



PLONE Manual



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1. Introduction

PLONE is an on-line environment designed and created for the needs of the RURAL WINGS project. It is a web-based tool, in which all the reports of the project have been incorporated in such a way, so as to be easily accessible, comprehensible and manageable from the partners. Additionally, it also operates as a communication space, offering special sections for uploading and downloading internal and external project documents, calendar of related to the project events, action lists and deadlines for specific activities.

The scope of the creation of PLONE is to achieve an effective and consistent project administrative management through it, avoiding misunderstandings, delivery delays, effort and time consuming procedures that could be problematic for the smooth evolution of the project. The scope of the tool can be focused on its three main characteristics:

- Easy reporting system
- Common server for exchanging documents and files
- Useful tool for efficient project management

Below, the basic sections and functionalities of PLONE are described and analysed, in order for the present document to be used as the tool manual for the project partners.

2. Access Levels and Rights

There are four access categories in PLONE for the project partners, and one for the EC project officer:

- Partner Administrator
- Reporter
- Viewer
- Member
- Reviewer

Each of the abovementioned categories has different level of accessibility and rights in PLONE, according to their role in the project, as well as their internal role in each partner's organization. The roles and rights of each of the categories are given below analytically.



2.1 Partner Administrator

Main Responsibility: To handle the rights of PLONE users that belong to her/his partner organization.

She/he has access to all sections of the tool and all rights regarding effort and progress reporting, adding or modifying PLONE members (from her/his partner organization), uploading and downloading shared documents, viewing the F.A.Q.s and the calendar of events. Specifically, she/he is privileged to:

- create new effort and progress reports
- view effort and progress report lists (aggregated and analytical)
- view effort report overview
- add a new PLONE user from her/his partner organization
- modify an existing PLONE user from her/his partner organization (privileges, e-mail address, password) or even remove her/him
- upload, download and view shared documents
- view F.A.Q.s
- upload, download and view events

Additionally, if the partner organization that the partner administrator belongs to is also a WP leader, then she/he can also view all the progress reports in the specific WP that the participating partners have finalized, in order to compose the overall report for the WP.

2.2 Reporter

Main Responsibility: To create the Effort and Progress reports.

Each partner has up to two (2) reporters. Each Reporter has access to all sections of the tool and all rights regarding effort and progress reporting. She/he cannot add new PLONE members, while she/he can modify only PLONE members that have lower accessibility than her/him (viewers, members from her/his partner organization). She/he can upload and download shared documents, view the F.A.Q.s and the calendar of events. Specifically, she/he is privileged to:

- create new effort and progress reports
- view effort and progress report lists (aggregated and analytical)



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- view effort report overview
- modify the privileges of an existing PLONE viewer or member from her/his partner organization
- upload, download and view shared documents
- view F.A.Q.s
- upload, download and view events

Additionally, if the partner organization that the reporter belongs to is also a WP leader, then she/he can also view all the progress reports in the specific WP that the participating partners have finalized, in order to compose the overall report for the WP.

2.3 Viewer - Reviewer

She/he has restricted access to the sections of the tool regarding effort and progress reporting. She/he cannot create a new effort or progress report, but she/he has access to view all effort and progress report lists and overviews. She/he cannot add new PLONE members, nor can modify existing PLONE members. She/he can upload and download shared documents, view the F.A.Q.s and the calendar of events.

The same access level, with a small differentiation, with the viewer has the reviewer. This category of PLONE user is created for the project officer, so as she/he can have access to all the needed sections of PLONE in order to continuously monitor the progress of the project. The difference with the viewer is that the reviewer can see the effort report lists and overview from all partners, while the viewer can only see her/his organization's.

Specifically, the viewer and the reviewer are privileged to:

- view effort report lists (only aggregated) and overview (of all partners for the reviewer, only her/his organization for the viewer)
- view progress report lists
- upload, download and view shared documents
- view F.A.Q.s
- upload, download and view events



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2.4 Member

She/he is in the lower level of accessibility, as she/he can only upload and download shared documents, view the F.A.Q.s and the calendar of events. She/he doesn't have any access or rights to the sections of PLONE related to reporting, and she/he cannot add new PLONE members, nor can modify existing PLONE members. Specifically, she/he is privileged to:

- upload, download and view shared documents
- view F.A.Q.s
- upload, download and view events

The privileges of each category of the PLONE users can be shown altogether in the table below:

	Partner Administrator	Reporter	Viewer Reviewer	Member
Add or remove a PLONE user from her/his partner organization	✓			
Modify information about an existing PLONE user from her/his partner organization (e-mail address, password)	✓			
Modify the privileges of an existing PLONE user with lower level of accessibility from her/his partner organization	✓	✓		
Create new effort and progress reports	✓	✓		
View effort and progress report lists (analytical)	✓	✓		
View effort and progress report lists (aggregated)	✓	✓	✓	
View effort report overview	✓	✓	✓	
Upload, download and view shared documents	✓	✓	✓	✓
View F.A.Q.s	✓	✓	✓	✓
Upload, download and view events	✓	✓	✓	✓



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3. Login

The introductory page of the PLONE environment (see Fig.1) contains the log in space and a calendar, marking the present day. In the log in space the user gives his username and password which enter her/him in the tool, where she/he can access the respective fields according to her/his access level.

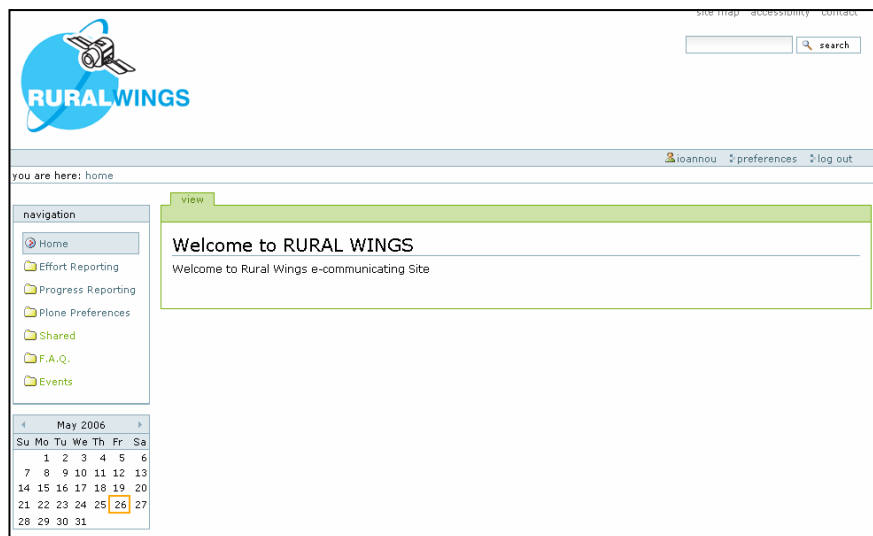


Figure 1: The introductory page of the PLONE environment

4. First Page - Contents

The first page of the PLONE environment for the logged-in user is given in Fig.2. It contains a navigation guide (contents) to the tool and the calendar, which is present in all sections of PLONE. Once a PLONE user is logged-on, she/he can change her/his password by clicking on "preferences" next to her/his username on the up-right section of the page (see Fig.2).

The contents of the PLONE environment differ according to the access rights of each user.

The **partner administrator** can access the following sections:

- Effort Reporting
 - New Report
 - Report List
 - Overview



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- Progress Reporting
 - New Report
 - Report List
- Preferences
 - Add Portal Member
 - Modify Portal Members
- Shared
- F.A.Q.
- Events

The **reporter** can access the above sections, except from the "Add Portal Member" section.

The **viewer** and the **reviewer** can access the sections the reporter can, except from the "Preferences", the "Effort Reporting: New Report" and the "Progress Reporting: New Report" sections.

Finally, the **member** can only access the "Shared", "F.A.Q." and "Events" sections.

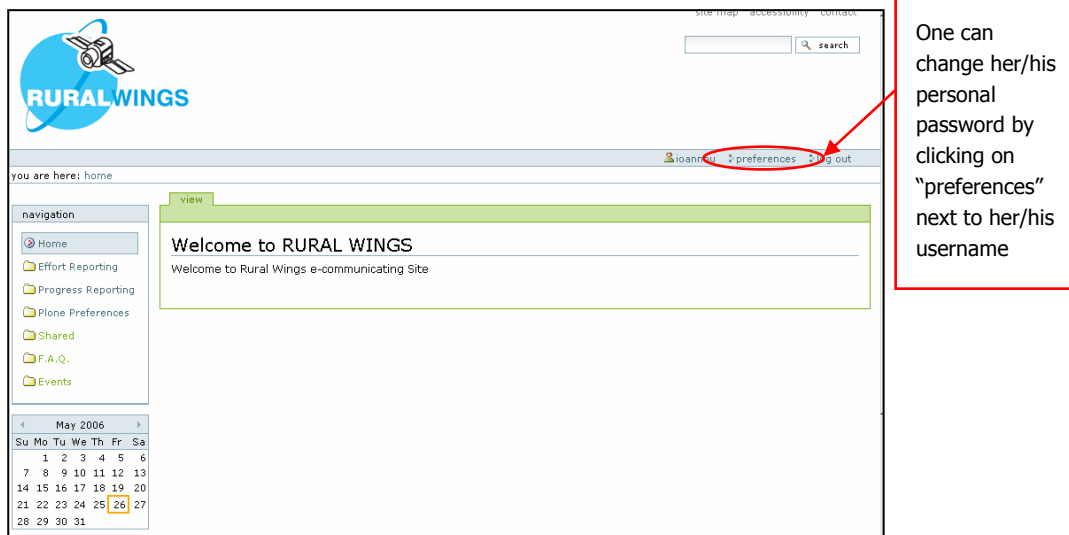


Figure 2: The first page of PLONE, as it appears to a logged-in user



5. Effort Reporting

This section (see Fig.3) contains all the internal reporting concerning the personnel effort per WP per person in man-days for each partner, as well as the costs per category (personnel effort, travels, subcontracting, equipment, other) for the respective partner to which the PLONE user belongs. It is a field where one (depending on her/his access level) can:

- create a new effort report,
- view effort reports, or
- get an overview of costs and personnel efforts.

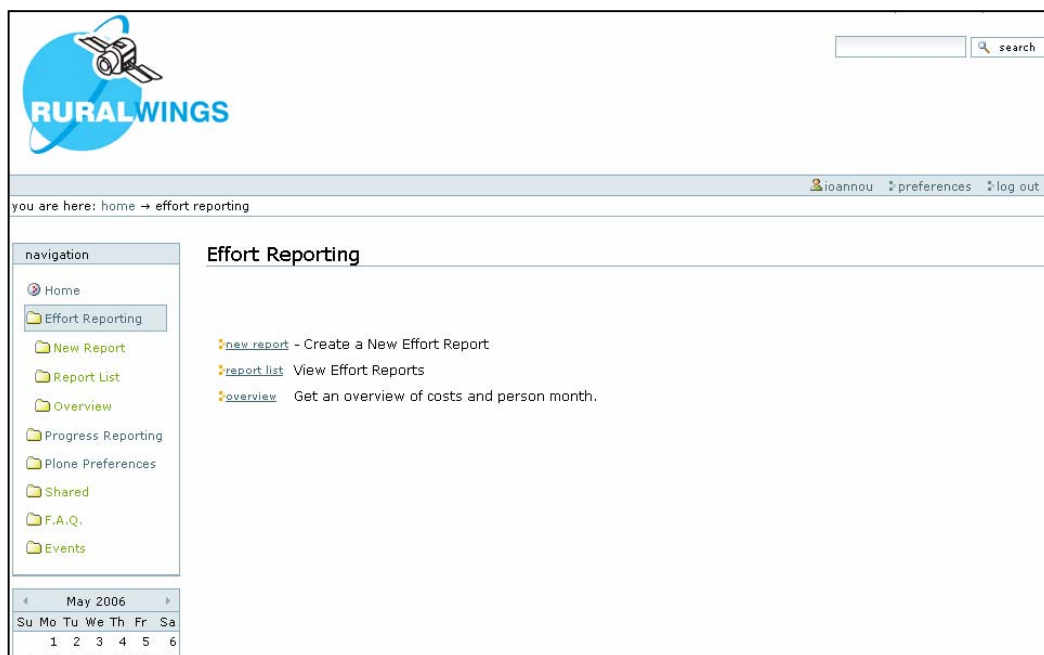


Figure 3: The Effort Reporting page

5.1 New Report

Only the **partner administrator** and the **reporter** can access this section. Once one enters, she/he can declare costs that her/his partner organization makes during a specific quarter.

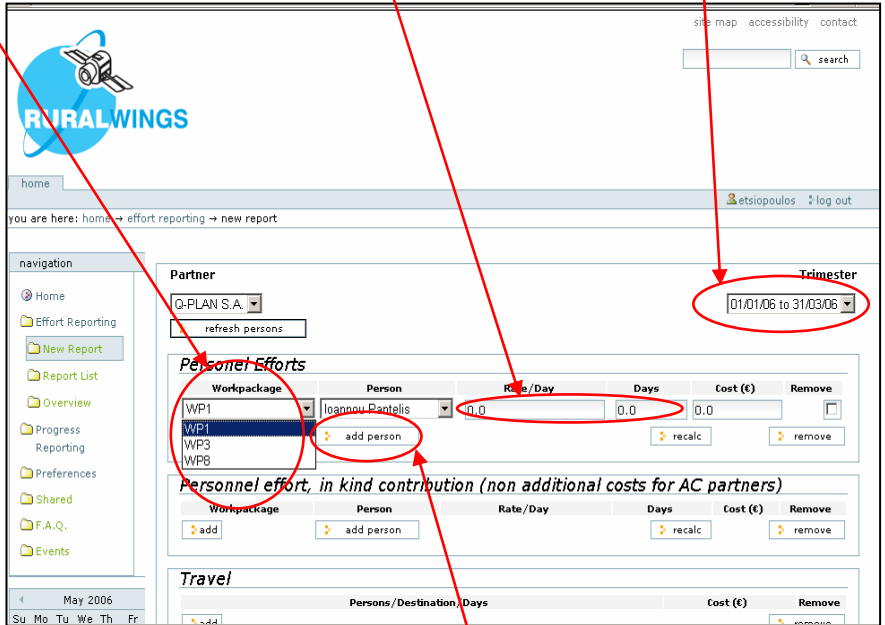
Personnel Efforts

The personnel effort costs are calculated from PLONE, once the PLONE user enters the respective Work Package, person, day rate and man-days and clicks on the

“recalc” button. The Work Packages that appear are only the ones in which the respective partner participates in. If one wants to declare effort for more than one persons or even for the same person but in different Work Package, she/he must click on the “Add” button, and a separate line will appear. One can also add a person from her/his organization (persons here are NOT necessarily PLONE users) (see Fig.4, Fig.5).

Personnel Effort, in kind contribution

The in kind contribution costs category interests mainly the AC cost model partners and concerns the non additional costs for the project. The declaration of the personnel effort in kind contribution is realized following exactly the same philosophy as in the personnel effort section.



The Work Packages that appear are only the ones in which the respective partner participates in

Obligatory Fields

Selector of reporting period

Trimester
01/01/06 to 31/03/06

Workpackage	Person	Rate/Day	Days	Cost (€)	Remove
WP1	Ioannou Pantelis	0,0	0,0	0,0	<input type="checkbox"/>
WP1	<input type="button" value="add person"/>				
WP3					
WP6					

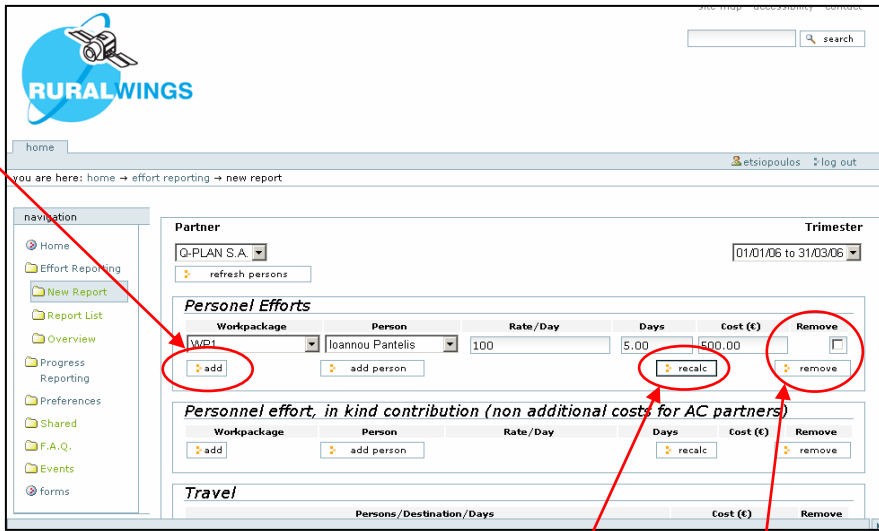
Personnel effort, in kind contribution (non additional costs for AC partners)

Workpackage	Person	Rate/Day	Days	Cost (€)	Remove
<input type="button" value="add"/>	<input type="button" value="add person"/>				

One can also add a person from her/his organization (persons here are NOT necessarily PLONE users)

Figure 4: Personnel Efforts page (1)

If one wants to declare effort for more than one persons, even for the same person but in different Work Package, she/he must click on the "Add" button, and a new line will appear



One has to click on the "recalc" button, in order for the cost to be calculated

The "remove" button is used for removing a person's effort

Figure 5: Personnel Efforts page (2)

5.2 Travel, Subcontracting, Equipment, Other

In "Travel" cost category, all costs realized during a travel made in the framework of the project (tickets, accommodation, food, etc.) are declared.

In "Subcontracting" cost category, each partner has to declare the costs spent for subcontracting needs for the project (e.g. printing of material, development and maintenance of web site, etc.).

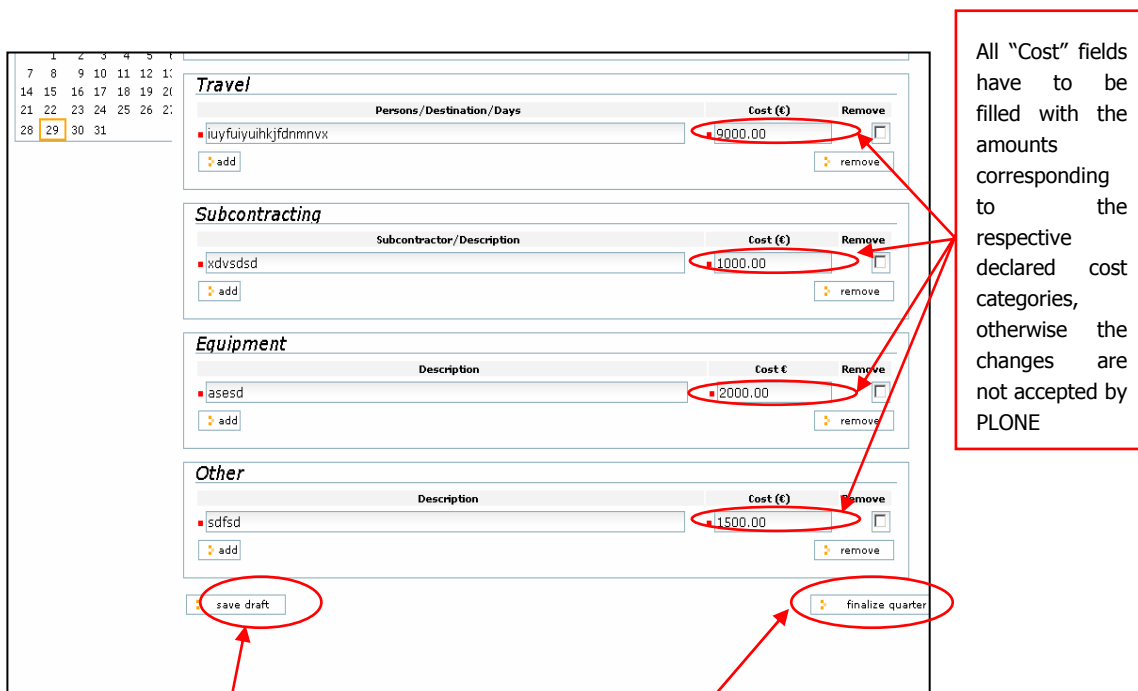
In "Equipment" cost category, all costs spent in order to buy necessary equipment (e.g. PCs, hardware, etc.) for the needs of the project are declared.

In "Other" cost category, each partner has to declare the costs spent for several needs (e.g. catering) of the project.

The costs in these categories are declared by giving a short description of the cost and the respective amount (see Fig.6). The "add" and "remove" buttons are used here also in order to add or remove a cost from the report.

5.3 Save draft and finalize

Every time one changes the report, she/he must click on the "save draft" button in order for her/his changes to be valid. When all the costs for the quarter are declared, one has to click on the "finalize quarter" button in order to finalize the report. Once the quarter is finalized the report for the next quarter opens, and the finalized report can be further altered only from the Project Office (see Fig.6).



All "Cost" fields have to be filled with the amounts corresponding to the respective declared cost categories, otherwise the changes are not accepted by PLONE

The "save draft" button is used in order for any changes to the declared costs to be valid

The "finalize quarter" button is used in order for the report for the specific quarter to be finalized. It locks the current report and opens the one for the next quarter

Figure 6: Travel, Subcontracting, Equipment and Other costs categories

5.4 Report List

This section is accessible from all categories of PLONE users except the member and gives an aggregated view of the effort report (see Fig.7). If the PLONE user is a partner administrator or a reporter, she/he can also have an analytical view of the report by clicking on the respective dates of the quarter she/he is interested in. The viewer can only view the aggregated report.



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Sometimes the user has to click on the "refresh" button in order for the reports to appear

A partner administrator or a reporter can also have an analytical view of the report by clicking on the dates of the quarter she/he is interested in

Figure 7: The Effort Report List page

5.5 Overview

This section (see Fig.8) is accessible from all categories of PLONE users except the member and gives an overview of the effort report. The costs are presented in total, as well as per year of the project, per category and per work package, and also as percentage of the budget for the respective cost category.

Total Budget (EC and Partners contribution)

Figure 8: The overview section of the Effort Reporting



6. Progress Reporting

This section contains all the internal reporting concerning the progress per WP for each partner to which the PLONE user belongs. It is a field where one (depending on her/his access level) can:

- create a new progress report, or
- view progress reports

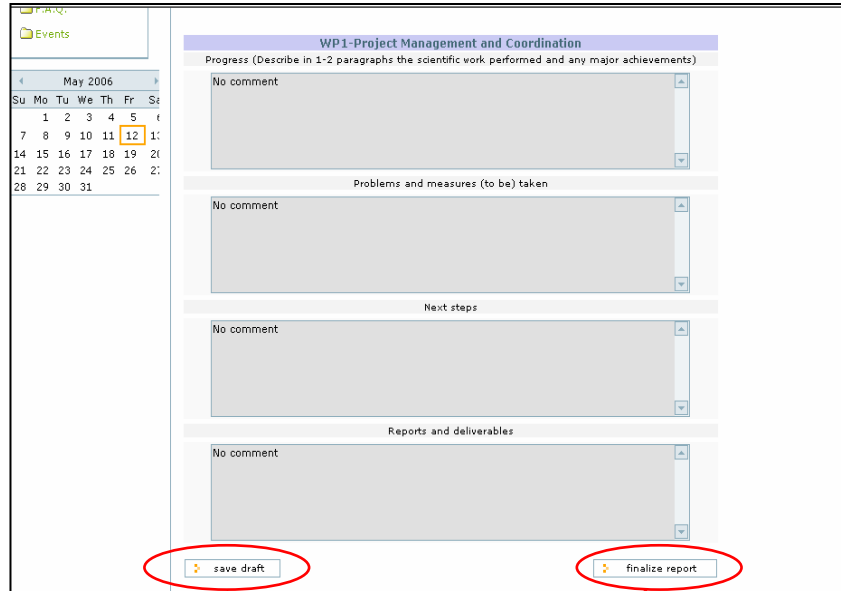
6.1 New Report

Only the **partner administrator** and the **reporter** can access this section. Once one enters, she/he can declare for a specific quarter (for the partner organization she/he belongs to):

- The progress of work and major achievements per WP,
- Relative problems and corrective actions in each WP,
- Next steps within the WP, and
- The progress on reports and deliverables per WP.

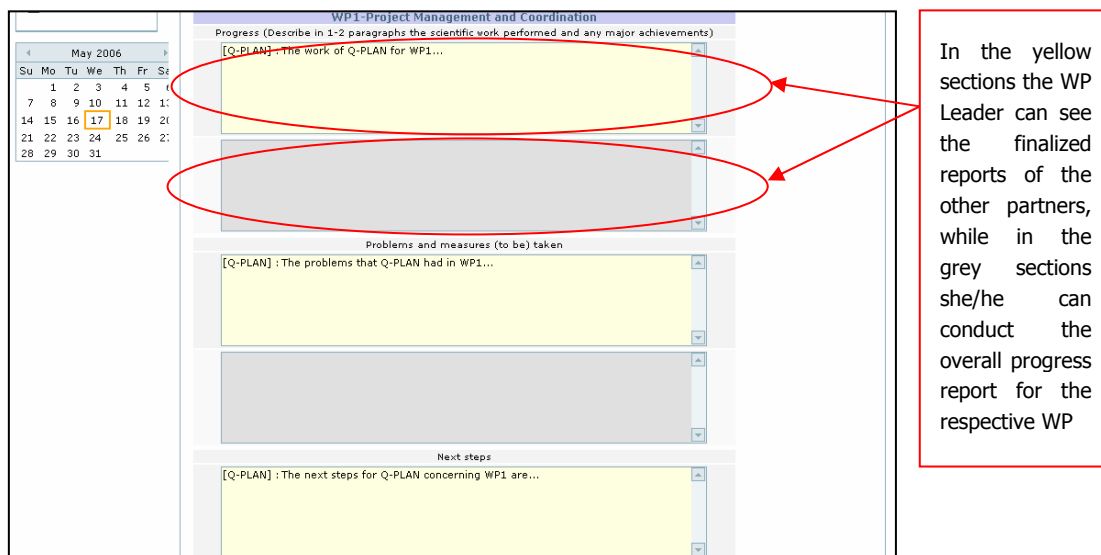
Here, as in the "New Report" section of the Effort Reporting, one has to save the draft every time a change in the report is made in order for the change to be valid, and once she/he finalizes the report, it locks and the report for the next quarter opens (see Fig.9).

When the PLONE user that enters this section is also a WP leader, she/he can see the reports from all the partners for her/his WP of responsibility when these are finalized for the specific reporting period (see Fig.10, yellow sections), as well as compose an aggregated progress report for the WP, piecing together the reports from all partners (see Fig.10, grey sections). Once the WP leader finalizes her/his progress report, this is considered to be the overall WP report for the specific quarter.



It is very important not to forget to save draft every time a change in the report is made, and to finalize the report in order to lock the document and open the report for the next quarter

Figure 9: New Progress Report

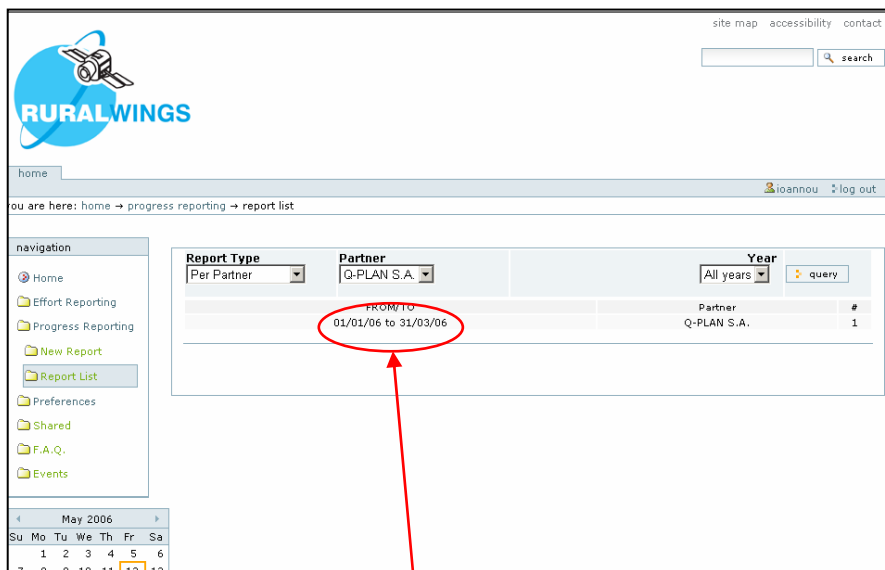


In the yellow sections the WP Leader can see the finalized reports of the other partners, while in the grey sections she/he can conduct the overall progress report for the respective WP

Figure 10: New Progress Report for WP leader

6.2 Report List

This section is accessible from all categories of PLONE users except the member and gives an overview of the progress reports in general, as well as per partner and per year. If the PLONE user is a partner administrator or a reporter, she/he can also have an analytical view of the report by clicking on the respective dates of the quarter she/he is interested in. The viewer and the reviewer can only view the overview of the reports (see Fig.11).



A partner administrator or a reporter can also have an analytical view of the report by clicking on the dates of the trimester she/he is interested in

Figure 11: The Progress Report List page

7. Plone Preferences

Only the **partner administrator** and the **reporter** can access this section (see Fig.12). Depending on her/his access level, one can:

- add a new PLONE user or remove an existing one from her/his partner organization, and
- modify the access level, password or e-mail address of an existing PLONE users from her/his partner organization.

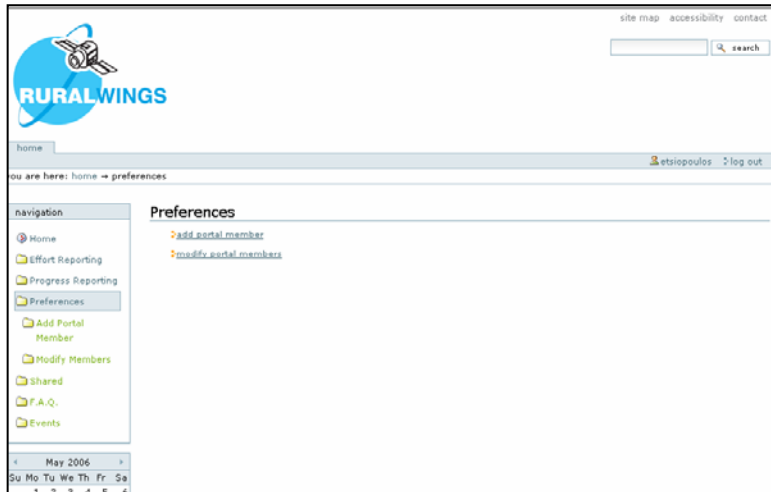


Figure 12: The "Plone Preferences" page

7.1 Add portal member

Only the **partner administrator** can access this section. She/he can declare a new PLONE user from the same partner organization, providing her/him with a personal username and password. Once all the compulsory fields are completed, the administrator has to click on the "register" button in order to activate the new PLONE user.

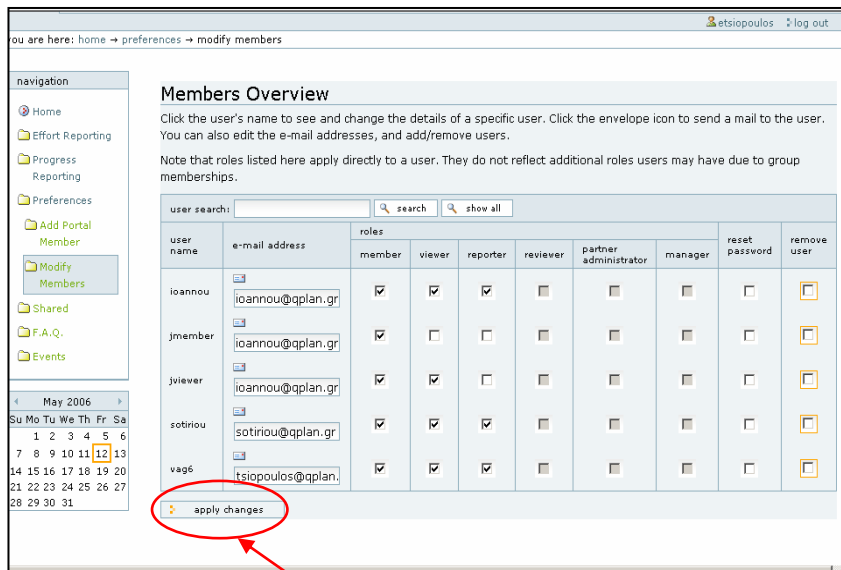
 This is a screenshot of the "Add portal member" form. The form is titled "Personal Details" and contains several required fields: "Full Name", "User Name", "Phone", "Belongs to partner", "E-mail", "Password", and "Confirm password". Each field has a text input box and a label indicating it is required. The "Belongs to partner" field has a dropdown menu with "G-PLAN S.A." selected. There is a checkbox for "Send a mail with the password" which is currently unchecked. At the bottom of the form, there is a "register" button. A red circle highlights the "register" button, and a red arrow points from a text box below to it.

The "register" button activates the access of the new PLONE user

Figure 13: The "Add portal member" page

7.2 Modify portal members

Only the **partner administrator** and the **reporter** can access this section. The administrator can alter a user's role and access level and e-mail address, reset a user's password or even remove a PLONE user. The reporter can change the role of a user who is a member or a viewer. Once the modifications are done, the user must click on the "apply changes" button in order for the changes to be valid (see Fig.14).



The user must click on the "apply changes" button in order for the changes to be valid

Figure 14: The "Modify portal members" page

8. Shared

This section is accessible from all categories of PLONE users. It is essentially a common server, a space where the project partners download, upload and share documents and files related to the project. Additionally, one can choose between a set of actions (cut, copy, paste, etc.) and display options (view format) (see Fig.15).

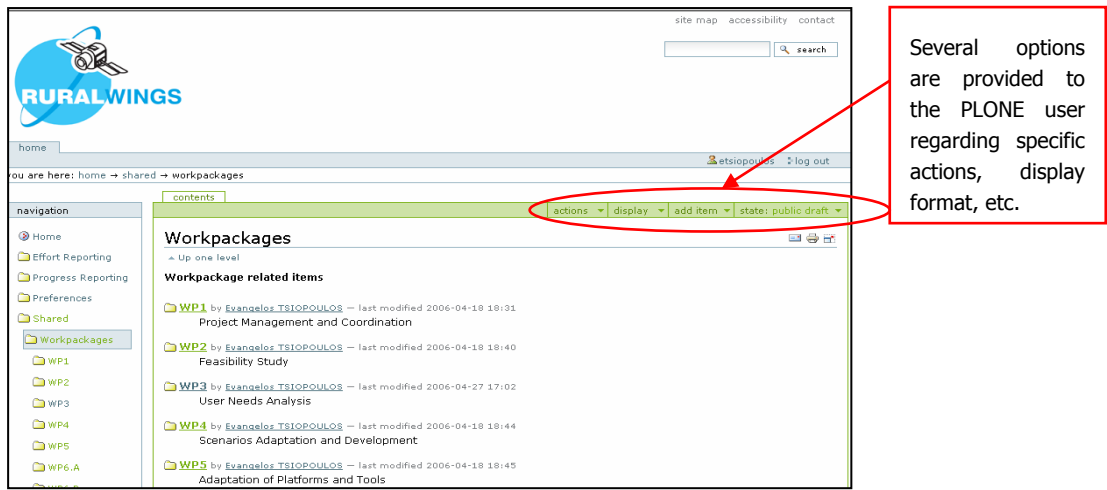


Figure 15: The "Shared" section of PLONE

9. F.A.Q

This section is accessible from all categories of PLONE users. It contains frequently asked questions about PLONE and provides the user with useful information concerning the tool's functions (Fig.16).

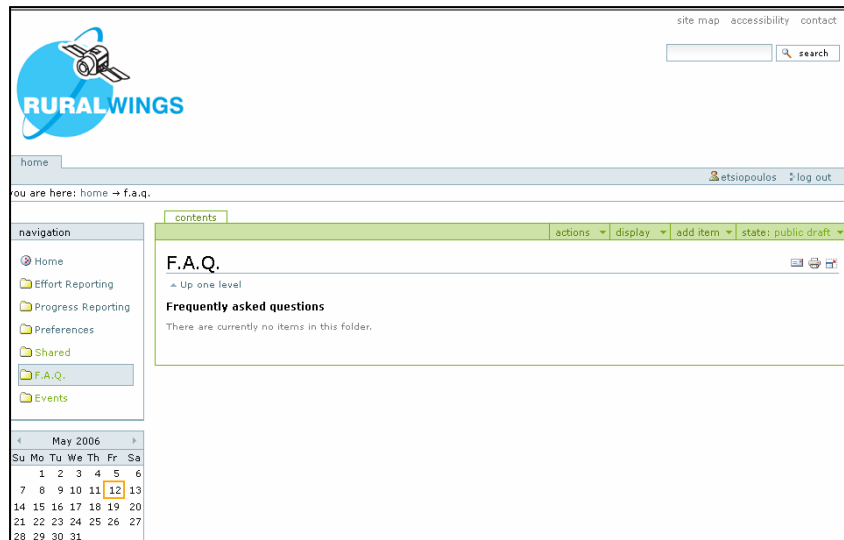


Figure 16: The "F.A.Q." page of PLONE

10. Events

This section is accessible from all categories of PLONE users. It contains information about all the events related to the project, already realized or planned for the future. If one wants to add an event, she/he must click on the "event" option of the "add



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item” scroll down menu (see Fig.17). When one does so, the “Edit Event” page opens, where the PLONE user puts all the relevant information for the event. In order for the new event to be uploaded in PLONE, or an existing one to be changed (e.g. dates), the user must save in the “Edit Event” section (Fig.18).

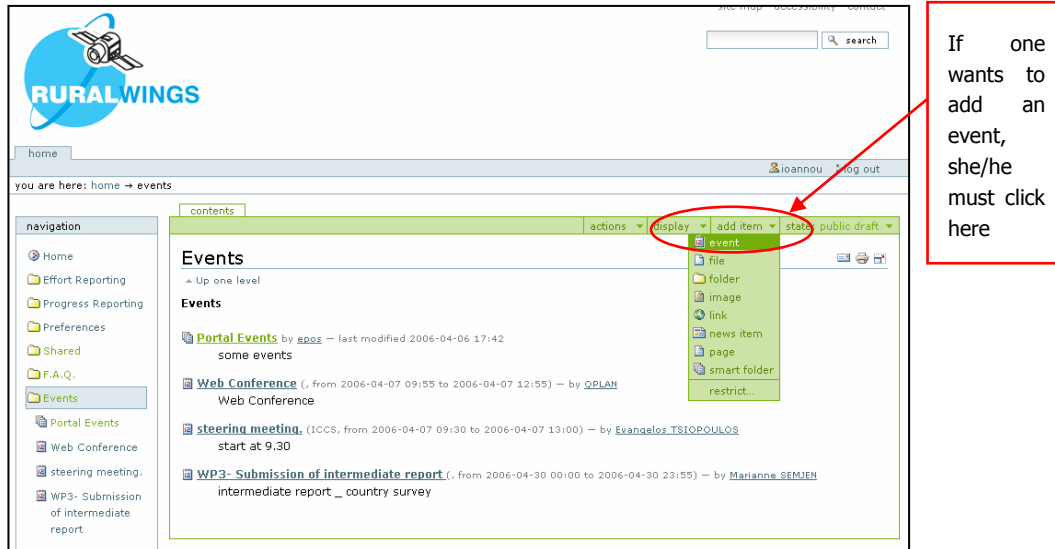


Figure 17: The “Events” page of PLONE

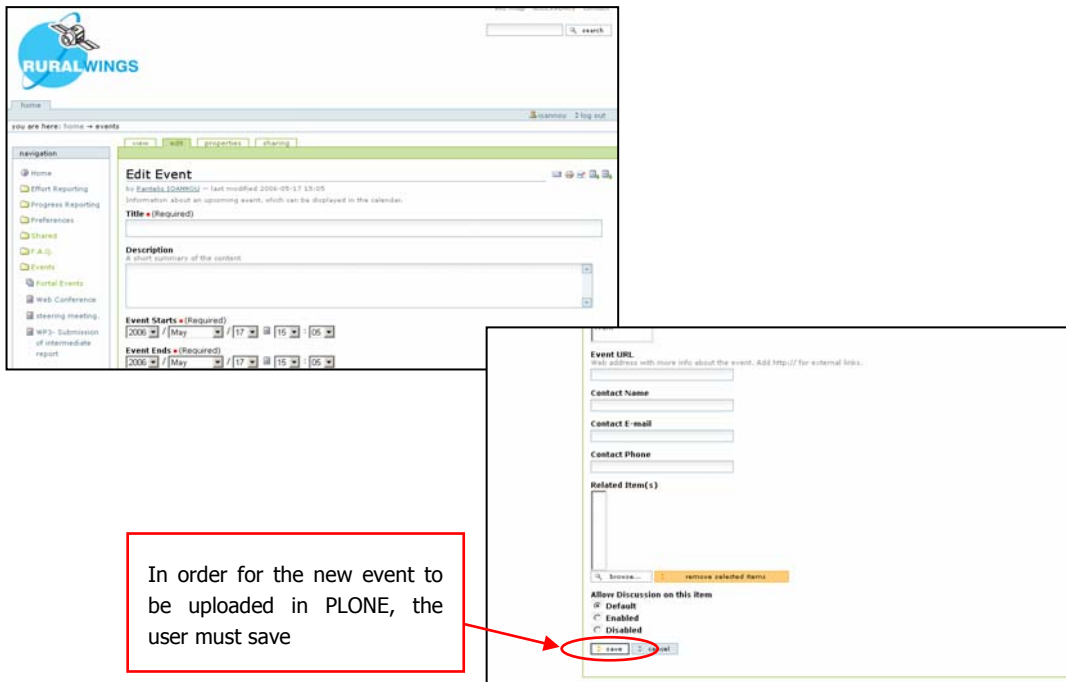
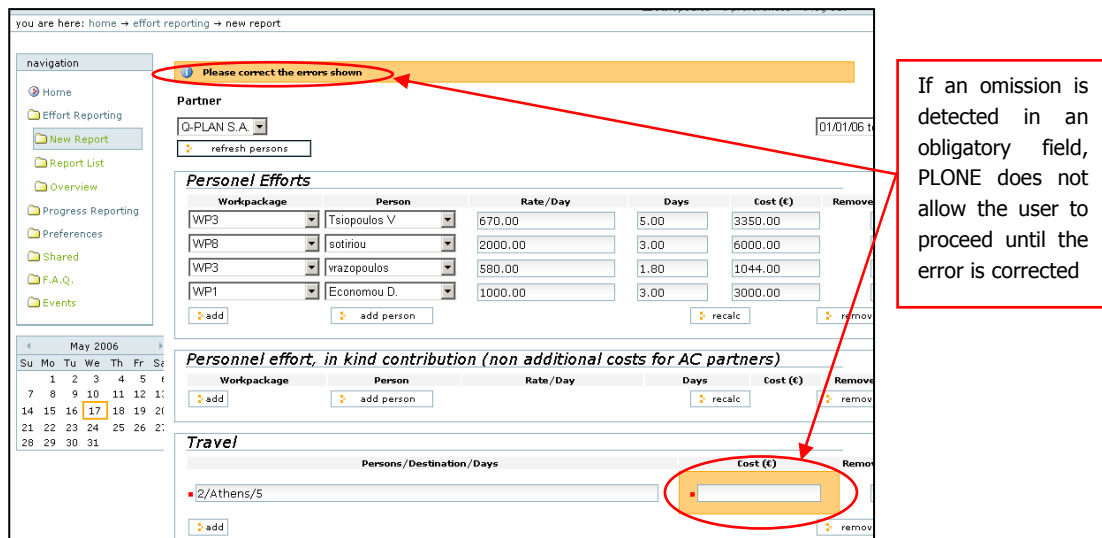


Figure 18: The “Edit Event” section

11. PLONE Error Reminder

There are some obligatory fields in PLONE which, if not completed, the user cannot proceed to the next step of her/his action. For example, in one does not fill in a cost in the Effort Reporting: New Report, the report cannot be saved and PLONE marks the field in which the omission was detected (see Fig.19).



you are here: home → effort reporting → new report

navigation

- Home
- Effort Reporting
 - New Report
 - Report List
 - Overview
 - Progress Reporting
 - Preferences
 - Shared
 - F.A.Q.
 - Events

Partner: Q-PLAN S.A. [01.01.06 1...]

refresh persons

Personnel Efforts

Workpackage	Person	Rate/Day	Days	Cost (€)	Remove
W/P3	Tsiopoulos V	670.00	5.00	3350.00	
W/P8	sotiriou	2000.00	3.00	6000.00	
W/P3	vrazopoulos	580.00	1.80	1044.00	
W/P1	Economou D.	1000.00	3.00	3000.00	

add | add person | recalc | remove

Personnel effort, in kind contribution (non additional costs for AC partners)

Workpackage	Person	Rate/Day	Days	Cost (€)	Remove

add | add person | recalc | remove

Travel

Persons/Destination/Days	Cost (€)	Remove
2/Athens/5		

add | remove

If an omission is detected in an obligatory field, PLONE does not allow the user to proceed until the error is corrected

Figure 19: Example of PLONE error reminder