www.ep-ad.org

European Prevention of Alzheimer's Dementia Consortium

Grant Agreement nº115736

D5.1 Restricted Website and Tools for Internal Collaboration and Communication

WP5 – Project Management

V2.0

Final

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DOCUMENT INFORMATION

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Key words	Restricted website, document sharing, internal collaboration space, security access

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Lennert Steukers	03/02/2015	1.0	First draft
Laurence Mazuranok, José-Luis Molinuevo, Serge Van der Geyten, Ami Saver	04/02/2015	1.1	Internal review

[1] If "Other" type of dissemination level, please inform the PMO team (mgt@ep-ad.org) accordingly.

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Sandra Pla, Carlos Diaz	09/02/2015	1.2	Internal Review
Lennert Steukers	16/02/2015	1.3	Final Draft
ExCom	20/02/2015	1.4	Review and comments
Lennert Steukers	23/02/2015	2.0	Final version

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DEFINITIONS[2]

- Partners of the EPAD Consortium are referred to herein according to the following codes:
  - **Janssen**. Janssen Pharmaceutica NV (Belgium)
  - **UEDIN**. The University of Edinburgh (United Kingdom)
  - **UOXF.** Masters and Scholars of the University of Oxford (United Kingdom)
  - **BBRC.** Barcelonabeta Brain Research Center (Spain)
  - **SYNAPSE.** Synapse Research Management Partners S.L (Spain)
  - **KI.** Karolinska Institutet (Sweden)
  - **VU-VUMC.** Stichting VU-VUmc (Netherlands)
  - **UCAM.** Masters and Scholars of the University of Cambridge (United Kingdom)
  - **MRC.** Medical Research Council (United Kingdom)
  - **BERRY.** Berry Consultants LLP (United Kingdom)
  - **UNIGE.** Université de Genève (Switzerland)
  - **RUMC.** Stichting Katholieke Universiteit (Netherlands)
  - **CU.** Cardiff University (United Kingdom)
  - **CHUT.** Centre Hospitalier Universitaire de Toulouse (France)
  - **QUINTILES.** Quintiles, Ltd (United Kingdom)
  - **AE.** Alzheimer Europe (Luxemburg)
  - **EMC.** Erasmus Universitair Medisch Centrum Rotterdam (Netherlands)
  - **APHP.** Hôpital de la Salpêtrière (France)
  - **INSERM.** Institut National de la Santé et de la Recherche Médicale (France)
  - **ULEIC.** University of Leicester (United Kingdom)
  - **IXICO.** IXICO Technologies Ltd (United Kingdom)
  - **ARACLON.** Araclon Biotech S.L (Spain)
  - **FRAUNHOFER.** Fraunhofer-Gesellschaft zur Förderung der angewandten Forschung e.V. (Germany)
  - **Eisai.** Eisai Inc (United States)
  - **SARD.** Sanofi-Aventis Recherche & Développement (France)
  - **NOV.** Novartis Pharma AG (Switzerland)
  - **BI.** Boehriger Ingelheim International GmbH (Germany)
  - **Eli Lilly.** Eli Lilly and Company Ltd (United Kingdom)
  - **HLU.** H. Lundbeck A/S (Denmark)
  - **Takeda EU.** Takeda Development Centre Europe Ltd (United Kingdom)
  - **AC Immune.** AC Immune SA (Switzerland)
  - **Biogen**. Biogen Idec, Inc (United States)
  - **Amgen.** Amgen NV (Belgium)
  - **Pfizer.** Pfizer Limited (United Kingdom)
  - **UCB.** UCB Biopharma SPRL (Belgium)
- **Grant Agreement.** The agreement signed between the beneficiaries and the IMI JU for the undertaking of the EPAD project (Grant Agreement n° 115736).

[2] To be completed with terms and abbreviations related to the actual content of the document

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- **Project.** The sum of all activities carried out in the framework of the Grant Agreement.
- **Topic**. The sum of all activities carried out in the framework of either the EPAD Project.
- **Work plan.** Schedule of tasks, deliverables, efforts, dates and responsibilities corresponding to the work to be carried out, as specified in Annex I to the Grant Agreement.
- **Consortium.** The EPAD Consortium, comprising the above-mentioned legal entities.
- **Project Agreement.** Agreement concluded amongst EPAD participants for the implementation of the Grant Agreement.
- **ExCom.** Executive Committee
- **PMO.** Project Management Office

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EXECUTIVE SUMMARY[3]

Internal communication, especially in large, complex projects, is one of the key drivers of engagement in the Project for consortium members and is proven to add significant value to organizations on all metrics. The size and mixed nature of the EPAD consortium (pharmaceutical companies, SMEs, academia, research service providers and a patient organization) provides a complex environment where special attention must be given to the internal communication in order to ensure an optimal flow of information and efficient operating procedures. For that reason, establishing specific collaboration tools for the management of the consortium and the knowledge produced by the Project was one of the priorities in the first stages of the project. Firstly, this deliverable document reports on the establishment of an internal collaboration space/platform, called EPAD TeamworkPM, for the EPAD consortium. This tool greatly enhances collaborative work across the Consortium by providing a well-structured file repository/library, an integrated calendar, a forum space and much more. Secondly, a web-based needs assessments approach is explained that will be performed during the initial phase of the Project's lifespan with the primary goal of gaining the Consortiums' input on how the internal collaboration platform can be modified/adapted according to the evolving Projects' needs. Finally, expansion opportunities to improve and extend the current platform are described.

Keywords:

[3] Maximum 2,000 characters (including spaces).

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1. INTRODUCTION

Public-Private Partnerships (PPPs) are organized along a continuum between public and private nodes. A challenge lies in finding a good balance in the different interests/expectations of all stakeholders involved while reaching the ultimate objectives in a timely and cost-efficient manner. It is at the merger of these sectors that we see how a unified partnership has immediate innovative impact. One of the key drivers in big PPPs like the EPAD Project is effective communication and work dynamics between Participants to help drive the whole Consortium as a team towards successful completion of the Project.

In EPAD we value trust and we believe that in order to maintain a long-term relationship between partners creating transparency through open and efficient communication is a must. Hence, developing a portal allowing efficient internal information and communication exchange among Participants is one of our priority deliverables during the Project initiation phase.

WP5 – Project Management in collaboration with the EPAD Project Management Office (PMO) has been in charge of assessing several options for internal communication tooling. Re-envisioning rather than re-inventing the wheel, selection of the initial platform benefitted from the experience acquired by Participants in other PPPs, including other IMI projects such as the European Medical Information Framework (EMIF) (see for example D16.1 of the EMIF project). Although the initial platform serves the current needs of the consortium, WP5 is wary of the fact that adaptable methodologies to meet evolving project needs are crucial. Therefore, WP5 through the EPAD PMO is committed to assess the needs/requirements for the platform for future use in EPAD and make the necessary adaptations where needed.

The present document describes the initial efforts undertaken within EPAD to provide internal communication tools, including the launch of the EPAD TeamworkPM platform, as a restricted website for internal communication purposes. In addition, an overview is provided of the different features of this tool. Furthermore, a layout of the approach for assessing the Consortium's needs and a summary of a potential extension of the platform via additional features and tools are described.

2. Initial tooling: EPAD mailing lists and EPAD SharePoint

Exploration of internal collaboration platforms was initiated before the project start. Previous experience and especially assessments carried out for previous large and complex projects (e.g. EMIF) were leveraged. The emphasis here was on quickly providing the Consortium with tools that would be immediately usable, have a minimum learning curve and help propel efforts through a typical initial 'storming' phase towards a 'norming' phase as soon as possible.

During the proposal stages, web domains for EPAD were registered and mailing lists were created for streamlining internal communication. These have been quickly put to use by Participants and have been ever-expanding during the project launch. At the time of writing this deliverable, the following lists are active:

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List	Description
all@ep-ad.org	All EPAD partners
exec@ep-ad.org	Executive Committee members
mgt@ep-ad.org	Project Management office members
Legal@ep-ad.org	Legal contacts for the EPAD participants
doc@ep-ad.org	Data Oversight Committee members
national-leads@ep-ad.org	EPAD National Leads
sc@ep-ad.org	Steering Committee members
sc1@ep-ad.org	Steering Committee members – Project 1st half
sc2@ep-ad.org	Steering Committee members – Project 2nd half
aetionomy@ep-ad.org	Ad-hoc team for the EPAD- Aetionomy alignment
regulatory@ep-ad.org	EPAD Regulatory Working Group members
wp-lead@ep-ad.org	EPAD Work Package Leaders
wp1@ep-ad.org	Work Package 1 Participants
wp2@ep-ad.org	Work Package 2 Participants
wp3@ep-ad.org	Work Package 3 Participants
wp4@ep-ad.org	Work Package 4 Participants
wp5@ep-ad.org	Work Package 5 Participants
wp6@ep-ad.org	Work Package 6 Participants
wp7@ep-ad.org	Work Package 7 Participants
wp8@ep-ad.org	Work Package 8 Participants

Mailing lists are managed by the PMO. Membership is updated upon demand, and can be consulted from the internal site. New lists are created upon suggestion by Participants, if approved at the PMO level. Lists are eliminated when deemed irrelevant or obsolete by the PMO.

After the Kick-off meeting on January 14th & 15th 2015, the EPAD PMO faced an urgent need to share several materials presented during that meeting within the EPAD consortium. Since a final decision on internal platform had not been made yet, a Microsoft SharePoint platform was used as a temporary platform.

SharePoint is a web application framework which integrates intranet, content management, and document management. Access to this service for the EPAD project was provided by Participant 5. SYNAPSE since they have a license available for internal use in their organisation. All Participants were invited to access to this platform through a unique username and password (see Figure 1).

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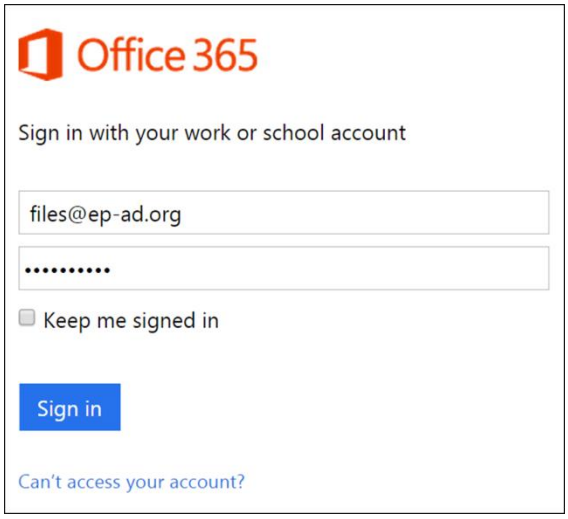

Figure.1 Screenshot of the login page of SharePoint

After logging in, Participants were able to access to the shared files, which included all the materials of the Kick-off meeting (see Figure 2). Uploading documents was managed by Participant 5. SYNAPSE but each EPAD member could view, get and print documents without downloading or installing any software.

Figure.2 Dashboard overview

Although detailed instructions were sent to the EPAD Consortium explaining the whole process to access this platform, some Participants had difficulties to log in when having existing Microsoft accounts. For that reason, this option was discarded as long term solution for use in the project.

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3. EPAD TeamworkPM

During the preparation and negotiation stages of the grant, the EPAD ExCom and EPAD PMO faced an urgent need for an online document exchange platform (e.g., working version of Full Project Proposal, Description of Work & Project Agreement, meeting presentations & materials, meeting minutes, contact lists, dissemination material, guidelines, templates, etc.). Based on feedback from Participants in the Consortium on their experiences with collaboration tools in other projects (e.g. EMIF), we decided to create a first version of an EPAD document exchange platform using the TeamworkPM software (see Figure 3).

TeamworkPM is an easy-to-use online teamwork & project management software application that helps managers and collaborators work together more productively online. TeamworkPM is simple and flexible, has good file storage capabilities, and allows the use of tasks and milestones for specific working groups. In addition, TeamworkPM includes excellent customer support services. Most importantly, a license was available from the Project Co-ordinator, Participant 1. JPNV. It was also the platform chosen for the EMIF project after an assessment of comparable options (see EMIF deliverable D16.1). As a consequence, it was decided by the PMO & WP5 that the initial internal collaboration platform for EPAD would also be TeamworkPM, subject to further exploration of the Consortium needs and evaluation of the platform in order to fine-tune functionality and provide for additional tooling, as needed.

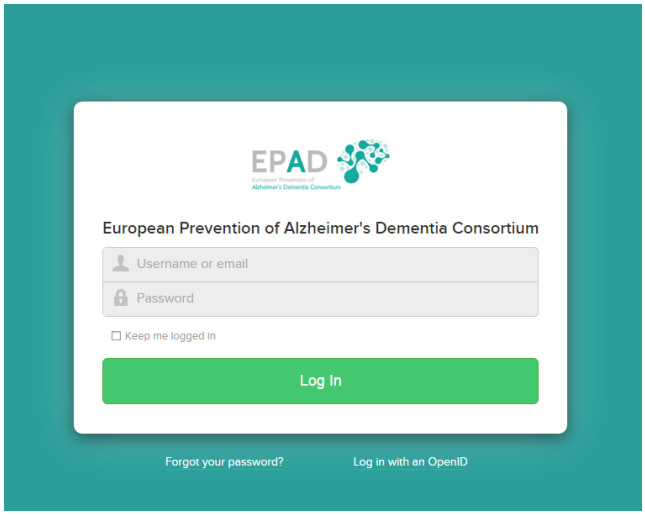

Figure.3 Login screen EPAD TeamworkPM

3.1. Major features of use to EPAD

- **Project Management**

  Upon entering after login, each user receives a quick dashboard overview of the recent activity happening in the platform, going from new files that have been uploaded to upcoming milestones and events. In conclusion, this activity stream keeps Participants up to date with the progress of the Project (see Figure 4).

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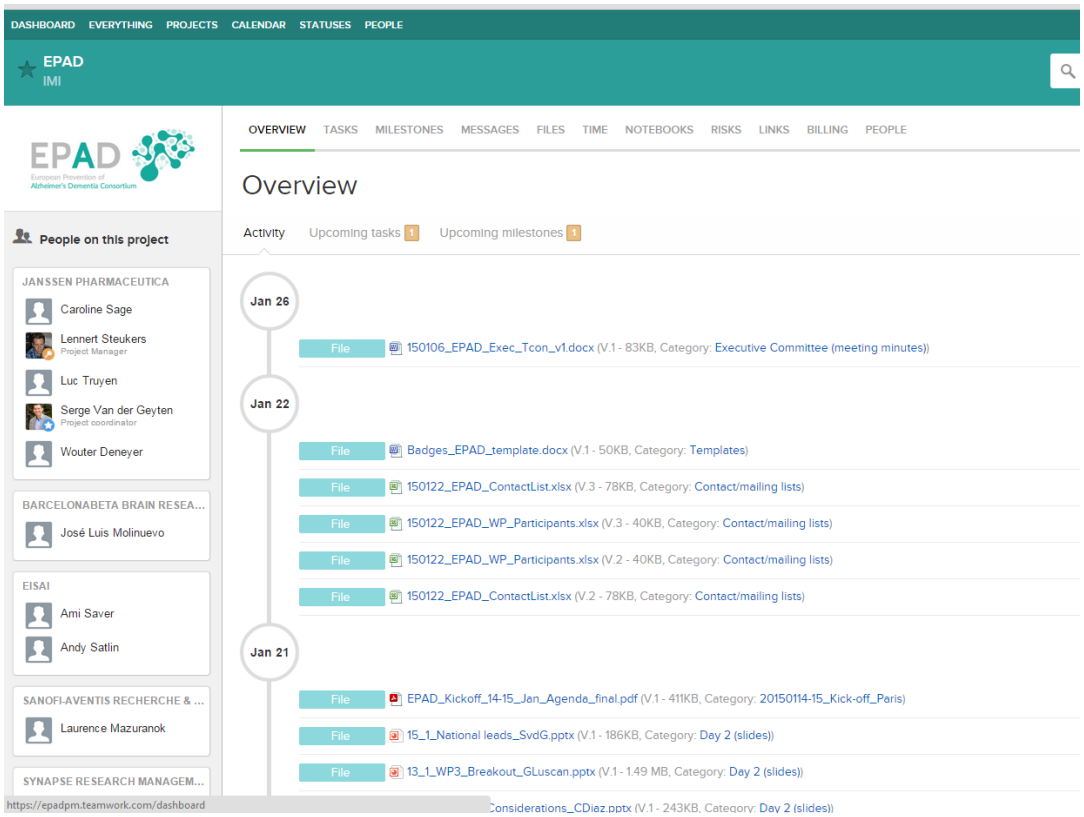

Figure.4 Dashboard overview

- **File management**

  The file section of the TeamworkPM site serves as a very practical document repository where all project-related files are stored in a structured manner. We have created several subfolders to facilitate searching for and retrieving specific documents (see Figure 5 and 6).

  TeamworkPM also includes features that specifically benefit EPAD's Project Managers, including:

  - Uploading multiple files simultaneously
  - Restricting specific files for their pre-identified audience and the ability to mark as private
  - A user notification system (e.g., for newly uploaded files)
  - Document version control so only the most recent version is shown (all document versions remain available)
  - Integration with both Dropbox and Google Docs

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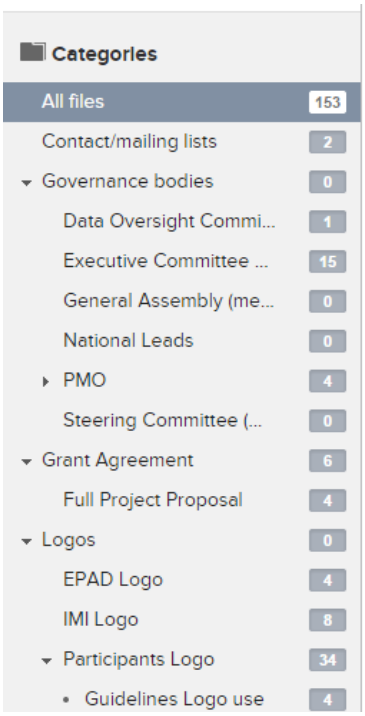

Figure.5 Folders

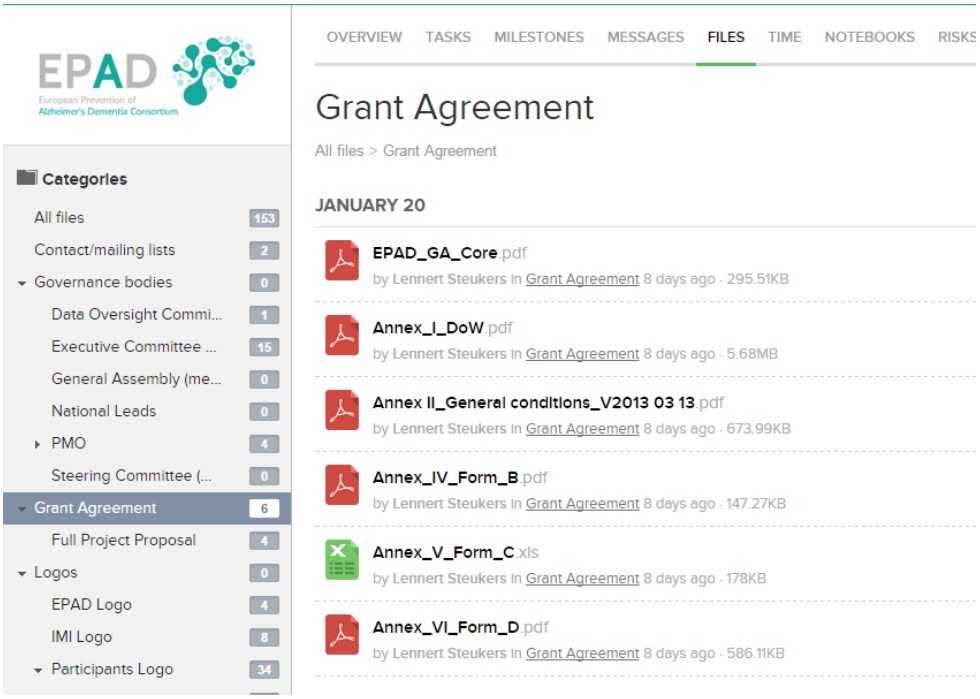

Figure.6 Core documents available for the Consortium on EPAD TeamworkPM

- **Multiple language support**

  One of the key Project Objectives of EPAD is to develop a sustainable, pan-European scientific, analytical and adaptive trial delivery machine focused on undertaking Proof-of–Concept trials for the prevention of Alzheimer's dementia. Moreover, EPAD will be the European pillar of a global program called GAP (Global Prevention of Alzheimer's Dementia). To facilitate global usage of the communication platform, make life easier for the many international stakeholders involved; the EPAD TeamworkPM application will display all text labels/tabs throughout the application in the Participants' preferred language.

- **Apple App/Android App**

  Whether you're in a coffee shop, on a train or in a meeting, you're never more than a couple of swipes away from the information you need (see Figure 7). Especially practical when you are attending one of the EPAD meetings and want to consult one of the slide decks used in previous meetings.

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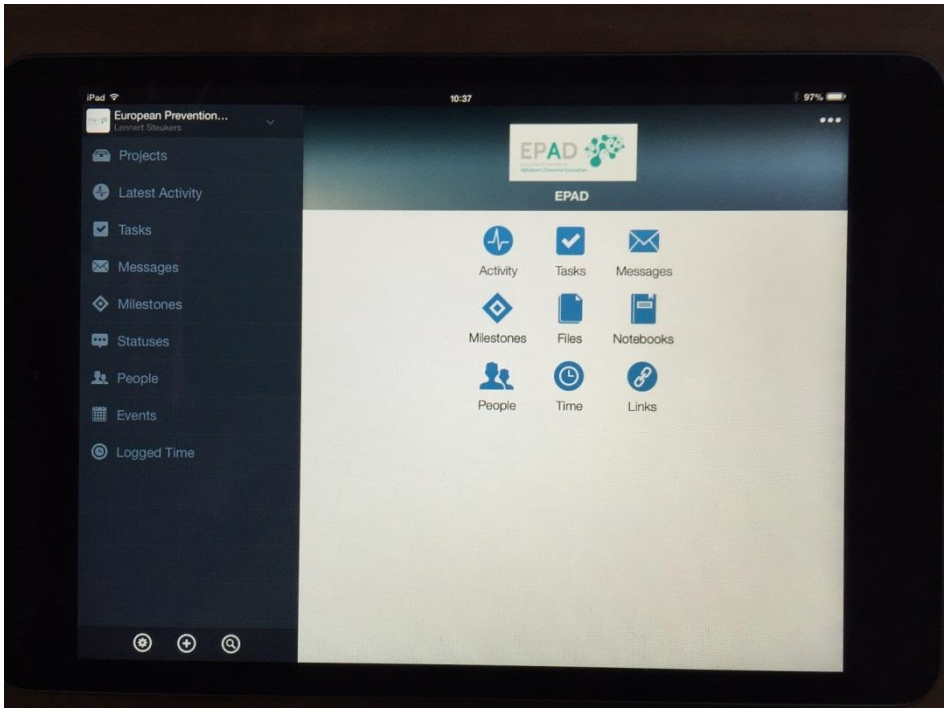

Figure.7 Snapshot of the EPAD TeamworkPM App on an Apple IPAD

- **Project messages/forum**

  Messages in TeamworkPM are the perfect way to promote participation and centralize communication. Any Participant can start a discussion thread on any matter related to the Project. Messages can be assigned as either public (available to any partner having access to the specific section) or private (i.e., email-like) and have a full set of editing options (e.g., file upload, emoticons, enriched text, pictures, etc.) that benefit the interaction between Participants. In addition, Participants can be notified of new messages on the EPAD TeamworkPM platform and their email replies will be automatically added to the message board.

- **Project calendar**

  A useful feature for keeping all the Consortium members up-to-date about the forthcoming meetings, teleconferences and events related to EPAD. In addition, global conferences/workshops relevant to EPAD are included. Milestones and deadlines that are relevant for the project can also be included.

3.2. Additional features

- **Task management**

  Tasks can be associated with dates, people, milestones, and of course projects. Although we are still exploring whether we will actually use this feature, offered by TeamworkPM, this tool may especially benefit small group of partners e.g. the EPAD PMO or specific task forces/working groups to interact very efficiently with short timelines.

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- **Email integration**

  This feature of TeamworkPM offers the opportunity to receive up-to-the-minute status reports, alerts and reminders. If users decide to enable this feature they will be able to get alerts and notifications via email, e.g. each time there is a new comment to a message or a new file is uploaded. The email alert system can be customized depending on the desired periodicity of update. Messages can be replied to and such replies are automatically included in the corresponding message board.

In conclusion, implementation of the basic functionality of the TeamworkPM tool has resulted in an efficient way (easy user/password login) for users to have a first internal collaboration platform available for the project. The site is managed and controlled by both Janssen and Synapse Project Managers.

4. Evaluation and Needs Assessment

While the EPAD TeamworkPM platform is currently in use by the Consortium, the EPAD PMO together with WP5 stays committed to constantly adapting project management methodologies to meet the Consortiums' needs and will explore how best to optimize the current internal collaboration tools, in case this would be required based on consortium feedback. During the next few months, we will develop and perform evaluation activities, including a professionally-written web-based survey (see Figure 8). The survey will include a pre-set list of questions to be answered with the specific goal of evaluating the suitability of the current TeamworkPM platform and gaining input about possible needs currently not covered by the platform. Another indirect benefit of performing such a survey is getting people involved in the process, thereby promoting the awareness and use of the platform. Before distributing to the wider consortium, we will the Work Package Leaders, Scientific Advisory Group Leaders & Working Group Leaders. The results of the survey and other evaluation activities will guide future action.

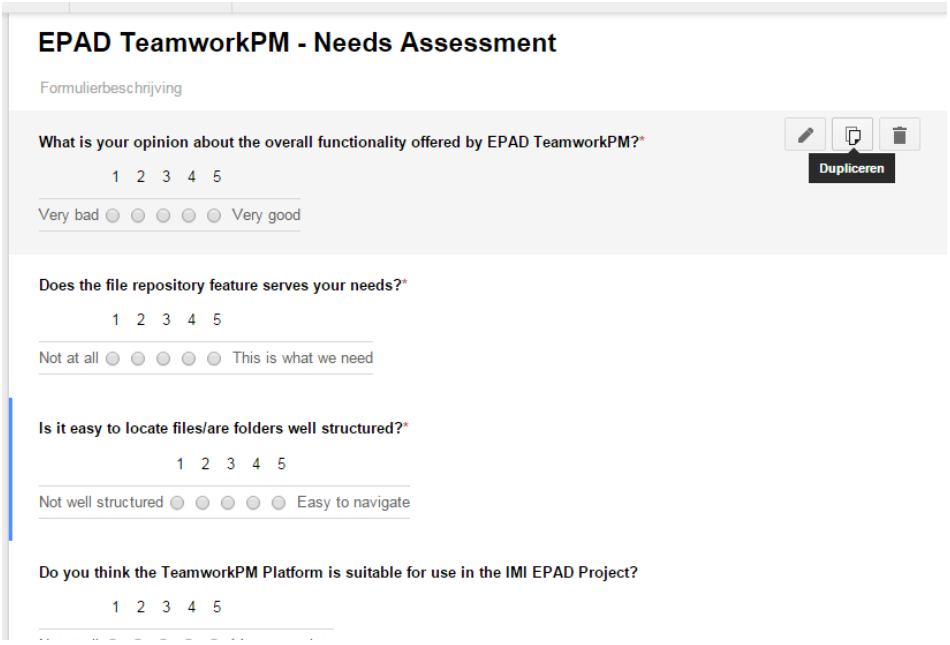

Figure.8 Web-based Needs Assessment Survey about the EPAD Internal Collaboration Tool

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5. Expansion Opportunities

One of the potential expansion opportunities that the EPAD PMO & WP5 are currently exploring is the use of the SYNAPSE PI tool, kindly offered by Participant 5. SYNAPSE. The SYNASPE PI tool (for "Principal Investigator" but also for "Project Intelligence") is a web-based application specifically tailored to aid Project Coordinators and leadership on the follow up of complex collaborative research projects, by offering the information needed in the right format at the right time.

The tool follows the metaphor of business intelligence 'dashboards', and offers an easy to use graphical interface that displays key information and key performance indicators about the project (see Figure 9). Although the SYNAPSE PI tool does not yet have the capacity to serve a large community of users, the tool clearly offers potential as expansion to the current platform for use by the EPAD ExCom, Steering Committee and potentially Work Package Leads, especially considering that intensive use of TeamworkPM by the Consortium at large may create an enormous amount of files and discussion threads and may therefore make it hard to navigate by key decision-makers.

The purpose of Synapse-PI Dashboard is to present an overview of the project status - a single-screen portal where information is presented in the following modules:

- **Activity:** short messages (in a Twitter-like style) from the Project Manager(s) that provide an update on the most recent events of the project (i.e. deliverables submitted, teleconference minutes available, contact person changes for a partner, etc.).
- **Schedule:** simple chart showing the project overall time schedule, reporting periods and customised "milestones" (custom key events).
- **Metrics:** summary stats showing customised Key Performance Indicators of the project. This section can be tailored to each project. The default view shows basic consortium dynamics, including the number of emails sent, intranet access, number of teleconference meetings and dissemination activities by month.
- **Deliverables:** dynamic list of deliverables of the project, classified according to their status and deadline proximity.
- **Risks:** list of active risks, sorted by exposure and proximity in time, with one highlighted risk.
- **Financials:** one-click access to graphics showing resource (effort & budget) planning and consumption by WP, partner and reporting period.
- **Agenda:** list of forthcoming events of interest to be highlighted to the project leadership, such as upcoming teleconferences, consortium meetings, etc.
- **Publications:** list of scientific publications produced by the project, with links to the original source.
- **Team:** quick access to contact information of people involved in the project.
- **Documents**: one-click access to the frequently consulted documents, such as the Document of Work (DoW), Project Agreement (PA), deliverables, general project presentation, etc.

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Other tools are also being considered to support specific needs, such as Trello (www.trello.com) for task management, or Invision IP.Board (www.invisionpower.com) for comprehensive forum functionality. Selection of such tools will depend on the results of the evaluation and needs assessment exercise that will be undertaken in the following months. Due attention will be devoted to minimise overhead and steep learning curves for partners, maximise cost-efficiency, and coordination with external communication activities in WP6.

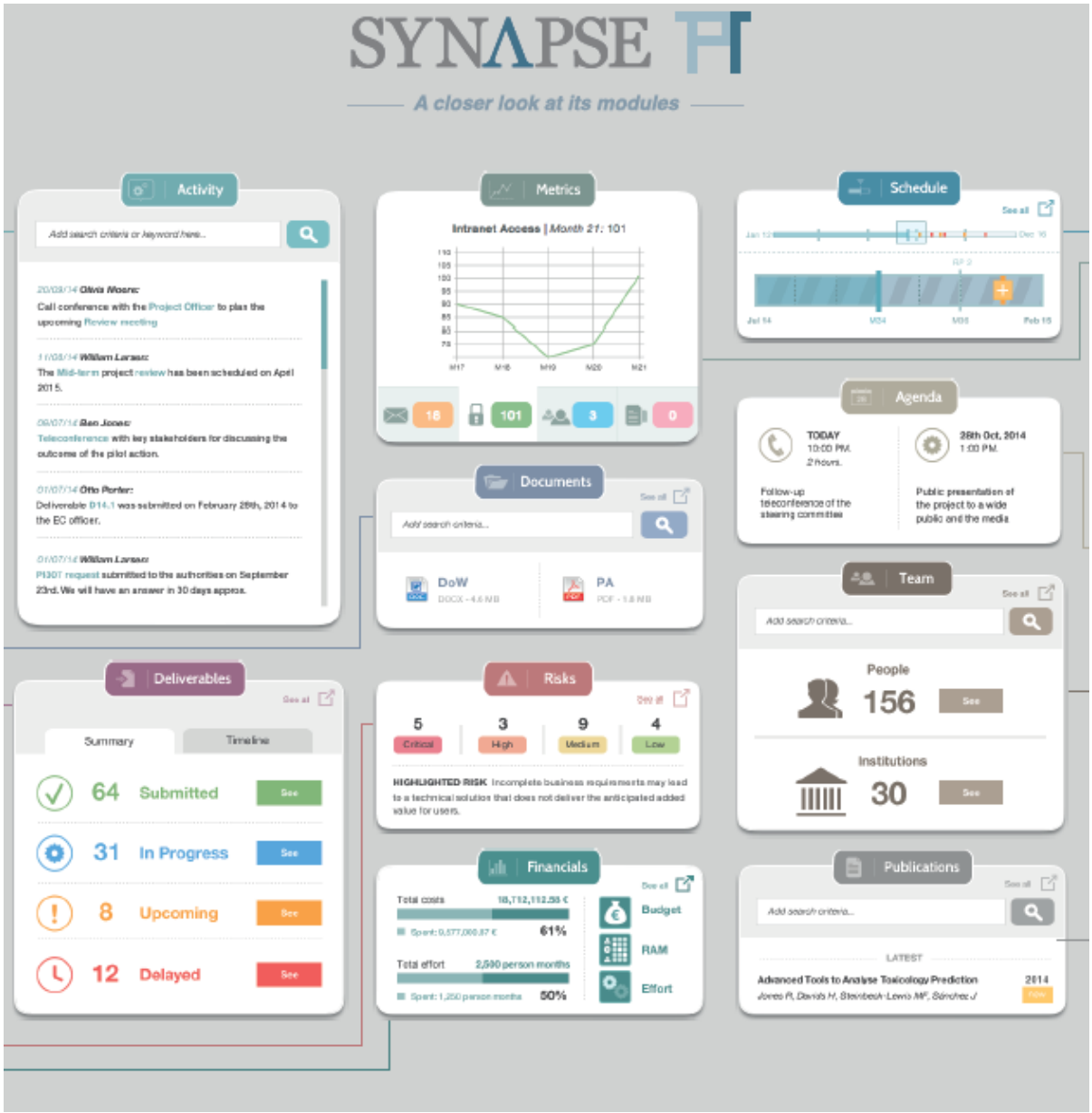

Figure.9 Snapshot of the Project-tailored SYNAPSE PI dashboard

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Annexes

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