HowTo: Reporting in Initialisation

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Purpose of this document

This document provides some additional guidance on the reporting that should be done during and by the end of the service initialisation phase. It complements the more formal Requirements for Completion of Initialisation Phase and focuses on how to actually create the reports.

Documentation: What and where

During the initialisation phase you will need to report your progress twice: Once in the application for the next phase, service integration, and once as a final report[1] when you are at the end of the initialisation phase. Both reports will be based on the same tracking of your progress in OpenProject (OP), which should be continuously updated to reflect the current status of your service. Details on this will be explained in the next section, but the OP workspace will be provided to you and already contain the relevant work packages for each of the TA 1 deliverables relevant to your service.

For the integration application, which is due after about six months in initialisation, the integration template requires a description of the current status for each of the TA 1 deliverables. You should therefore export the current status of the deliverables D1.4.1-5 from OP and attach them to the proposal, as background information for the reviewers. In the proposal itself the service can then be described briefly on a meta-level: What is the current state of the service, how far has it come and what are the key points you have achieved? For all further explanations you can then refer to the detailed exported OP report in the appendix of the proposal.

In addition a final report for all TA1 deliverables is required to formally complete the initialisation. The integration phase can be started independently if it is funded. With a sufficiently up-to-date OP, this will reduce itself to mark the corresponding tasks in the OP as completed.

In summary you should document:

OpenProject	Integration Proposal
Tangible results, work in progress, **detailed** progress of tasks, next steps and documentation (all either directly in OP, or linked to an external resource / Zenodo)	High-level overview of the status of the service as stated in the template, **key points** you achieved so far and outlook on what you expect to get done by the end of initialisation

[1] Technically, D1.4.1 to D1.4.3 are a report and for D1.4.4+5 documentation on what was done is required, but for the scope of this document this leads to the exact same tasks and is synonymous.

OpenProject Reporting

Reporting in OpenProject takes place inside the work packages (alias tasks, alias tickets) in your service workspace. For each deliverable, a corresponding work package will be provided right at the start of your initialisation phase. Figure 1 shows an example of how that might look. It might be useful to map your own Milestones/Deliverables/Work Packages to these ones, so you know which work will go into which part of the report right from the start. The best way to do so would be to link the OP work packages together. For this, open a work package and select the 'Relations' tab on the right. There you can 'create a new relation' and select your already existing work packages, linking them to the work package you are editing. Additionally these relations can also be put into the description field, so they appear in an export.

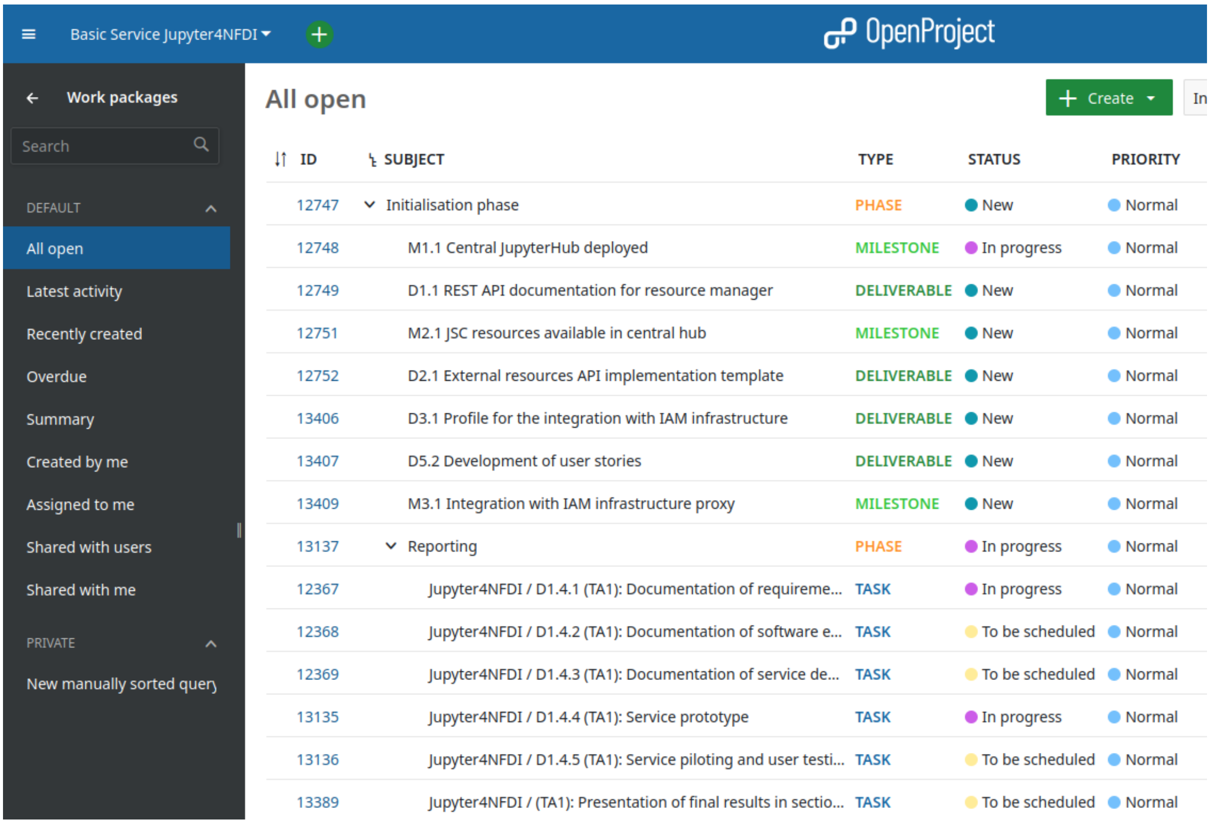

Figure 1: Example view of the work packages for deliverables in initialisation phase. Note the project-specific tasks are underneath the 'Initialisation phase' phase (D1-D5) and the TA 1 deliverables are grouped separately under 'Reporting'.

For each work package you can track status, priority, assignee and percent of completion. The most important thing for the reports is the description field though, where you describe your progress and results. A detailed explanation on the actual items that should be documented there can be found in the aforementioned [Requirements for Completion](). Each work packages' description is also pre-filled with the respective section from these requirements. For example, the work package for D1.4.1 should look similar to what is shown in Figure 2. The description field is the free text field at the top

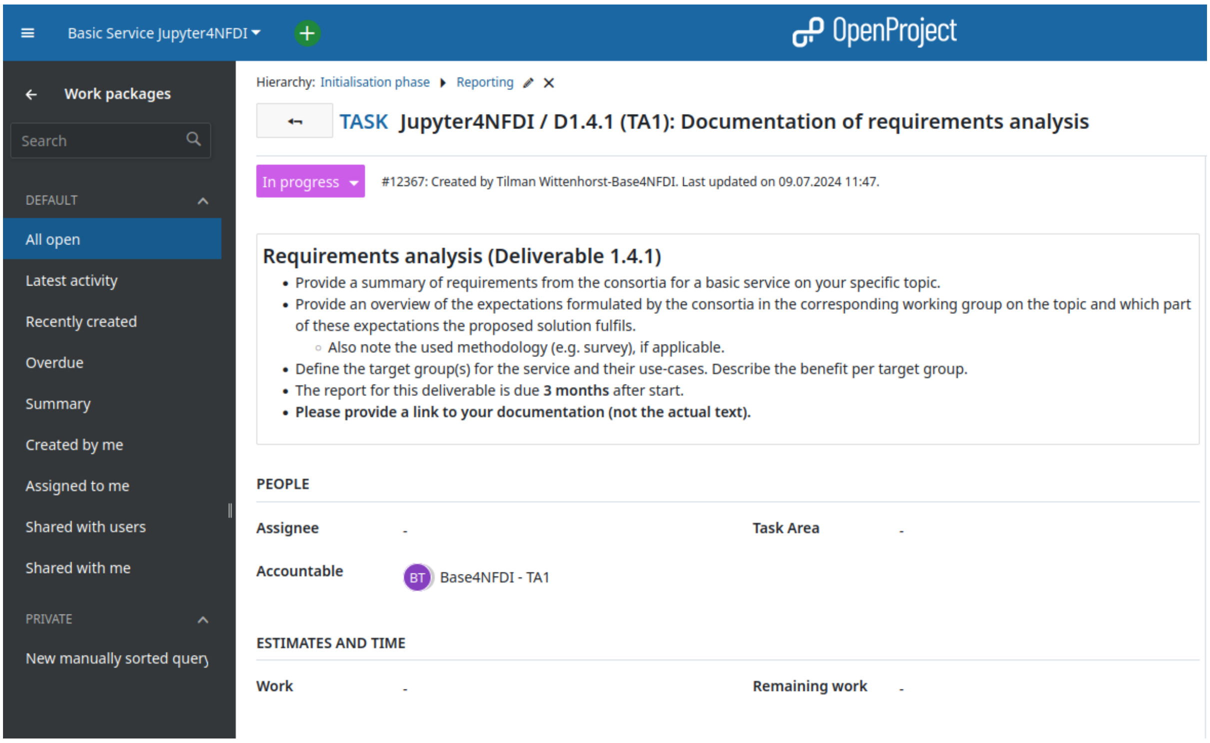

Figure 2: Example view of the work package for the TA 1 deliverable D1.4.1. The description field is pre-filled with guidance on which kind of content should be provided, taken from the Requirements for Completion, where they can also be looked up at any time (if you choose to delete them here).

of the work package and its text can just be replaced by your actual contents including e.g. visualisations. If you have documentation or results published at an external place (e.g. Zenodo), please link it here (there is no need to copy anything of it verbatim). When everything is ready, you can export the report.

Additional Considerations

When looking at these deliverables, you might notice that you may already have done some or even much work in these areas for the proposal to start the initialisation phase. You are free to re-use as much of that as you like here! The reports are there to ensure that each aspect is considered in sufficient depth and in a standardised way during the initialisation, and also to provide a chance to revisit your initial findings and thoughts, and to harmonise, adjust, back them up with additional data, and in the best case, publish them, e.g. on Zenodo.

Furthermore, not every deliverable might be phrased in a way that fits perfectly to the goals of your service, especially if you're not developing software yourself (yet). The idea for reporting then is, to interpret the deliverables in a most meaningful way. For example, if you use an existing software solution, in D1.4.3 you should describe how you will operate this service inside Base4NFDI and how you will adapt it to the NFDI community.

For any remaining questions, please have a look at the Requirements for Completion of Initialisation Phase and reach out to the TA 1 team or your service steward!