

# HIGH INTEGRATION OF RESEARCH MONOGRAPHS IN THE EUROPEAN OPEN SCIENCE INFRASTRUCTURE

## Deliverable 1.3 Collaborative web platform

<b>Grant Agreement number</b>	: 731102
<b>Project acronym</b>	: HIRMEOS
<b>Project title</b>	: High Integration of Research Monographs in the European Open Science infrastructure
<b>Funding Scheme</b>	: EINFRA-22-2016
<b>Project's coordinator Organization</b>	: CLEO-CNRS
<b>E-mail address</b>	: pierre.mounier@openedition.org
<b>Website</b>	: <a href="http://operas.hypotheses.org">http://operas.hypotheses.org</a>
<b>WP and tasks contributing</b>	: WP 1 Task 1.3
<b>WP leader</b>	: CLEO-CNRS
<b>Dissemination level</b>	: PU
<b>Due date</b>	: 28 feb. 2017
<b>Delivery date</b>	: 7 mar. 2017

The project has received funding from European Union's Horizon 2020 research and innovation programme under grant agreement 731102.



This publication reflects only the author's views – the Community is not liable for any use that may be made of the information contained therein.

## Contents

I.	Introduction .....	3
II.	Internal communication .....	3
A.	Mailing lists .....	3
B.	Slack web application .....	3
C.	E-mails .....	3
III.	Sending and sharing files .....	4
A.	Slack web application .....	4
B.	Google Drive.....	4
1.	Storage.....	4
2.	Collaboration .....	4
IV.	Managing the files .....	5
A.	Files format.....	5
B.	Files versioning.....	5
C.	File naming policies .....	5
V.	Project management with Trello .....	6
VI.	Deliverable template.....	7
VII.	Annex.....	8
A.	Annex I : Slack's « plus button » .....	8
B.	Annex II : Slack's file search .....	8
C.	Annex III : Google Drive comments.....	9
D.	Annex IV : Google Drive task assignment .....	9
E.	Annex V : HIRMEOS project on Trello .....	10

## I. Introduction

The « collaborative web platform » hereby describes the communication tools and means used by the participants of the HIRMEOS project for general internal communication, for coordination and management of the task implementation and for file sharing and storage.

This document also constitutes a user guide for the Work Package (WP) leaders and participants.

Different aspects of the communication between participants will be addressed in this document :

- Internal communication within the HIRMEOS project.
- Sharing, sending, storage and organization of the files related to the project.
- Common policies regarding the management of the files.
- Use of a project management tool for up-to-date information.
- Elaboration of a deliverable template.

## II. Internal communication

### A. Mailing lists

Mailing lists allow their subscribers to communicate between them within a formal framework of the project. The messages might concern the internal communication of the project, as for instance general meetings, announcement or communication of the meeting's minutes, project changes request and approval or any global issue that might influence the financial and administrative implementation of the project.

A mailing list has been created for the HIRMEOS project on the French public research communication network, RENATER (<https://www.renater.fr/>). The email address of the list is [hirmeos@groupe.renater.fr](mailto:hirmeos@groupe.renater.fr). It allows any subscriber to receive and write messages from and to the "hirmeos" list.

### B. Slack web application

By default, *Slack* (<https://hirmeos.slack.com/>) is the internal communication tool within a specific WP for the task implementation.

*Slack* is a web application for team collaboration that allows instant messaging, storage and retrieval of files and also video calls. It can be organized in channels, each one on a specific topic; in the case of HIRMEOS, channels correspond to each Work Package.

*Slack* is used in order to have a centralized information. For that the appropriate channel has to be selected when communication occurs within a Work Package.

*Slack* allows also to chat with only one of the members. The discussion will be stored and remain accessible to the members involved.

### C. E-mails

Because of the use of *Slack*, communication via personal institutional e-mails should be exceptional within the HIRMEOS project. They can be used only for a specific purpose which *Slack* couldn't help to achieve.

In the case e-mails are being used, mail subject can indicate the project and the concerned WP. The identification code proposed further in this document can be an easy way to give this kind of information (see File naming policies).

### III. Sending and sharing files

#### A. Slack web application

As stated above, *Slack* offers also features to manage files. The same recommendation as before applies also to the files sending (deliverables, work plan, reports,...) : best practice would be using the *Slack* web application by default.

There are various ways to upload a file on *Slack* :

- Drag-and-drop a file in a channel.
- Click green “Plus button” on the left of the message input line to upload a file or to integrate a file from *Google Drive* (see Annex I).

For more information on this topic and *Slack*'s basic features, see : <https://get.slack.help/hc/en-us/articles/218080037-Getting-started-for-new-users#files-posts-and-snippets> .

The sending of files via the *Slack* web application could be of great interest for WP leaders and the Project Management Team (PMT). In fact, the *Slack* search field contains some useful features in that respect, especially :

- Using the “in:” modifier, it’s possible to retrieve all files of a specific channel (see Annex II).
- Using the “from:” modifier allows you to retrieve all files sent by a specific member.

#### B. Google Drive

*Google Drive* is used as a file storage platform and as a collaborative tool.

##### 1. Storage

A specific folder has been created on *Google Drive* for the HIRMEOS project, unequivocally named “HIRMEOS” and with a tree-structure based on the various WPs.

HIRMEOS folder has seven subfolders corresponding to the seven WPs. Each subfolder in turn is divided into as many subfolders as tasks.

Here’s the link to the folder :

<https://drive.google.com/drive/folders/0B7w5bP7kIGKqODRWX294ZnVTZGM> .

Under the responsibility of the PMT, if not already done by the WP leader or the participants, the stabilized or final versions of the files have to be integrated to the related folder.

In order to assure minimal backup policy, at least the final version of a deliverable has to be deposit both on *Slack* and on *Google Drive*. This will be easy to achieve as *Slack* is integrated with *Google Drive*.

##### 2. Collaboration

Every person working on the project has been given an authorization to share, read, comment and

modify files on the *Google Drive* HIRMEOS folder.

Under the responsibility of the WP leader, if the file needs to be collectively edited, participants should deposit a shared version in the related folder.

*Google Drive* documentation about commenting and editing can be found here : <https://support.google.com/docs/answer/65129?hl=fr&co=GENIE.Platform=Desktop> .

Any member of the HIRMEOS project can comment a shared file using the “Comments” button. Comments can be answered and closed (see Annex III).

With the “Comments” button, it’s possible to assign a task to someone using the institutional e-mail. The person will be notified of the task assignment (see Annex IV).

Comments don’t modify the file.

The modification of the file depends on the mode : it can be “editing” or “suggesting”.

The default mode of a shared file is “editing”. It allows direct modification and saving of the file.

Shifting to “suggesting” mode allows reviewing portions of the file which can then be accepted or refused.

## IV. Managing the files

### A. Files format

*Google doc* sharing should always be preferred to sending document to review by email. Only finalized versions should be sent by email.

Other formats should only be used for specific editing or styling work.

### B. Files versioning

*Google Drive* automatically register the modifications. For this reason, and to facilitate the reviewing by the participants, files will not be versioned within the HIRMEOS project.

Only the version sent to the H2020 Participant’s Portal will be marked “final” in its name.

### C. File naming policies

Every file added to the HIRMEOS project and related to a WP should abide to some naming policies. This will facilitate the retrieving from the various tools used by the project : *Google Drive*, *Slack*, e-mail.

It’s better to avoid spaces in the file names. It’s possible to connect the different parts with underscores or dashes. When doing so, each word can be in lowercase.

Another possibility is to use the camel case.

The filename should give some minimal information so that it can be easily identified and retrieved.

Minimal information is :

- a code referring to the project, the WP and the task;
- the producer of the file;
- the subject or title.

The file naming pattern will be the following (within brackets is the variable part) :

**HI [ WP number + Task number ] - [ producer ] - [ subject ] - [ subject ] - ... ( \_final)**

*Details :*

1. "HI" for HIRMEOS project
2. Number of the Work Package (1, 2, 3,...)
3. Number of the task (1, 2, 3,...)
4. Producer (acronym of the participant : EKT, CLEO, UGOE,...)
5. Subject section : a few words, connected with underscore or dashes
6. (Final version mention)

*Examples :*

From : WP 2 - implementation in OAPEN Library and DOAB  
To : HI22-OAPEN-implementation-Library-and-DOAB

From : orcid-workflow  
To : HI23-CLEO-orcid-workflow

## V. Project management with Trello

The PMT gathers all the information about the on-going tasks in the project management web tool *Trello*. This web application can be integrated with *Slack* and allows in that case to do some updates from the *Slack*'s channels.

The HIRMEOS Trello URL is : <https://trello.com/b/QYaddm35/hirmeos> .

*Trello* (<https://trello.com>) allows its subscribers to create boards (for specific missions) containing cards (the various tasks of the mission). Cards can have checklists, e.g. the phases of the task. They can also have "due dates", e.g. the due dates of the deliverables.

In the case of HIRMEOS, boards correspond to each WP and the cards correspond to the tasks of the WP. Specific tags distinguish deliverables (orange) and implementation (light blue); deliverables to do are at the top of the corresponding WP board. Yellow tag is for reporting tasks. Finished deliverables are moved in the "Delivered" board (red tag); finished implementations are moved in the "Implemented" board (dark blue).

The *Trello* HIRMEOS project will be accessible to HIRMEOS team but managed by the PMT (see Annex V).

## VI. Deliverable template

In order to have a unified presentation of its works, the HIRMEOS team has decided to create a template for its deliverables.

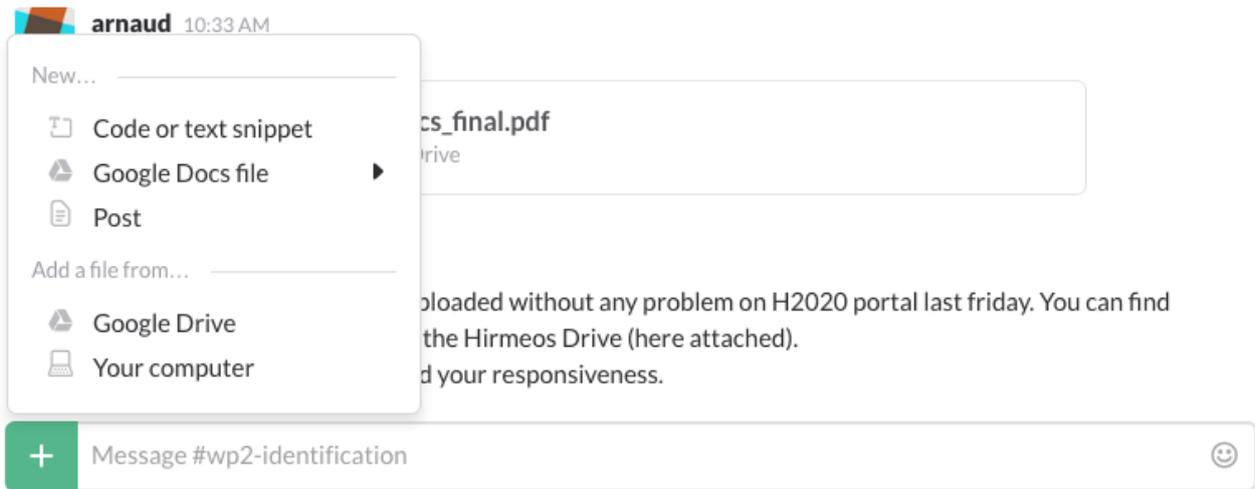
There are two templates, one in .doc and one in .odt format, at the root of the HIRMEOS *Google Drive* folder : <https://drive.google.com/drive/folders/0B7w5bP7kIGKqODRWX294ZnVTZGM>

Basic workflow should consist of a first collaborative draft on Google Drive, followed by an integration of the content into the template for a more advanced editing or styling.

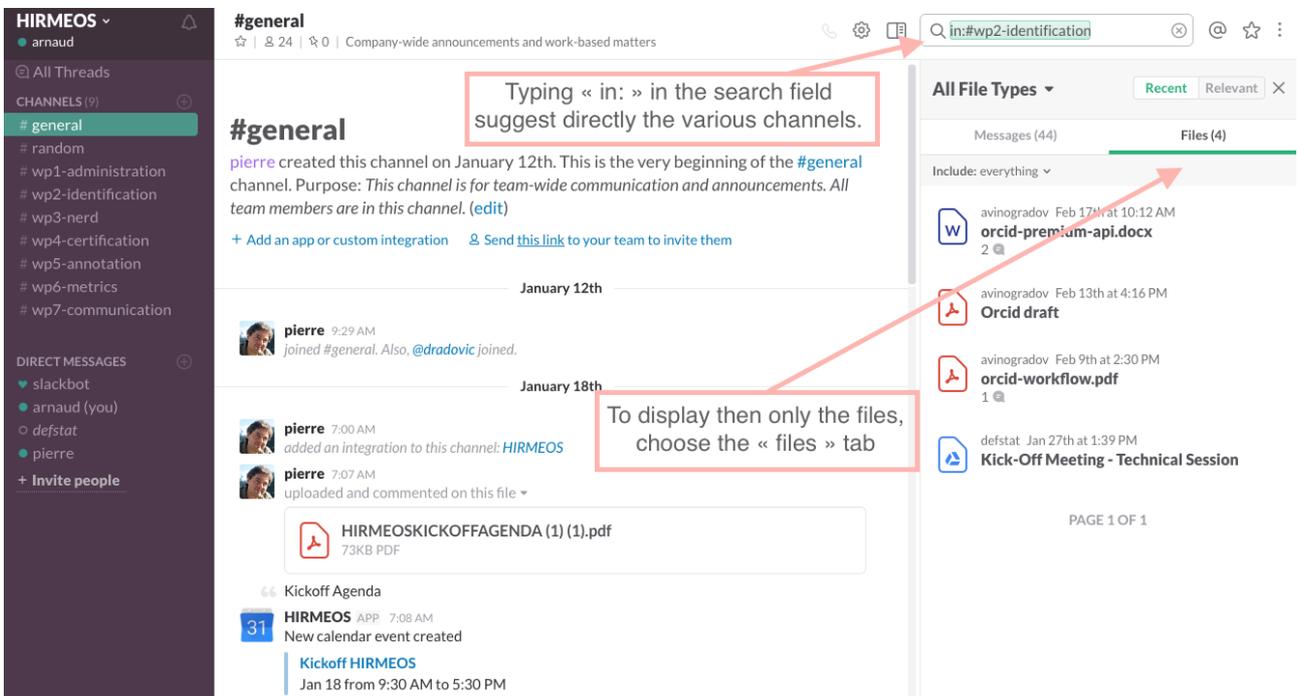
The deliverable template contains the administrative information required for periodic and final reports. It reproduces the legal mention needed for the H2020 funded projects.

## VII. Annex

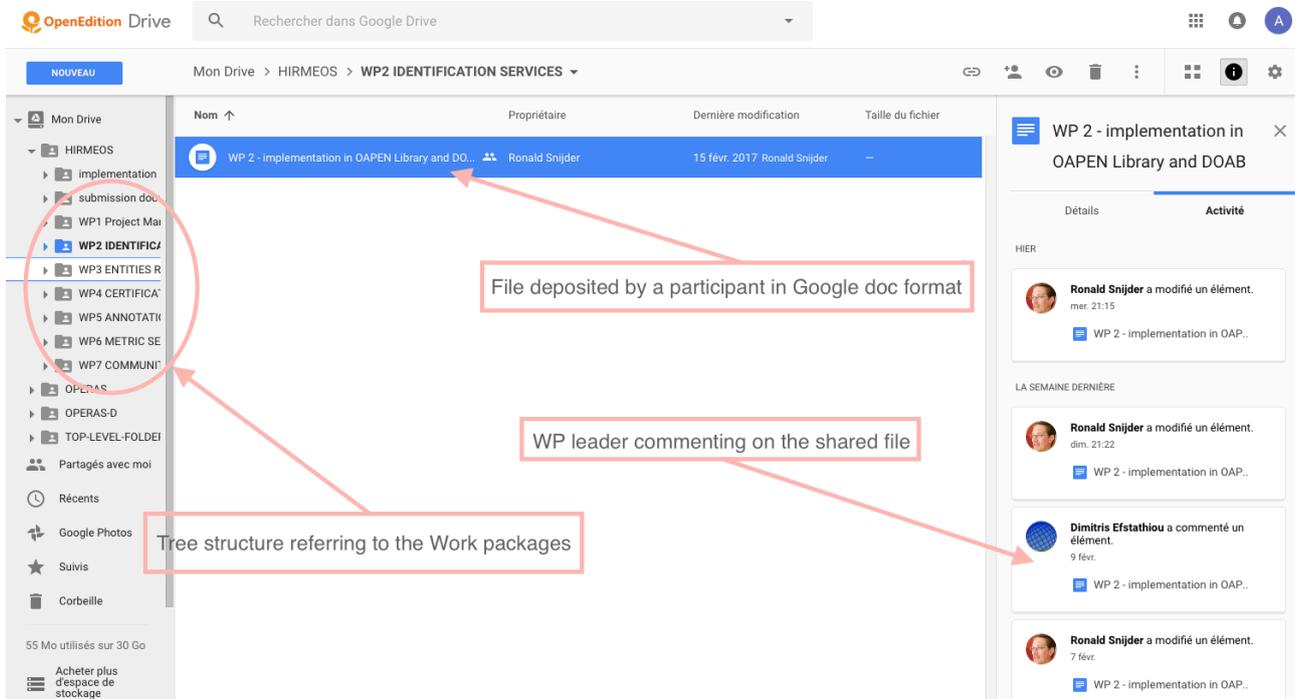
### A. Annex I : Slack's « plus button »



### B. Annex II : Slack's file search



### C. Annex III : Google Drive comments



### D. Annex IV : Google Drive task assignment

#### b) Collaboration

Every person working on the project has been given an authorization to share, read, comment and modify files on the *Google Drive* HIRMEOS folder.

Under the responsibility of the WP leader, if the file needs to be collectively edited, participants should deposit a shared version in the related folder.

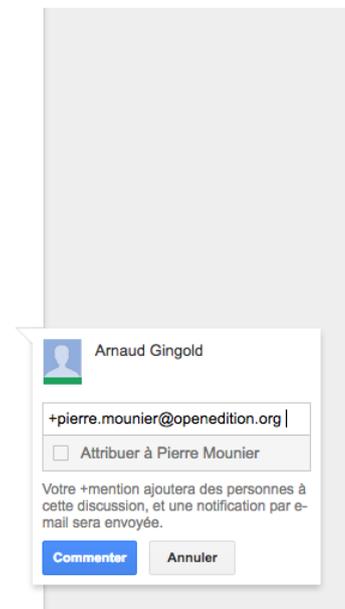
*Google Drive* documentation about commenting and editing can be found here : [https://support.google.com/docs/answer/65129?hl=fr&co=GENIE\\_Platform=Desktop](https://support.google.com/docs/answer/65129?hl=fr&co=GENIE_Platform=Desktop) .

Any member of the HIRMEOS project can comment a shared file using the "Comments" button. Comments can be answered and closed.

With the "Comments" button, it's possible to assign a task to someone using the institutional e-mail. The person will be notified of the **task assignment**. Comments don't modify the file.

The modification of the file depends on the mode : it can be "editing" or "suggesting". The default mode of a shared file is "editing". It allows direct modification and saving of the file.

Shifting to "suggesting" mode allows reviewing portions of the file which can then be accepted or refused.



## E. Annex V : HIRMEOS project on Trello

