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DOCUMENT SHORT ABSTRACT

This document provides the description of the Data-Driven Management Platform (Correlate FEMaLe) and explains the structure adopted to meet the FEMaLe project lean-agile digital management needs. The main aim of this document is to be a brief user manual to provide the partners either with basic instructions to access the platform and with a shared approach to set the platform working spaces and build a common project digital archiving strategy.

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The Correlate FEMaLe platform is in an MVP stage, meaning that new features and functionality will be implemented in the future. This document will be updated accordingly.

¹ As per the project's cloud storage or per email date if applicable.

² Drafted, completed or validated as per the project's cloud storage or per email date if applicable.

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1 Introduction

This document provides the description of the **Data-Driven Management Platform “Correlate”** and explains the structure adopted to meet the FEMaLe project *lean-agile* digital management needs. Main aim of this document is to be a brief *user manual* to provide the partners either with basic instructions to access the platform and with a shared approach to set the platform workspaces and build a common project digital archiving strategy.

1.1 About Correlate: Curing digital chaos

Correlate provides a secure, easy, and flexible solution to synthesize data and information through a non-intrusive, lightweight, high performance, cost-efficient, easy-to-use desktop and mobile friendly web app that connects multi-cloud services.

Correlate.com is a Software as a Service (SaaS) application enabling a transparent and augmented layer on top of other online digital activities, systems and apps. The user correlates their digital asset with a link (URI) which is dragged and dropped into private or team-shared boards where information is further organized, annotated, and accessed by all collaborators.

1.2 Purpose

The Data Driven Management Platform, Correlate, is being developed as a joint effort from the FEMaLe project and other relevant initiatives. The focus of the Correlate platform is to make files easily accessible and findable and aid in the co-operation and co-creation of projects and workflows.

In addition to the platform development, Correlate AS will provide support and suggestions on the project structure, data management plan (DMP) and digital archiving to all FEMaLe Consortium.

1.3 How the Correlate Platform works

The documents shared among WP team members **remain stored on the partners personal cloud services** (e.g. Google Drive, Dropbox, Onedrive). It is under their responsibility to keep the archive organized, properly name the files to avoid confusion, and minimize the risk of working on the wrong files due to file duplication or any other reason.

It is important to keep in mind that **Correlate LINKS TO FILES and does NOT UPLOAD files to the platform**. All permissions and activities of editing or commenting in the documents are performed in the cloud platform and not within Correlate.

1.4 The Correlate Platform development roadmap

Further development of the Correlate platform during Q2 2021 will include:

- Faster response
- More content styling options
- Link previews
- Improved and more intuitive interface with new interaction options
- Smart notification system
- Assign, mention, and comment
- Task management with a timeline view
- And more

IMPORTANT NOTE:

Correlate is still in development. New features will continue to be developed and released.

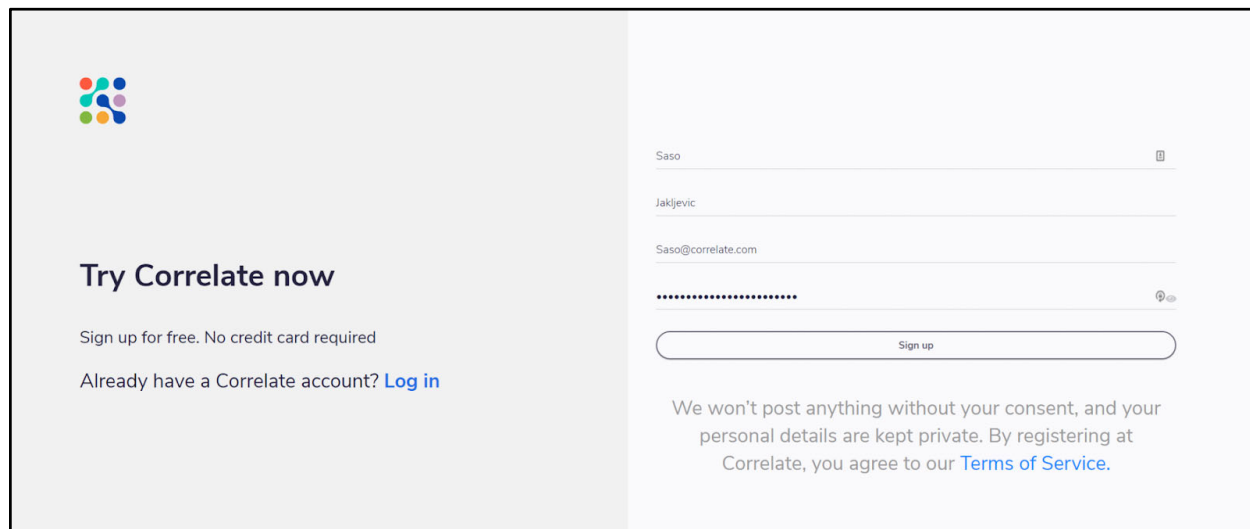
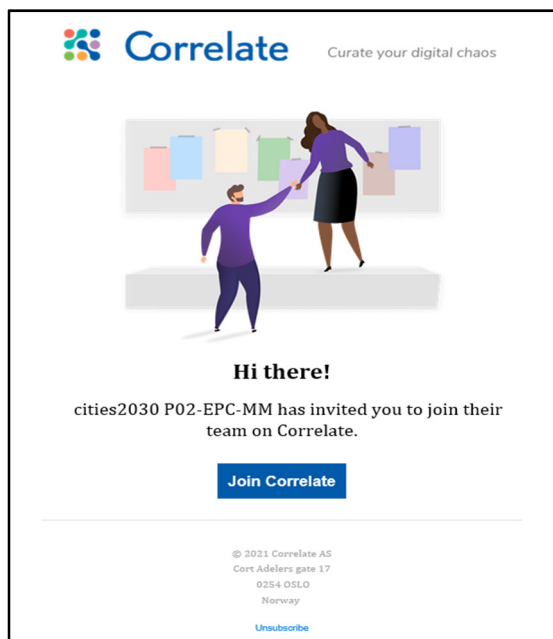
1.5 Correlate Terminology

Integration	The connection between third party or external cloud services like Dropbox, Gmail, Google Drive, etc. and Correlate Platform.
Team	A created area within Correlate.com populated by boards and individuals or a group of individuals with access to and working on shared boards.
Board	A workspace to be used by individuals and teams for collaborative co-creation through adding files, text-based content, and links.

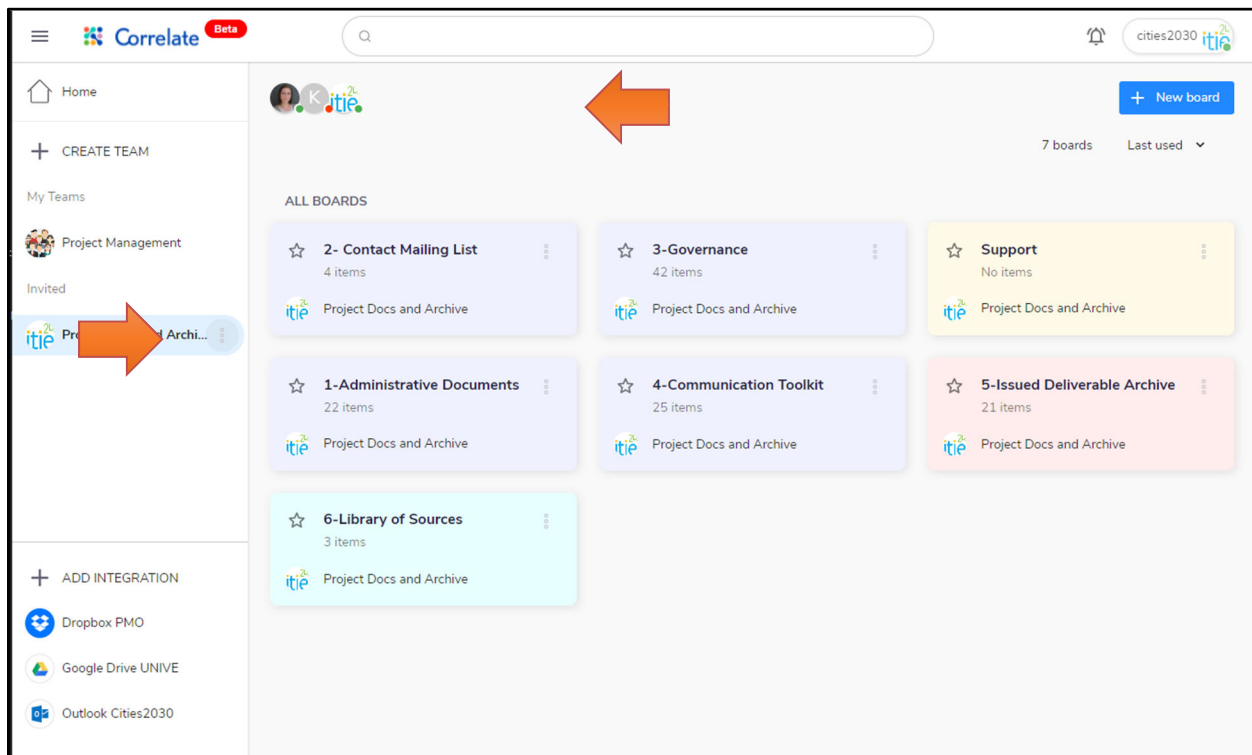
2 PROCESS/WORKFLOW for FEMaLe partners

2.1 Invitation & Log in

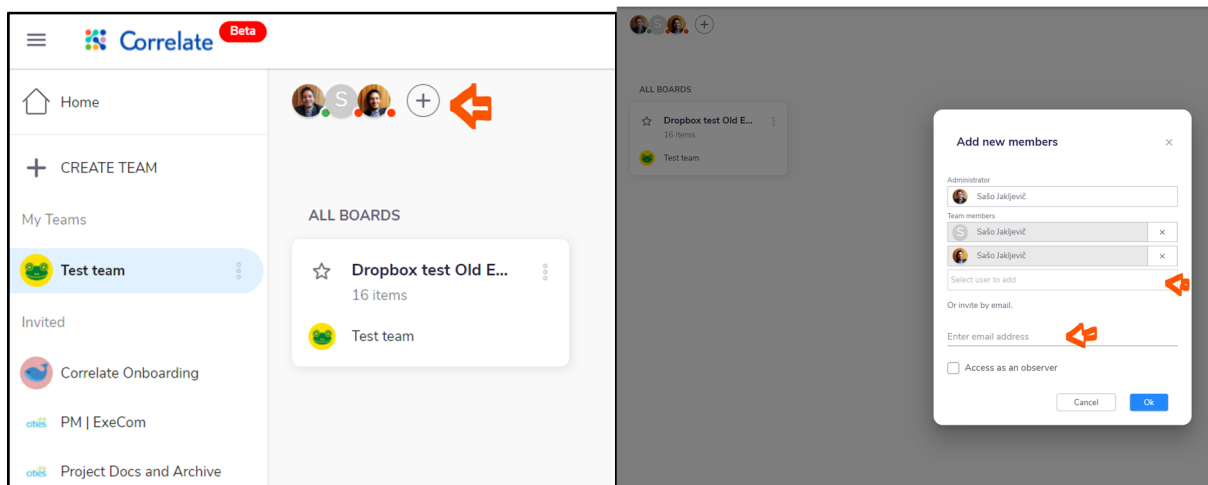
Project partners will receive an email invitation from WP Leaders or Task leaders to their registered **email address as it appears in the official project contact list**. They will have to click the button to set up their account and it will automatically provide them with access to the designated FEMaLe work area in which they are invited to cooperate and share documents and information.



Once logged in, they will see the Team in the left-hand column. Clicking on a team reveals the related Boards. The Team members are displayed at the top.



The team administrator can add team members by clicking on the plus (+) sign. Adding many members at once it is possible by copying the email list and pasting it in Correlate.



2.2 Level of permission for Team members

There are **four levels of permissions within a team**:

1. Owner
2. Administrator
3. Member
4. Observer

The **Owner** has all the rights.

The **Administrators** can create and delete boards as well as edit the content in the boards.

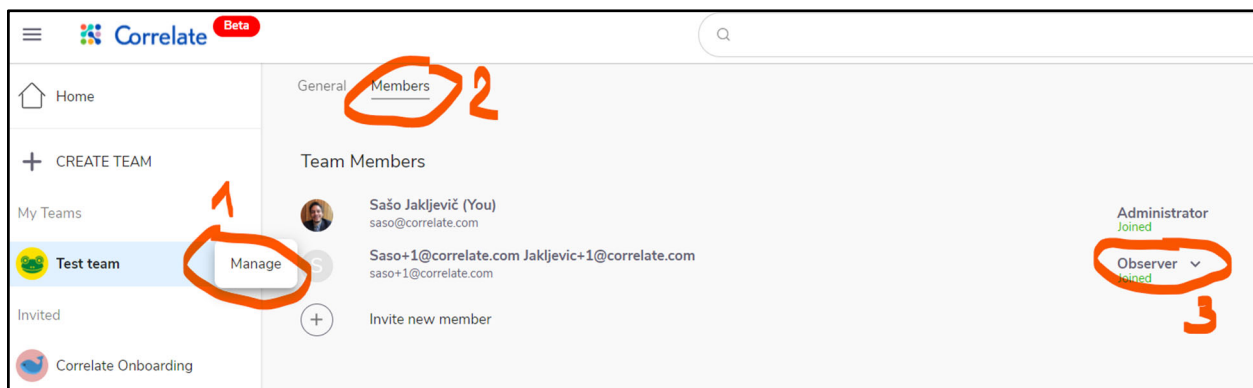
The **Member** can edit the content of the boards.

The **Observer** can only view the board content and open the links or files.

**There can be many owners, but only one administrator.*

To **change a team member's permission level**, the administrator needs to navigate to the team management page. To do this he/she:

1. Clicks on the three dots next to the team's name in the left hand column and selects the option "Manage".
2. On the team management page, click the Members page to get an overview of all the members in the team.
3. Here the permissions can be changed for each member by the administrator.



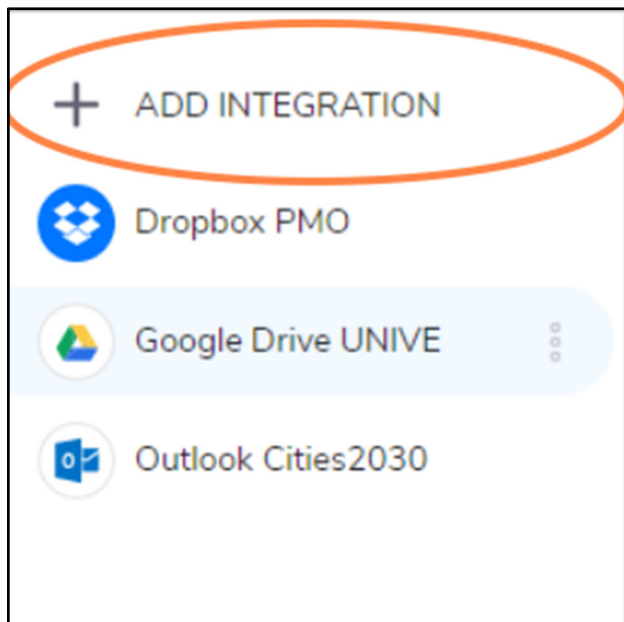
2.3 Setting up Cloud Integrations

Correlate members with Freemium accounts can integrate up to 3 external service accounts. This can be 3 different services (eg. Dropbox, Google Drive and Gmail) or 3 different accounts in the same service (eg. Personal Dropbox, Work Dropbox, Hobby Dropbox).

IMPORTANT NOTE:

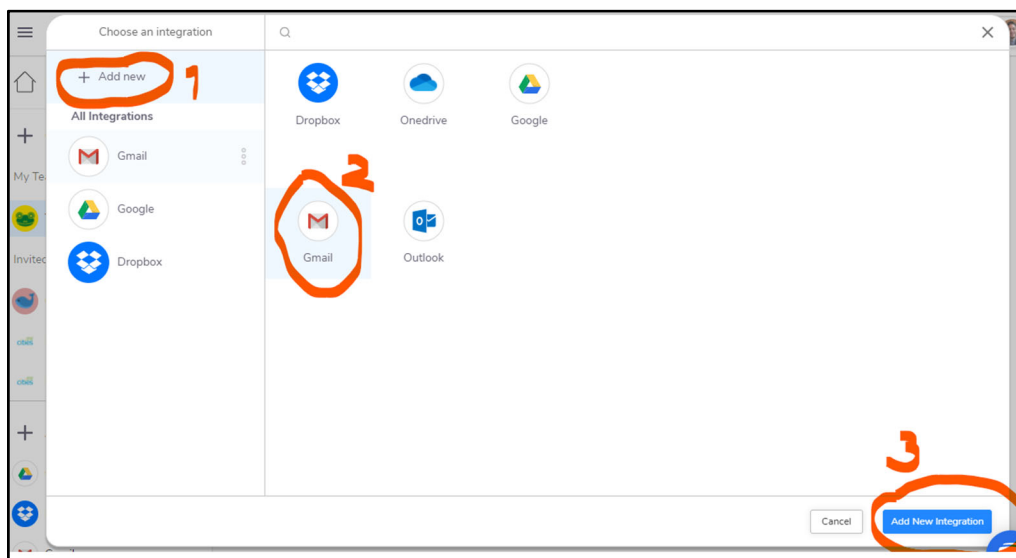
The files from integrations are not uploaded or stored in Correlate. They are just links to the files located in the integrated Cloud Service.

To integrate one of the services a user needs to click on the **Add integration** button.



This will open a catalog of integration options.

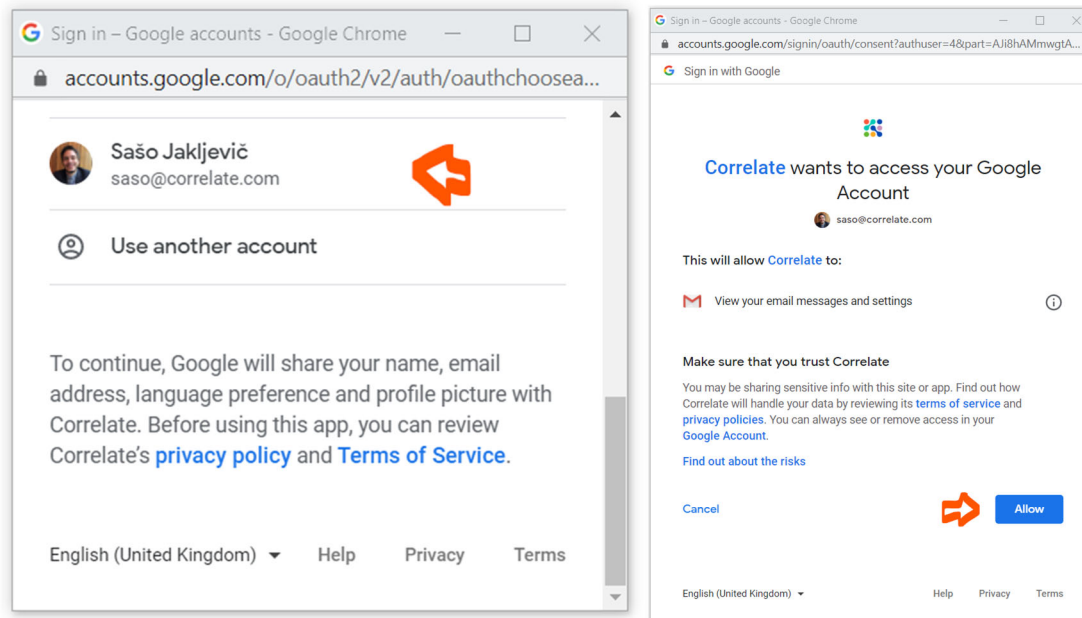
Here users can select the service they want to connect to Correlate.



Clicking on **Add New Integration** will automatically add the service or trigger a popup.

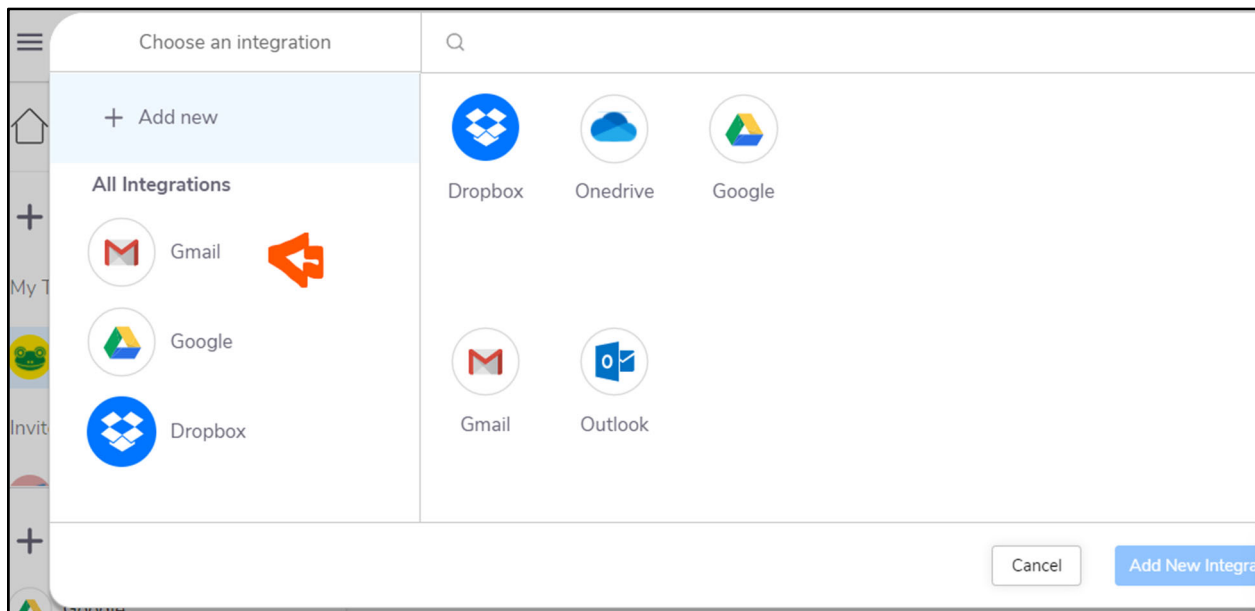
Using this popup user signs into his/her cloud service account or select an account if they have multiple. In the next step the user confirms the Correlates' request to access and edit the resources in the connected service account. After that the service has been integrated.

Here is an example of the popup for **integrating with Gmail**:



IMPORTANT NOTE:

Integrating external service (eg. Gmail or Google Drive) will NOT automatically enable access to your files & emails for anyone in your team. It will only allow **you** to access your files or email from within your Correlate account. This enables you to Search across added integrations and add files to the boards in your team.



2.3 Search functionalities

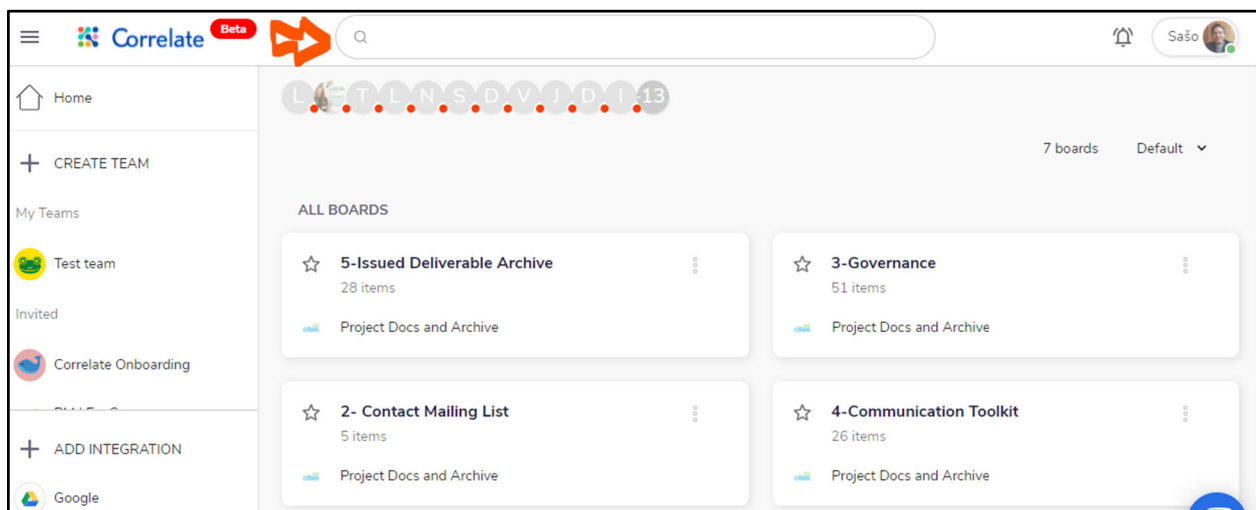
2.3.1 Basic search

Integrating the Cloud Services enables the user to **search through files, links, comments and other content** across the integrations and boards using the main search bar.

The search function helps the users to:

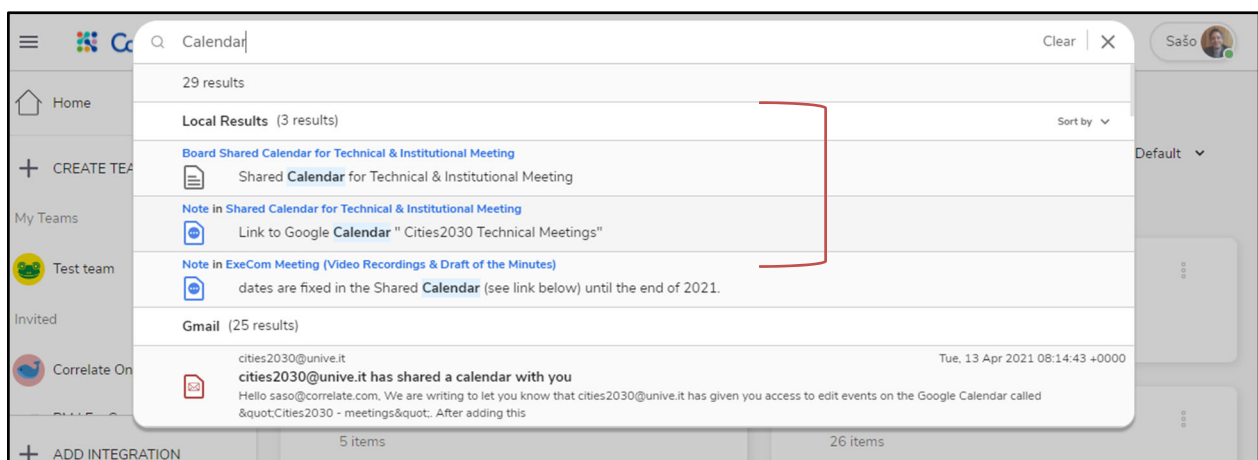
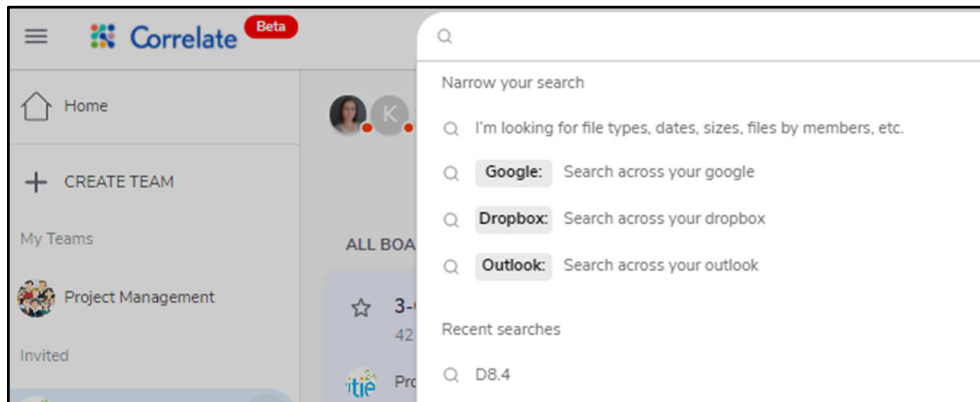
- Find **files** stored on different Cloud Services.
- Find **links to files, comments and other content** integrated in Correlate Boards across Teams.

To access the search feature, you need to initiate the search by clicking into the search field.



Clicking on the search field exposes additional search options like:

- Advanced search mode
- Searching only in one of the integrated services
- Recent searches

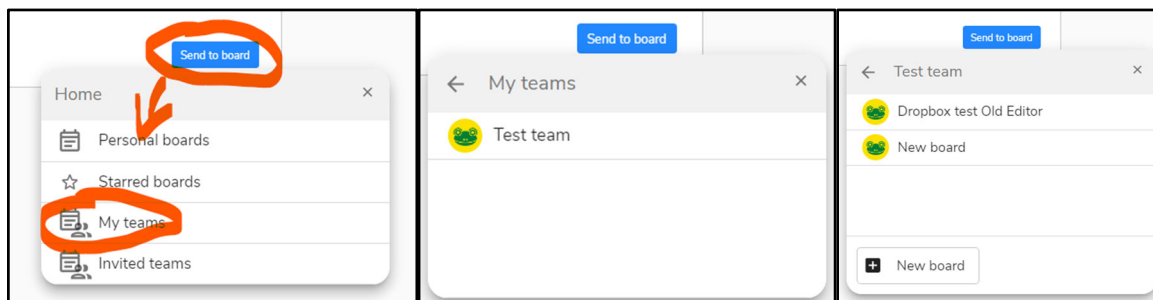
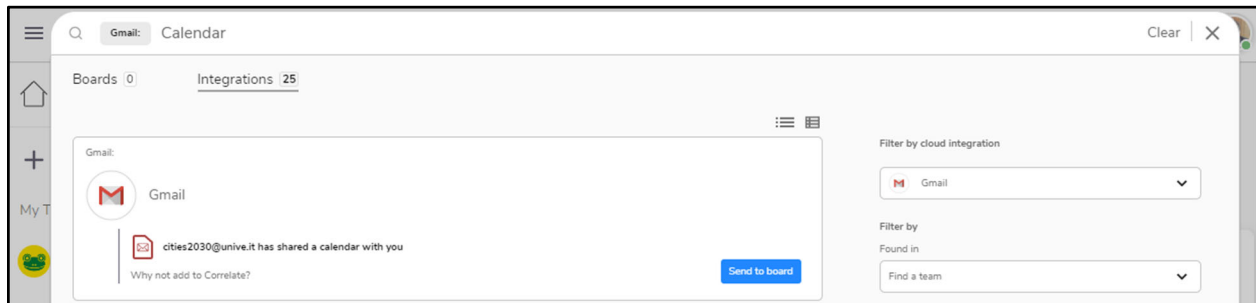


IMPORTANT NOTE:

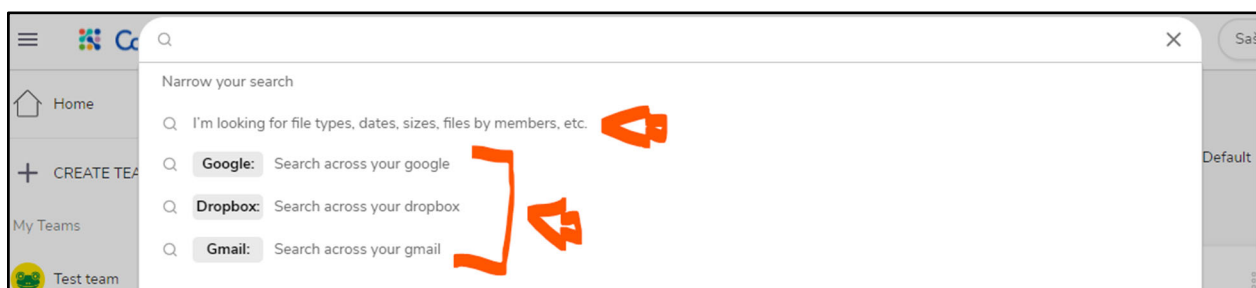
The files and emails are not uploaded or stored in Correlate. What appears in the Boards are just the links to the files. **The files themselves are located in the integrated Cloud Service.** When a user adds a file to the Board on Correlate, the file becomes shared with all members in the Team. Permissions for access to the file are managed within the Cloud Service (e.g., Google Drive, Dropbox, etc.) where the file is stored.

2.3.2 Advanced search

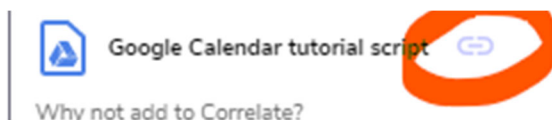
Files or emails in the advanced search results can also be filtered and added to the boards using the **“Send to board”** button or **“drag & drop”** the files to the Board underneath the search popup.



To trigger the advanced mode search user needs to either select a specific integration to search through or click on "I'm looking for file types, dates, sizes..." as seen here:



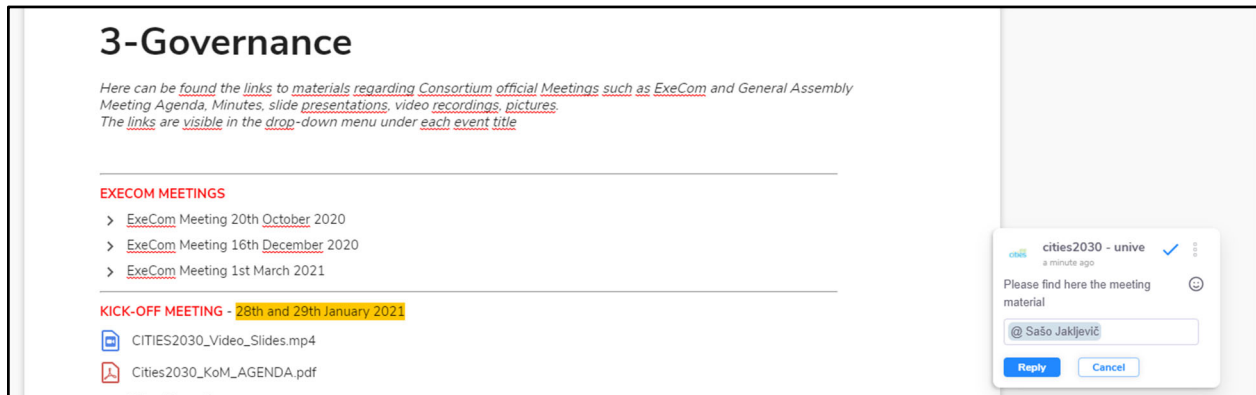
To copy a link to the file from within the advanced search results click on the link icon:



2.4 Board functionalities

2.4.1 Editor

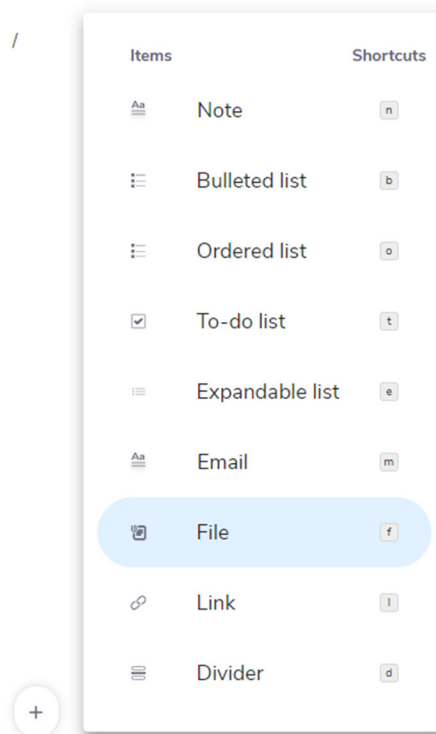
By entering a Board, it is possible to start working in the workspace.



Only the Admins and Owners of the teams can edit the title and description of the boards. Other content in the board can be edited by any regular member.

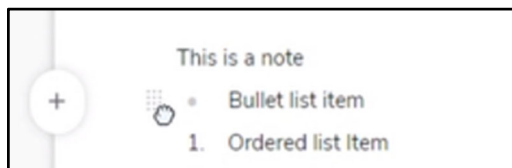
A user can **add one of the available item types** by:

1. typing “/” or clicking the “+” sign.
2. and clicking on an item or pressing a shortcut letter written next to the item



Note	Free text. Can be used to provide descriptions, guidelines, or other context to files and links in a board.
Bullet list	A list using symbols instead of numbers. Can be used to present key points or provide a list without a certain order.
To-do list	A list with checkable boxes. Can be used to keep track of and prioritize tasks.
Expandable list	A hierarchical list that allows users to add items within it. It enables multiple levels of lists. To expand and collapse the expandable list item and view their respective children items, click on the arrow. Can be used to group files for easy access.
File	Add a file from integrations. Opens a search window.
Email	Add an email file if email is integrated.
Link	Add a clickable hyperlink.
Divider	Add a divider line to separate information in the board

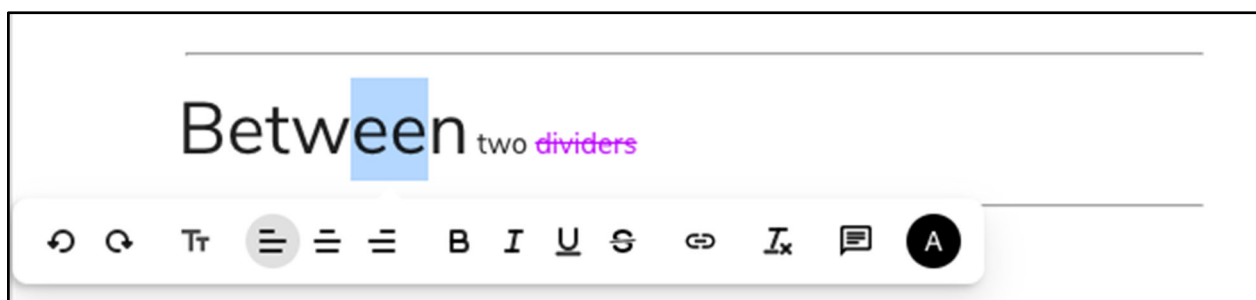
Each item can also be moved by “dragging and dropping” the square icon in front of it.



Each item can be deleted using backspace or delete buttons on the keyboard similar to the Word-type documents.

All content on the board (eg. notes, links, file names,..) can be **stylised using the new editor** enabling:

- Undo (Ctrl/Cmd + y)
- Redo (Ctrl/Cmd + z)
- Change font size
- Bold
- Italic
- Underlined
- Strikethrough
- Insert link
- Clear formatting
- Comment on selected section
- Change color



2.4.2 Email item

Besides files, users can also integrate with Gmail or Outlook and integrate their emails. Adding an email to the board and opening it looks like this:

Open in
×

Curing digital chaos

Received on Jun 28th 2021, 12:32:44 pm
 From: "testwinduser@outlook.com" <testwinduser@outlook.com>
 To: Katja Kern <katja@correlate.com>

About Correlate: Curing digital chaos

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Integration	Connection between third party or external cloud services like Dropbox, Gmail, Google Drive, etc. and Correlate Platform.
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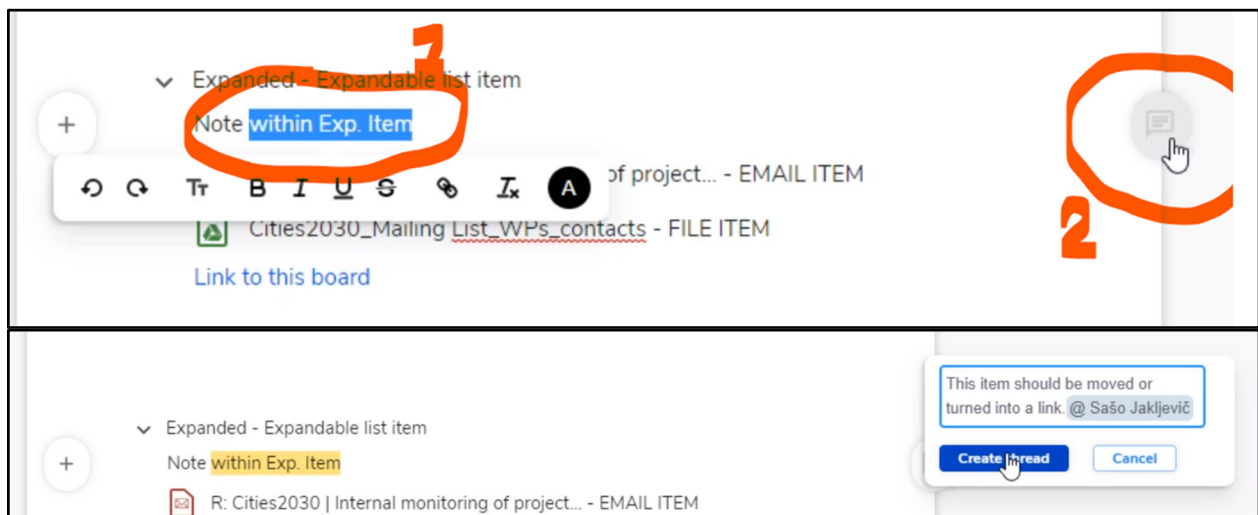
2.4.3 Commenting system

Each added item can now also be marked and commented.

User can add a comment by:

1. (optional) Selecting the section he/she wants to comment.
2. Clicking the comment icon on the right side of the board.
3. Adding a comment.

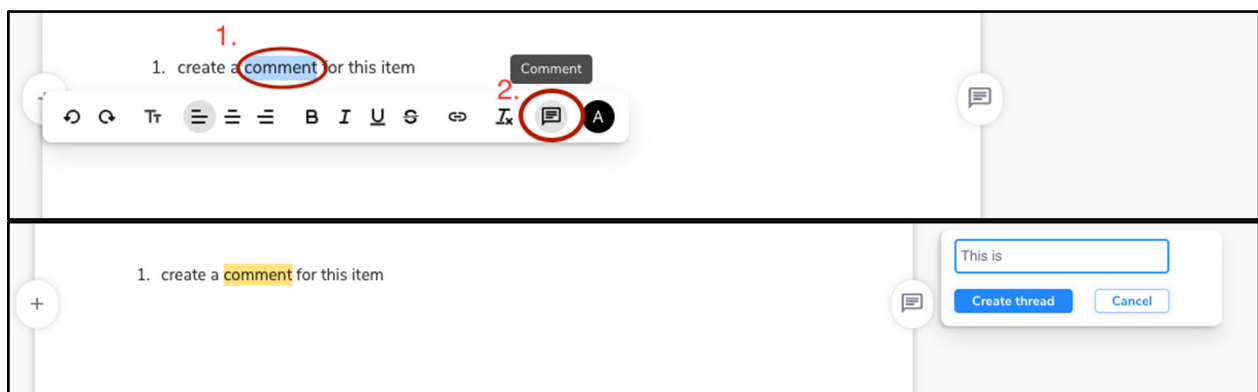
This way the whole item will be highlighted and commented.



Or by:

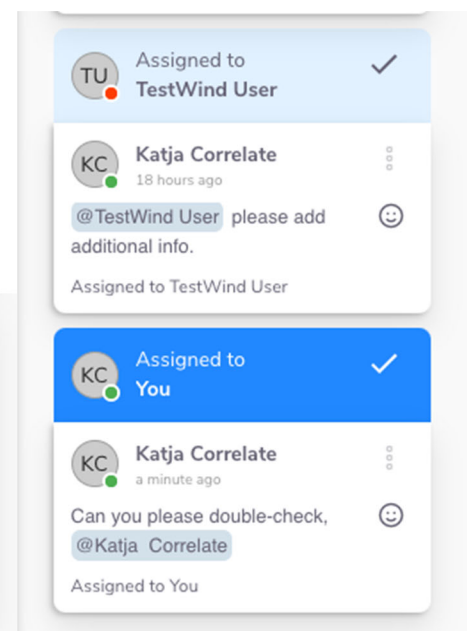
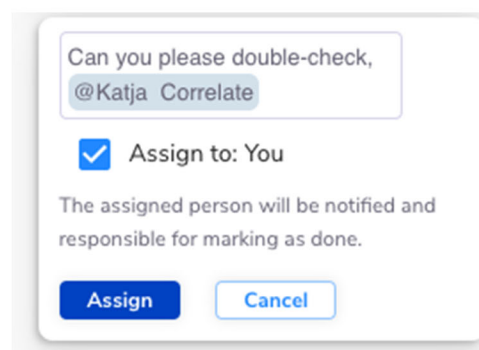
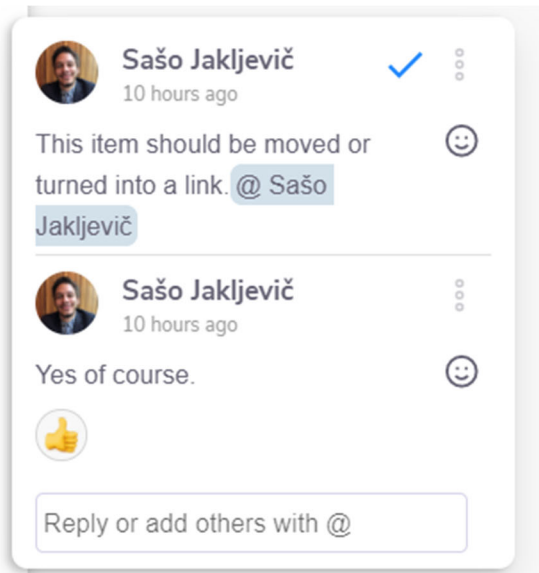
1. Selecting the section he/she wants to comment.
2. Clicking the comment icon in the pop-up that opens
3. Adding a comment.

This way only the selected part will be commented.

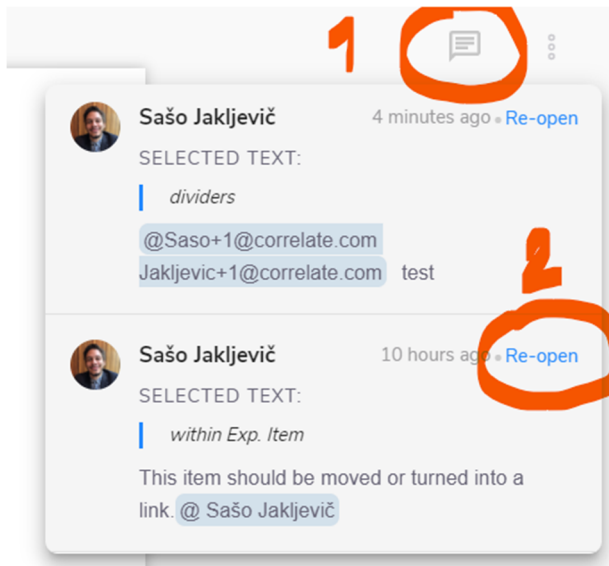


Commenting system also enables users to:

- tag team members,
- assign team members,
- add reaction emojis,
- respond to comments,
- delete or modify a comment,
- resolve or re-open comment threads.

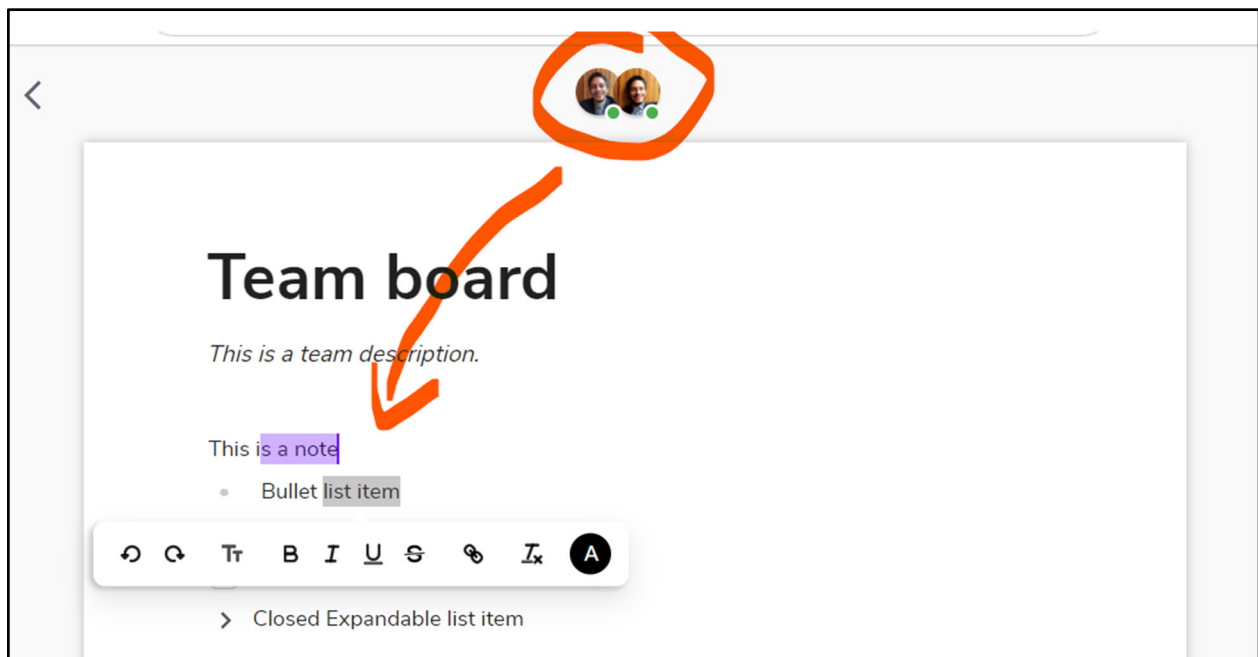


To re-open comment thread, open resolved comment section in the upper right hand corner and click “Re-open”.



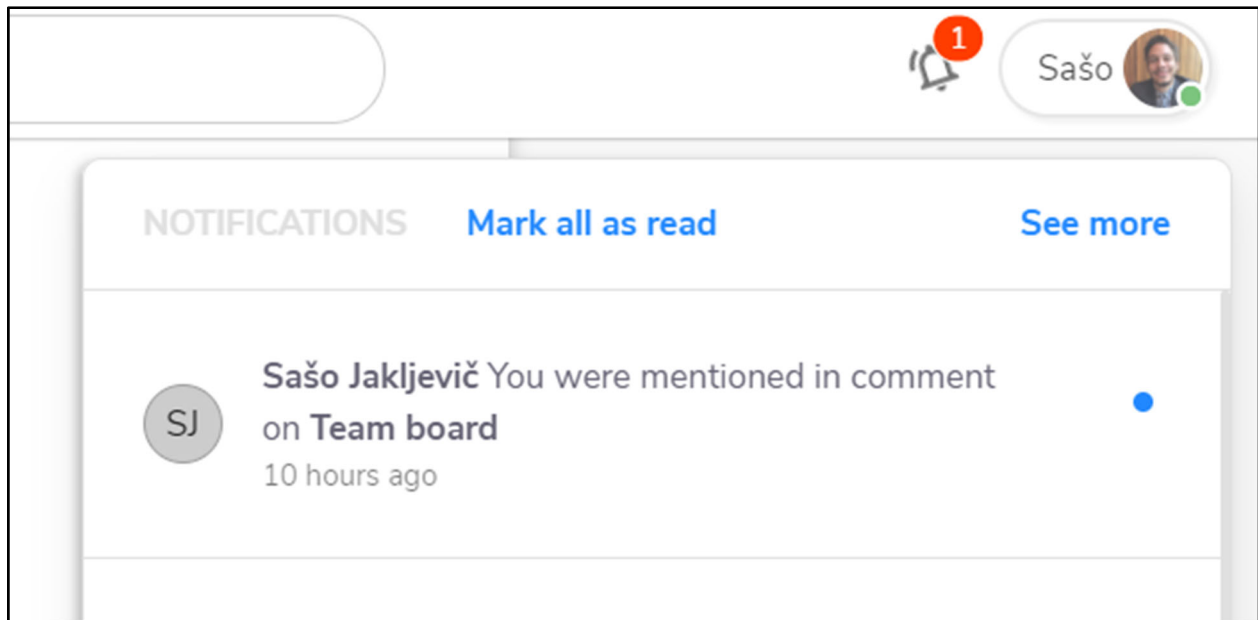
2.4.4 Real time collaboration

A user can also see **what team members are currently active on the board** and collaborate with them in real time.

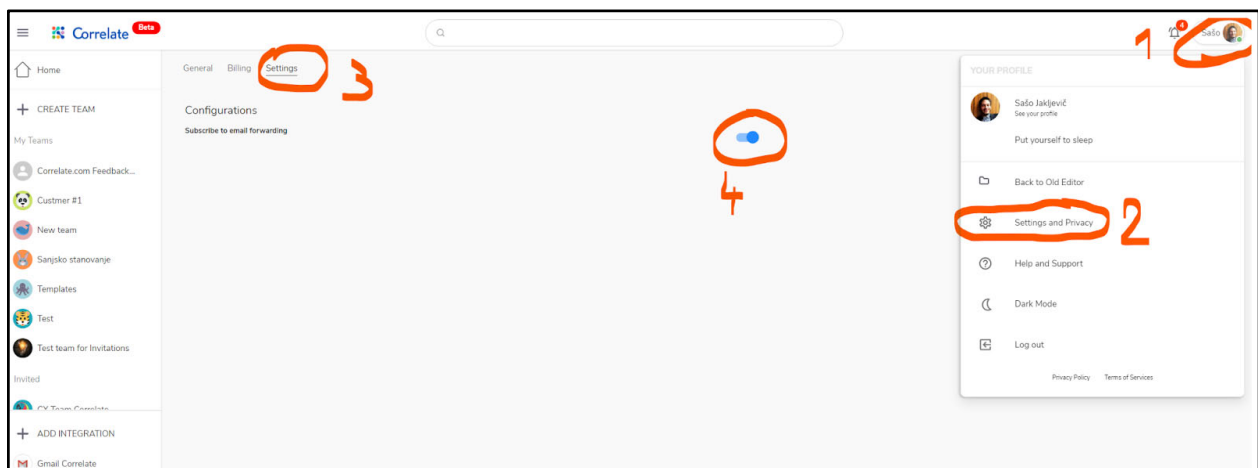


2.4.5 Notification of activity

If a user was mentioned in a **comment**, he/she will receive a **notification visible within Correlate**:

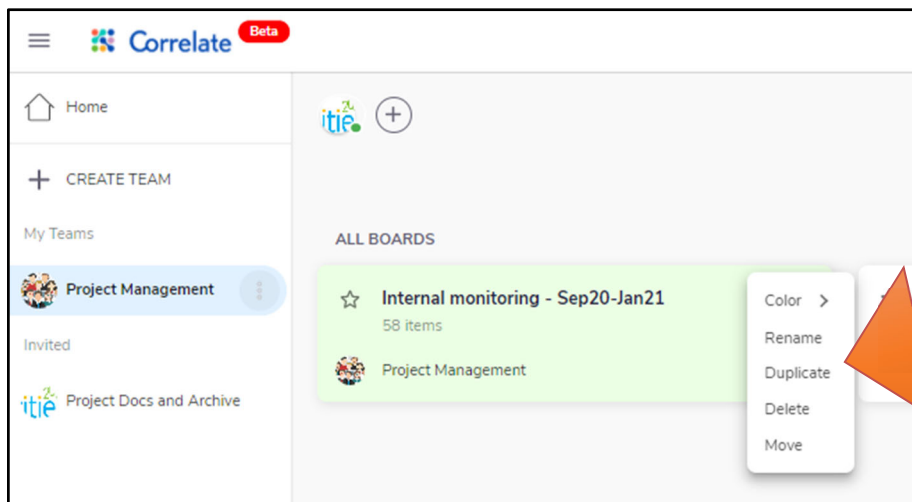


In order to receive notifications of comment mentions to the email, user needs to proactively subscribe to email forwarding as seen here:

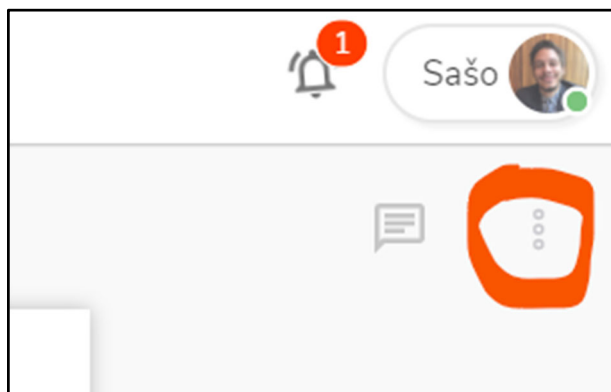


2.5 Duplicate a Board

Boards within a team can be duplicated only by an Owner. This is done by clicking the three dots in the right-hand corner of the board card.



Duplicate feature is also available within a board in the top right corner located a three dotted menu.



Duplication allows the user to create a board with a desired structure and **use it as a template** for new boards optimizing standardized procedures that repeat in the same way during project life (e.g. periodic reporting, organizing periodic project meetings, collecting periodically data, etc.)

3 The Correlate FEMaLe structure

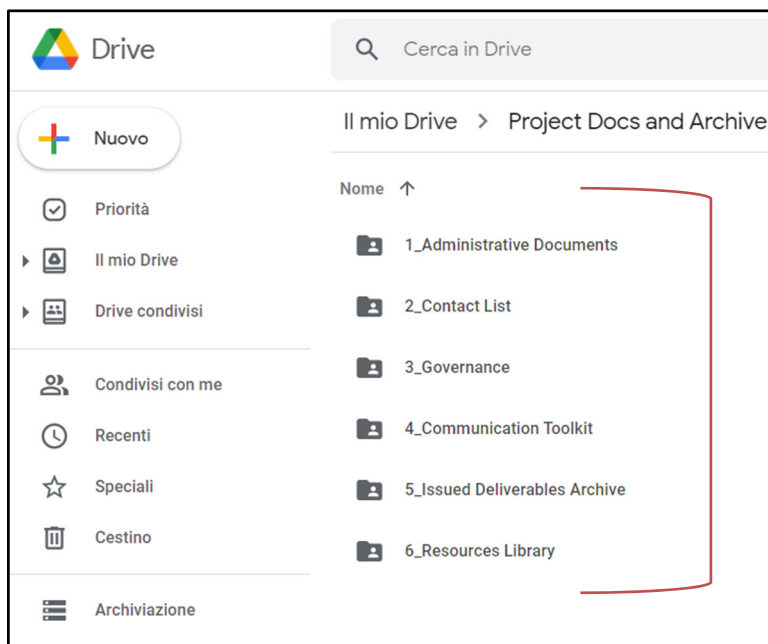
The Correlate platform works as a layer between your different Cloud Services. The files shared in boards are links to the files located in the cloud platform. They are never uploaded to Correlate. It is therefore recommended to begin with a well-organized structure for archiving the documents in every partners' clouds/computers from project start.

Note that any action that would alter the files URI or unique identifier will break the link created in Correlate. Examples of this are duplicating/making a copy of a file, uploading a new version ...

We created a shared space on the online platform – the Correlate FEMaLe Hub – named 'Project Archive and Docs', which will be accessible by the entire Consortium.

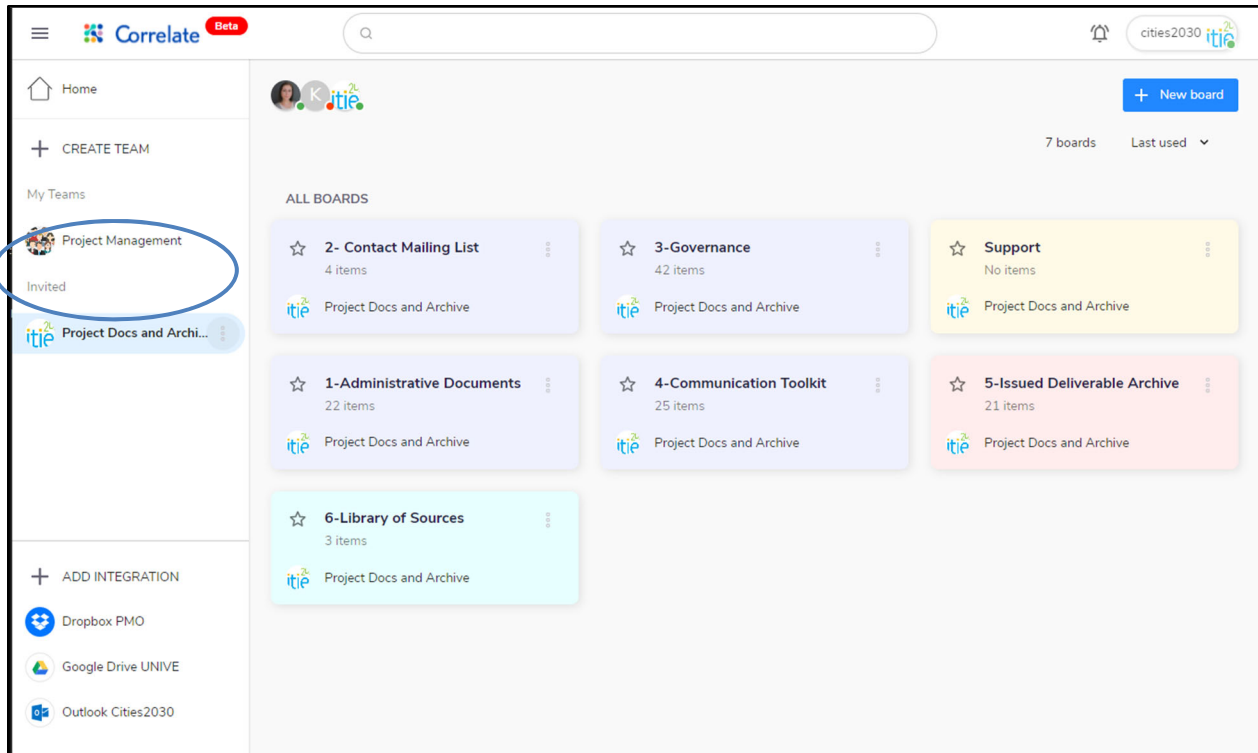
FEMaLe WP Leaders and PMO members will be the first to be invited. Further on, we will create new spaces (Hubs) according to WP needs.

As an example, we provide here below a description about how to structure the folder 'Project Archive and Docs' on the project, using Google Drive:



The Correlate FEMaLe Hub will be accessible by the whole Consortium with the 'Observer' role as the documents herein linked, are final versions which do not require contributions or integrations from other partners. It is meant to be the project's repository of finalized documents (e.g., administrative and financial documents, deliverables, meeting agenda and minutes, communication materials, etc.). It is the starting point for the gradual onboarding of the platform by the Consortium explained in the introduction.

A Correlate FEMaLe Hub containing a Board has been created in the online platform to integrate the links to these documents together with notes and instructions, facilitating the users in its navigation through project basic and official documentation.



When setting up the board, a description to inform and guide the members in the function of the board can be added after the Board title. This can be further supported through clear headings and instructions for each element.

By using different functions, such as Expandable lists, the links to the files can be organized allowing for easy access and findability. To add files to the expandable list, click the '+' icon next to the expandable list item and add files.

It is important to note that this is a starting point. During the project life, this board will be integrated with finalized documents and key information for supporting partners in activities implementation. The same approach can be applied to any board created independently from WP Leaders and task leader.

Links to key documents can be added to the board along with the content on the web, by creating bookmarks and dedicated thematic sections on one Board by using the Divider item. These are just some possible suggestions. Many more can be created according to the different needs and situations that will be developed during project implementation. A notification system activated on this board will keep the Consortium informed allowing all partners to have easy access to all issued project technical documents.

4 Creating Correlate Hub for Working Groups

In the beginning of the onboarding process to Correlate, each WP leader will receive an invitation to join the Hub as previously described.

Once registered and after having integrated the Cloud Services in which their project documents are stored (e.g., Drive, OneDrive, Dropbox), the WP leaders can create Hubs and Boards for their WP activities and invite Task leaders and other partners to their corresponding teams.

Each member of each partner organization invited would need to add their own integrations if they need to share links to their files.

The partner invited in Correlate FEMaLe Hubs by WP Leaders, can have different roles depending on the degree of their involvement in specific project activities.

They can be *Owners* or *Members* (with the possibility to interact and add links or other items in the Boards), or can be simply *Observers*, when no direct contribution to documents finalization is required from them.

This way they can have access to the documents linked in the Boards contained in a specific Hub.

Even if the file is shared in Correlate, the permission to access it and edit it is anyway managed from within the Cloud Service where the file is stored.

5 Guidelines for local storage

When creating own Boards, WP Leaders are recommended to follow the suggestions and the approach previously described.

Correlate provides different features to use within the Boards to structure and add context to the files and information shared. There is a wide space for everyone's creativity in using the Boards for several organizational needs.

Periodically, WP leaders will be asked to share among each other solutions implemented in their own Working Groups, so that good practices and ideas can be shared creating added value for all.

Each WP Leader or Task Leader is responsible for the creation and structuring of Hubs and/or Boards to integrate the links of those documents that need to be shared and elaborated by the partners involved in the specific tasks.

Therefore, they are responsible as well for creating a structure on the Cloud platform (e.g., Drive, Dropbox, OneDrive) before the above-mentioned documents can be stored and shared. It is easy to understand how crucial it is to start with a well-organized structure for archiving the documents in each personal cloud service.

5.1 Local storage of FEMaLe documents

All documents related to the project should *always* follow a naming convention starting with the project acronym followed by the WP and/or the Deliverable number to which they refer. E.g.: The naming convention is crucial when many members work on the same file shared in Correlate to avoid duplicate files, working on the wrong version, or losing data.

Please follow the naming convention and keep the files organised in your own cloud storage service. If users create new versions of a file that file should be linked to Correlate, clearly named and numbered (e.g., _v2 / _v3, etc..) to avoid confusion.

Adding a 'Note' is a good way to further explain and provide context to the files for all the members that share the same Board.

Correlate makes it easy to *correlate* different sources of information in one place ensuring to never lose sight of the size of the project and the partnership. However, **if the flexibility can work in a smaller project can become unmanageable in such a large partnership.**

It is therefore essential to follow these basic rules when working together. Also following internal communication rules set by the PMO, such as using a subject line with the project acronym and the topic of the email and having a common and well-organized approach on storing project documentation in own clouds boards, will facilitate good communication and collaboration between partners.

Correlate provides a simple interface which allows partners to switch from one Hub to another throughout project life, making work between teams easy to navigate. But everyone must do his part in making this cooperation smooth and easy.