Ubiquitous Process Modelling Tool
(*Template and examples for usage*)

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for usage of particular examples, simply copy & paste into your form and complete data

Please cite this model/tool as:

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Detailed Process Planning for "Deliverable/Task Name"

Considering: Dn.m/Tn.m (deliverable/task number) Deliverable/Task Name (slide number/of total slides)
Document purpose: Deliverable Planning, Part 1; **Leading Partner:** acronym of responsible leader
Contributing Partners: acronyms of all contributing partners; **To be reported to:** acronym responsible partner
Deliverable starting time: YYYY, Month DD
Deliverable ending time: YYYY, Month DD
Deliverable needs to be ready for review by latest: YYYY, Month DD (at least 1 month before official deadline because of reviewing)

Input # - Status of Input (Initial/interim, a.o.): *Name of Input*
Type of Input: e.g., Document, raw data, evaluated data, final deliverable version, draft deliverable version, …
For Activity: Name of direct following activity that requires input
Contributor: Name of partner that provides input
Input needed by date: YYYY, Month, DD (Mn (project month)

All Inputs are referenced with large letters, starting by "A" (A, B, C, … Z, ZA, ZB, …

Activity number – Activity: name of activity and dedicated output
Requires/bases on: (If there is an initial input for the activity, name it here, else, "n.a.".
Contributor(s): Partner
Output of this Activity needed by: YYYY, Month DD
Type of output: (descriptive document, software, questionnaire data, interview data, desk research data, meeting data, event organization, …)
Final reviewed/reworked version needed by: YYYY, Month DD
Start of Activity: YYYY, Month DD
End of Activity: YYYY, Month DD (Project month, e.g., "M1")

All activities start with "A" and afterwards are numbered with ongoing numbers: A01, A02, A10, … An

I - Output*: name and type of the output*
***a.Needed for:** Activity or Deliverable/Task number*
  ***From:** (Acronym Partner Name)*
    Draft Version needed by: YYYY, Month DD
Deadline for Output: YYYY, Month DD (Project month, e.g., "M1")

All outputs are referenced by Roman numbers, I, II, .. IV, .. , X, …)

If an output is not further used but "just" a deliverable, the "production of the final deliverable version" shall be the activity documented here

If for further steps a draft version may be sufficient, please document this here, else delete the line

Yearly Schedule Overview
Title: Deliverable/Task Number, Deliverable/ Task Name (slide n/N slides)
Document purpose: Deliverable Planning in a Nutshell
Leading Partner: Partner acronym

A(Activity Number) Name of activity or activity # (Start Month DD)

From: DX.Y, Deliverable responsible partner
Name of needed Input,/activity # by YYYY, Month DD

For DX.Y Name of Deliverable/Task/Activity
by YYYY, Month DD (Output Activity #A1, …, Output Activity #An, …)

M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
MM 'YY	MM 'YY	MM 'YY	MM 'YY	MM 'YY	MM 'YY	MM 'YY	MM 'YY	MM 'YY	MM 'YY	MM 'YY	MM 'YY
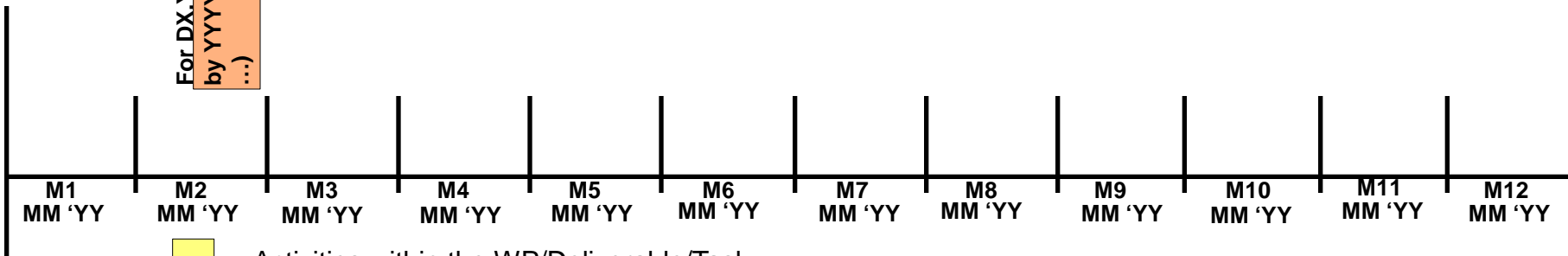
Activities within the WP/Deliverable/Task

Input required for own work within the task/deliverable (required from other partners)

Output from own task/deliverable for other tasks/deliverables (required by other partners)

Example for Simple activity with Pre and Post condition

A: Type of Input: *Consolidated & Evaluated Results SWOT Analysis*
Contributor: XXX
Complete input needed by date: M8-9

A01: Activity: *Implement Delphi Study*
Contributor: XXX
Output of this Activity needed for: Conduct Delphi Study
Type of Output: online questionnaire
When to be completed: M9-10

I: Outcome*: e-Mail Invitation to Participate w. Link to Delphi Study (to all partners)*
Needed for: periodical check for project improvement potential

Example for simple activity with several Pre conditions (and a post condition)

A: Type of Input: *Report Tool Implementation Progress*
B: Type of Input: *Report Meeting Questionnaire (all meeting(s) within period of reporting)*
C: Type of Input: *Report on DRM (just first year and final report)*
D: Type of Input: *Report on GRAQ Results (all versions in period of reporting and development)*
E: Type of Input: *Reports on DPM/SRAQ/CAM results per WP (all reports from within reporting period & development*
H: Type of Input: *Statistical Report on Participants in the various activities*
I: Type of Input: *Report on SWOT Analysis Results*
J: Type of Input: *Report on Project Improvement Potential*
K: Type of Input (for Final QM Report only): *Interim QM Report*
Contributor: XXX
inputs needed by date: M9/21/33

A01: Activity: *Write Interim QM Report*
A02: Activity: Write Final QM Report
Contributor: XXX
Output of this Activity needed for: reporting (coordinator)
Type of Output: document (MS Word)
When to be completed: M10 & M22 (Interim); M34 (Final)

I: Outcome*: Interim Progress Report*
To be transmitted to: coordinator

Example for several inputs joined in a single field

H: Type of Input: *Completed SRAQ Tx.1-Tx.n from Task Leaders & Work Package Leader WPx*
I: Type of Input: *Completed DPM Dx.1-Dx.n from Work Package Leader WPx*
Provided by: (automatically online, notification by Work Package Leader WPx)
By when: asap after completion, latest 1 week after link sent out
Recipient: XXX

A07: Activity: *Evaluate Results DPM/SRAQ WPx*
Data to be used: Data from Online Questionnaire
Who responsible to complete: XXX
When to be completed: asap (after notification)

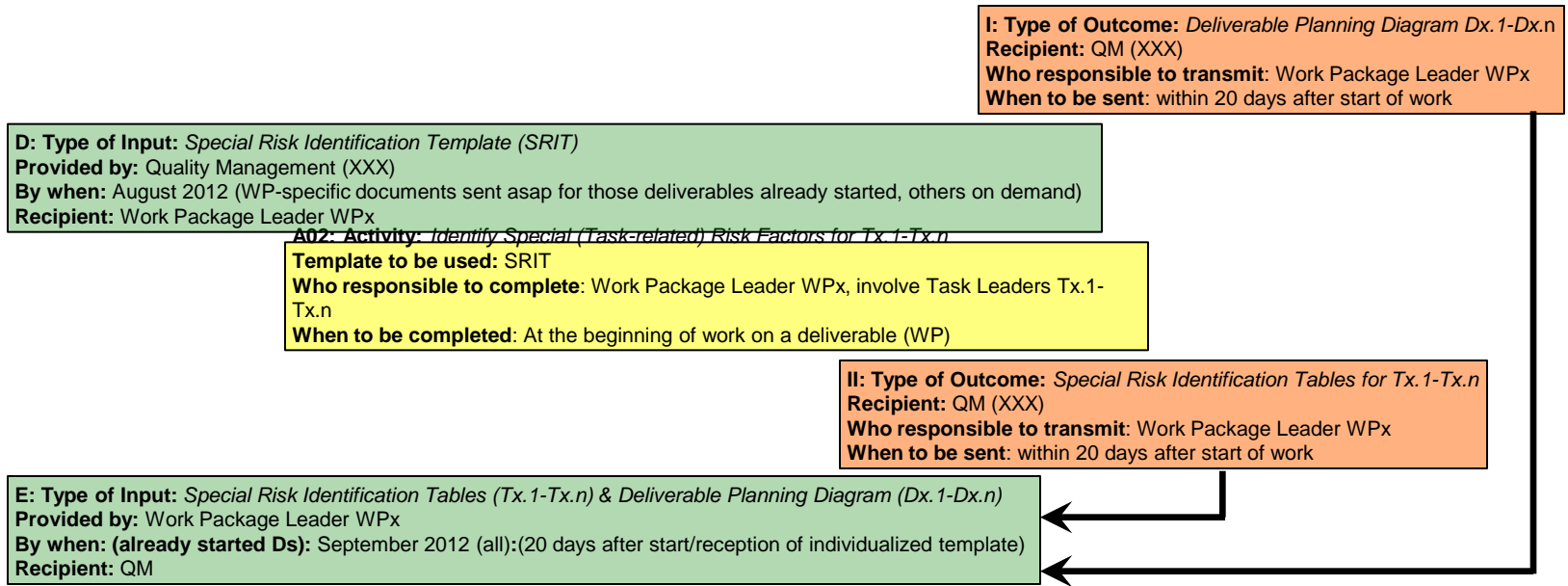**A08: Activity:** *Report on Progress & Risk Status WPx*
Input to be used: Results from Activity 1
Who responsible to complete: XXX
When to be completed: within 7 days after data reception

Example for several outcomes from different sources jointly forming input for activity

I: Type of Outcome: *Deliverable Planning Diagram Dx.1-Dx.*n
Recipient: QM (XXX)
Who responsible to transmit: Work Package Leader WPx
When to be sent: within 20 days after start of work

D: Type of Input: *Special Risk Identification Template (SRIT)*
Provided by: Quality Management (XXX)
By when: August 2012 (WP-specific documents sent asap for those deliverables already started, others on demand)
Recipient: Work Package Leader WPx

A02: Activity: *Identify Special (Task-related) Risk Factors for Tx.1-Tx.n*
Template to be used: SRIT
Who responsible to complete: Work Package Leader WPx, involve Task Leaders Tx.1-Tx.n
When to be completed: At the beginning of work on a deliverable (WP)

II: Type of Outcome: *Special Risk Identification Tables for Tx.1-Tx.n*
Recipient: QM (XXX)
Who responsible to transmit: Work Package Leader WPx
When to be sent: within 20 days after start of work

E: Type of Input: *Special Risk Identification Tables (Tx.1-Tx.n) & Deliverable Planning Diagram (Dx.1-Dx.n)*
Provided by: Work Package Leader WPx
By when: (already started Ds): September 2012 (all)**:**(20 days after start/reception of individualized template)
Recipient: QM

Example for several inputs from different sources as accumulated precondition of one activity

A: Type of Input: *Deliverable Planning Template*
Provided by: Quality Management (XXX)
By when: August 2012 (WP-specific documents sent asap for those deliverables already started, others on demand)
Recipient: Work Package Leader WPx

B: Type of Input: *DoW*
Provided by: Coordinator XXX)
By when: April 2012
Recipient: All

C: Type of Input: *Deliverable Relationship Matrix (DRM)*
Provided by: Quality Management (XXX)
By when: July/Augsust 2012
Recipient: All

A01: Activity: *Proceed Deliverable Planning Dx.1-n*
Template to be used: Deliverable Planning Template
Who responsible to complete: Work Package Leader WPx, involve Task Leaders Tx.1-Tx.n
When to be completed: At the beginning of work on a deliverable (WP)

Example for several outcomes from different sources jointly forming the future input for activity

V: Type of Outcome: *Notification on fin. SRAQ Tx.1*
Recipient: Work Package Leader WPx
Who responsible to transmit: Task Leader Tx.1

...

VI: Type of Outcome: *Notification on fin. SRAQ Tx.n*
Recipient: Work Package Leader WPx
Who responsible to transmit: Task Leader Tx.n

VII: Type of Outcome: *Notification on overally completed SRAQ (Tx.1-Tx.n) and DPM (Dx.1-Dx.n)*
Recipient: UDE (thomas.richter@icb.uni-due.de)
Who responsible to transmit: Work Package Leader WPx

Example for several activities jointly forming an output

I: Type of Input: *Completed DPM Dx.1-Dx.n from Work Package Leader WPx*
Provided by: (automatically online, notification by Work Package Leader WPx)
By when: asap after completion, latest 1 week after link sent out by UDE
Recipient: XXX

A07: Activity: *Evaluate Results DPM/ WPx*
Data to be used: Data from Online Questionnaire
Who responsible to complete: XXX
When to be completed: asap (after notification)

A08: Activity: *Report on Progress & Risk Status WPx*
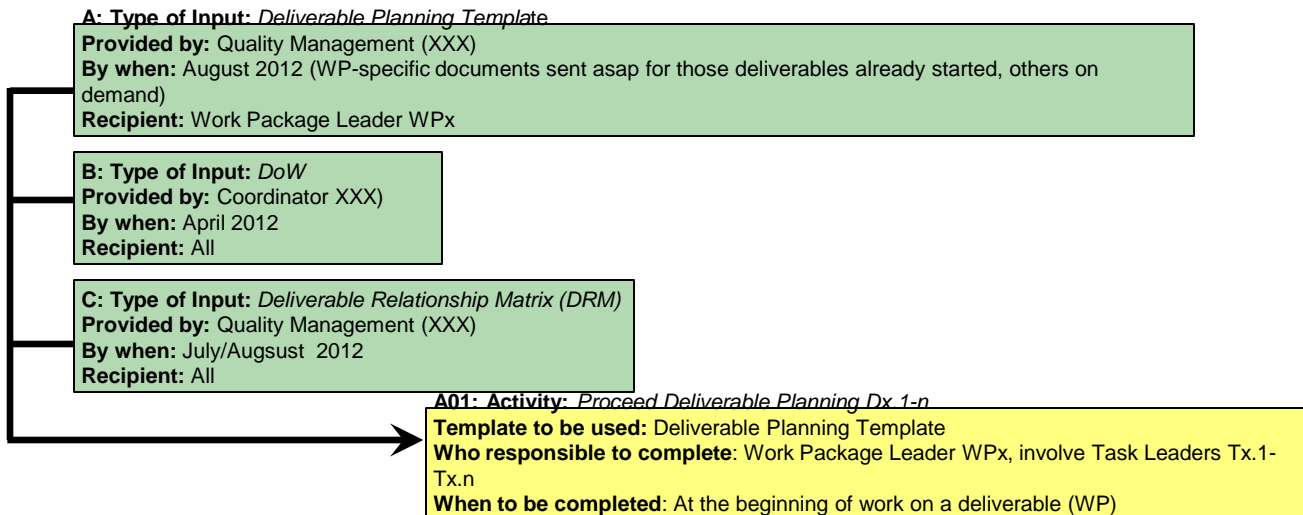**Input to be used:** Results from Activity 1
Who responsible to complete: XXX
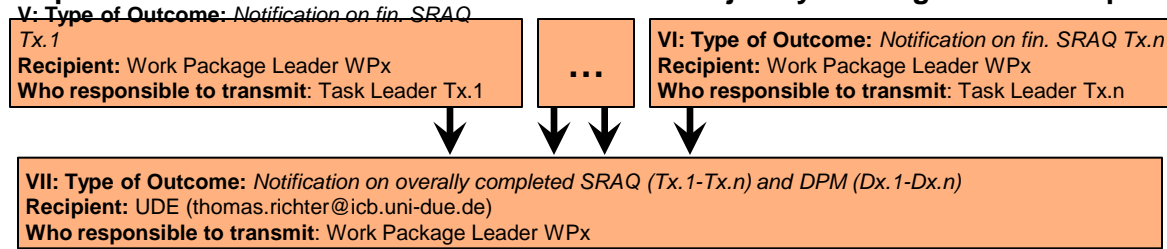**When to be completed:** within 7 days after data reception

VIII:Type of Outcome: *Report on Results of current progress & risk status WPx*
Recipient: Coordinator, Cluster- & Work Package Leader WPx
Who responsible to transmit: XXX
When to be sent: within 7 days after SRAQ/DPM notified as completed

Loop and if-conditions shown at the example of a standard (internal) review process

A: Type of Input: *Deliverable Dx.y in review-ready (Pre-final) Version*
Provided by: Work Package Leader WPx
By when: latest 1 month before official (DoW) delivery date
Recipient: 2 external reviewers

A01: Activity: *Final Review of Dx.y*
Input to be used: *review-ready version of Dx.y*
Who responsible to complete: 2 external reviewers
Activity starts: asap after review versions are delivered
When to be completed: within 2 weeks

I: Type of Outcome: *Review Report Dx.y*
Needed for: Final version Dx.y
Recipient: Work Package leader WPx, Coordinator, QM team
Who responsible to transmit: 2 external reviewers

The following activity is case-sensitive, depending of the review results

| (1) no changes required required | (2) minor changes required | (3) major changes |

B: Type of Input: *Review Report Dx.y*
Provided by: 2 external reviewers
By when: asap after review is completed, latest 2 weeks after review version has been received
Recipient: Work Package leader WPx, Coordinator, QM team

If review result was (1) no changes required

A02a: Activity: *Rename Dx.y to final version and deliver to coordinator*
Who responsible to complete: Work Package leader WPx
When to be completed: asap, latest within 2 weeks (official delivery date (DoW)

IIa: Type of Outcome: *Final Version Dx.y*
Recipient: Coordinator
Who responsible to transmit: Work Package leader WPx

If review result was (2) minor changes required

A02b: Activity: *implement recommended changes, rename Dx.y to final version and deliver to coordinator*
Who responsible to complete: Work Package leader WPx
When to be completed: asap, latest within 2 weeks (official delivery date (DoW)

IIa: Type of Outcome: *Final Version Dx.y*
Recipient: Coordinator
Who responsible to transmit: Work Package leader WPx

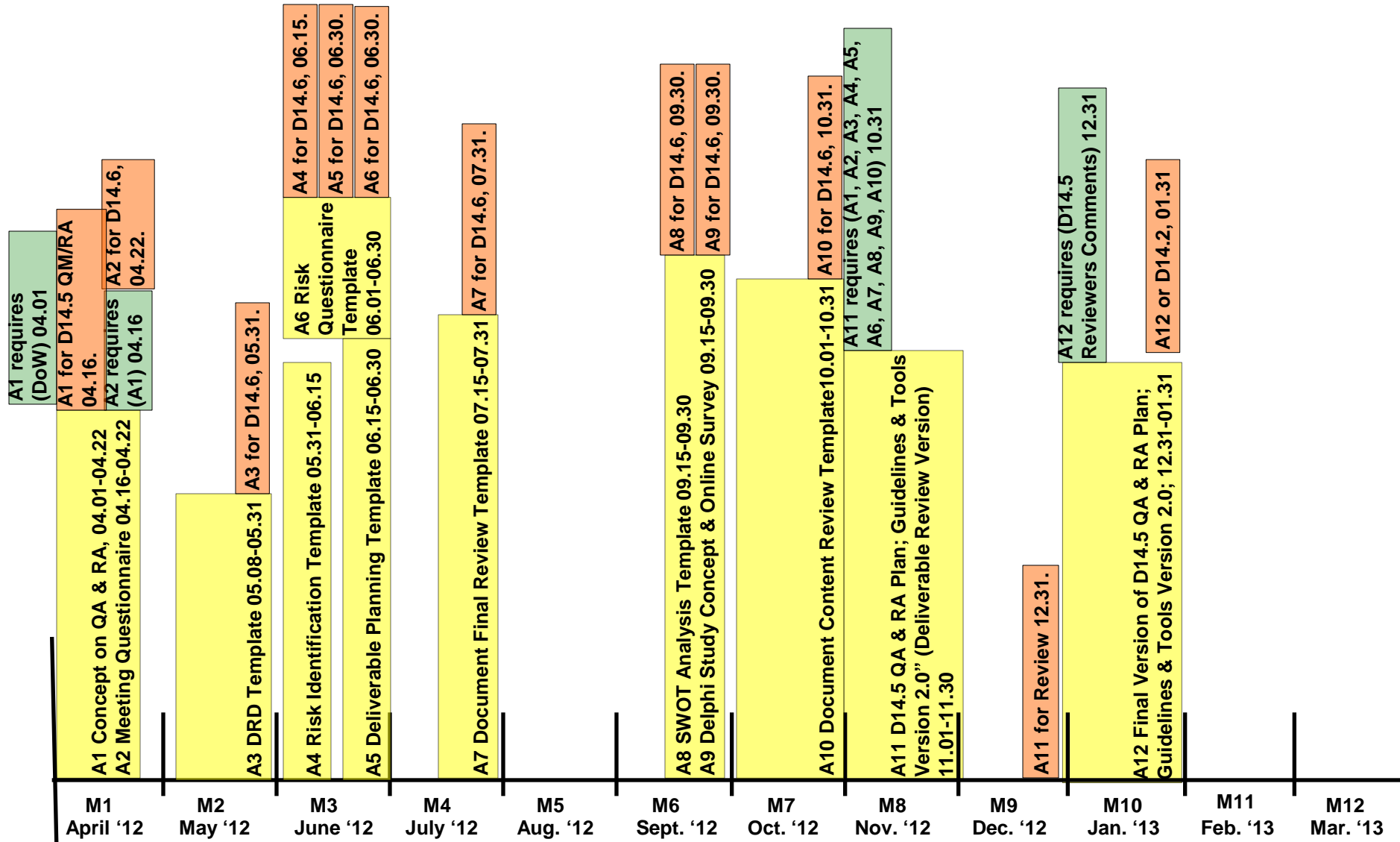**If review result was (3) major changes required**

A02b: Activity: *implement recommended changes, rename Dx.y to final version and deliver to coordinator*
Who responsible to complete: Work Package leader WPx
When to be completed: asap, latest within 2 weeks (official delivery date (DoW)

Further steps and decisions are required and not determinable at this point!

To be considered: Are the Work Package leader WPx and related partners able to deliver the final version in time; (2 weeks)? To which extent is support by others required; who can do it? Do follow-up steps need to be shifted in schedule (dependencies)? Does the EC need to be informed (amendment)? Does the Work Package leader WPx or a partner need to be substituted? further …

In all decisions, the QM team (informative) shall be involved. The full final review process is to be repeated after the major changes have been implemented.

Deliverable (Process) Planning in a nutshell using the example of QM/RA activities in ODS (1. year)

Legend:
- Yellow: Activities within the WP/Deliverable/Task
- Green: Input required for own work within the task/deliverable (required from other partners)
- Orange: Output from own task/deliverable for other tasks/deliverables (required by other partners)

Timeline (Month / Date):
- M1 April '12
- M2 May '12
- M3 June '12
- M4 July '12
- M5 Aug. '12
- M6 Sept. '12
- M7 Oct. '12
- M8 Nov. '12
- M9 Dec. '12
- M10 Jan. '13
- M11 Feb. '13
- M12 Mar. '13

Activities:
- A1 requires (DoW) 04.01
- A1 for D14.5 QM/RA 04.16.
- A2 requires (A1) 04.16
- A2 for D14.6, 04.22.
- A1 Concept on QA & RA, 04.01–04.22
- A2 Meeting Questionnaire 04.16–04.22
- A3 DRD Template 05.08–05.31
- A3 for D14.6, 05.31.
- A4 for D14.6, 06.15.
- A5 for D14.6, 06.30.
- A6 for D14.6, 06.30.
- A6 Risk Questionnaire Template 06.01–06.30
- A4 Risk Identification Template 05.31–06.15
- A5 Deliverable Planning Template 06.15–06.30
- A7 for D14.6, 07.31.
- A7 Document Final Review Template 07.15–07.31
- A8 for D14.6, 09.30.
- A9 for D14.6, 09.30.
- A8 SWOT Analysis Template 09.15–09.30
- A9 Delphi Study Concept & Online Survey 09.15–09.30
- A10 for D14.6, 10.31.
- A11 requires (A1, A2, A3, A4, A5, A6, A7, A8, A9, A10) 10.31
- A10 Document Content Review Template 10.01–10.31
- A11 D14.5 QA & RA Plan; Guidelines & Tools Version 2.0" (Deliverable Review Version) 11.01–11.30
- A11 for Review 12.31.
- A12 requires (D14.5 Reviewers Comments) 12.31
- A12 or D14.2, 01.31
- A12 Final Version of D14.5 QA & RA Plan; Guidelines & Tools Version 2.0; 12.31–01.31