | Responsible | Participant | Comments |
|---|---|---|---|---|---|---|---|
| | | | | | * | * | |
| | | | | [1/1] | | | |
| | WP: 1<br>MS1<br>Research | WP1 Scientific Management<br>F irst results obtained | 2012-01-01 - 2012-12-31 | 100% | Researcher, Talented | UNI FP7 | |
| | WP: 1<br>3<br>Research | WP1 Scientific Management<br>R eport on scientific activity year 3 | 2014-01-01 - 2014-12-31 | 100% | Researcher, Talented | UNI FP7 | |
| | | | | [1/1] | | | |

PDF Export Milestones List for Periodic Report Deliverables List for Periodic Report

**Fig. 8: Task Report**

Finally, you can export the displayed 'Task Report' as pdf file or to Excel:

2. Click one of the following buttons:

### PDF Export

The Adobe Reader® opens displaying the 'Task Report' ordered by the selected search criterion.

:milliarium

**Milestone Report**

Project: New FP7 Project

Report period -

| No. | ActivityGroups | Title / Description | Date | Status | Leader | Participant | Comments |
|---|---|---|---|---|---|---|---|
| WP:1 MS1 | Research | WP1 Scientific Management First results obtained | 2012-01-01 - 2012-12-31 | 100% ✓ | Researcher, Talented | UNI FP7 | |
| WP:1 3 | Research | WP1 Scientific Management Report on scientific activity year 3 | 2014-01-01 - 2014-12-31 | 100% ✓ | Researcher, Talented | UNI FP7 | |

**Fig. 9: 'Milestone Report' as pdf file (example)**

The 'Milestone Report' contains the project name, project period, search criterion, number, title and description, date, status, leader, participant and comments.

### Milestones List for Activity Report

MS Excel opens displaying the 'Milestone List' ordered by the selected search criterion as described in ‘Guidance notes for Project reporting’ for FP7 (issued 2012 by the EU Commission)’.

**Fig. 10: 'Milestone List' as Excel file (example)**

The 'Milestone List' contains the milestone number, milestone name, workpackage number, lead beneficiary, delivery date, whether the milestone has been achieved, actual/forecast delivery date and a comments field.

### Deliverables List for Activity Report

MS Excel opens displaying the 'Deliverables List' ordered by the selected search criterion as described in ‘Guidance notes for Project reporting’ for FP7 (issued 2012 by the EU Commission)’.

**Deliverables List**

***Please fill in the required information (highlighted in yellow = current reporting period)***
*Please note:*
*- If a Deliverable is postponed, please indicate this in the column "Comments" and specify the "Forecast delivery date"*
*- If a Deliverable has been cancelled or regrouped with another one, please indicate this in the column "Comments".*
*- If you are proposing a new Deliverable, please add it in a new line and indicate this in the column "Comments".*

**TABLE 1. DELIVERABLES**

| Del. no. | Deliverable name | Version | WP no. | Lead beneficiary | Nature 1) | Dissemination Level 2) | Delivery date from Annex I | Actual/ Forecast delivery date | Status Not submitted/ Submitted | Contractual Yes/No | Comments |
|---|---|---|---|---|---|---|---|---|---|---|---|
| 1 | Report on scientific activity year 1 | | 1 | 4 | | | 31/12/2012 | 31/12/2012 | Submitted | Yes | |
| 2 | Report on scientific activity year 2 | | 1 | 5 | | | 31/12/2013 | 31/10/2013 | Submitted | Yes | |
| 3 | Report on scientific activity year 3 | | 1 | 6 | | | 31/12/2014 | 31/12/2014 | Not submitted | Yes | |

**Footnotes:**

1) Please indicate the nature of the deliverable using one of the following codes:
R = Report, P = Prototype, D = Demonstrator, O = Other

2) Please indicate the dissemination level using one of the following codes:
PU = Public
PP = Restricted to other programme participants (including the Commission Services).
RE = Restricted to a group specified by the consortium (including the Commission Services).
CO = Confidential, only for members of the consortium (including the Commission Services).

**Fig. 11: 'Deliverables List' as Excel file (example)**

The 'Deliverables List' contains the deliverables number, deliverable name, version, workpackage number, lead beneficiary, nature of deliverable, dissemination level, delivery date, actual/forecast delivery date, status of submission, whether the deliverable is contractual and a comments field. Footnotes explain the various entries in more detail.

# Index