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FEMaLe

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H2020 Specific Programme – Council Decision 2013/743/EU of 3 December 2013 establishing the Specific Programme Implementing Horizon 2020 - The Framework Programme for Research and Innovation (2014-2020) (OJ L 347, 20.12.2013, p. 965).

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Financial Regulation (FR) – Regulation (EC, Euratom) No 966/2012 of the European Parliament and of the Council of 25 October 2012 on the financial rules applicable to the general budget of the European Union (OJ L 298, 26.10.2012, p.1).

Rules of Application (RAP) – Commission Regulation (EC, Euratom) No 1268/2012 of 29 October 2012 on the rules of application of 1 Regulation (EC, Euratom) No 966/2012 of the European Parliament and of the Council on the financial rules applicable to the general budget of the Union (OJ L 298, 26.10.2012, p.1).

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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. 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 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.

With the development of the AI assistant in Correlate, the goal is to support summarisation, packaging, meta tags, and metadata creation for archiving purpose in the end of the project. Additionally, Correlate will have archiving integrations to help retain project knowledge.

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, SharePoint). It is their responsibility to keep the archive organized and name the files properly to avoid confusion and minimize the risk of working on the wrong files – due to file duplication, for example.

It is important to keep in mind that **Correlate gathers 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

Main development and improvements of Correlate platform from Q3 2022 until Q4 2023 included:

- Integration with SharePoint.
- Share-point integration.
- Generative AI.
- Tasks.
- Board History.
- Real-time collaboration.
- Board Customisation - Cover, Icons, Emojis.
- Advance Spotlight mode for YouTube.
- Bookmarks.
- Comments.
- Upgraded Security (with Login notifications and displayed Sessions).
- Files drag & drop (directly for desktop).
- Public boards (with guest access).
- Split Screen Work Mode.
- System Notifications & Tooltips.
- Maze & Miro: embedded link support.
- Display attachments in search results.
- Have default display of link preview.
- New approach of expandable list.
- Auto detection: URL & email.
- Sorting improvements.
- Adding editing and commenting option to the Shared (Public) boards.

There is always a continuous improvement in terms of usability, system performance and bug fixes. The current and next developments in Correlate from Q4, 2023 until the end of the project include:

- Project Archiving.
- AI Co-Pilot: Using content as context (for translation, summary, weekly digest, etc).
- AI Co-Pilot: Support project archiving.
- Search across cloud storage & integrations.
- Add chat & video conference tools.
- Interactive emails & guest collaborations.
- Task Management Tracking.
- Permission control.

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

1.5 Correlate Terminology

Integration	Connection between third party or external cloud services like Dropbox, Gmail, Google Drive, SharePoint and Correlate Platform.
Workspace (<i>Team</i> before)	An area created within Correlate.com populated by boards and individuals or a group of individuals with access to and working on shared boards.
Doc (<i>Board</i> before)	A board to be used by individuals and teams for collaborative co-creation through adding files, text-based content and links.

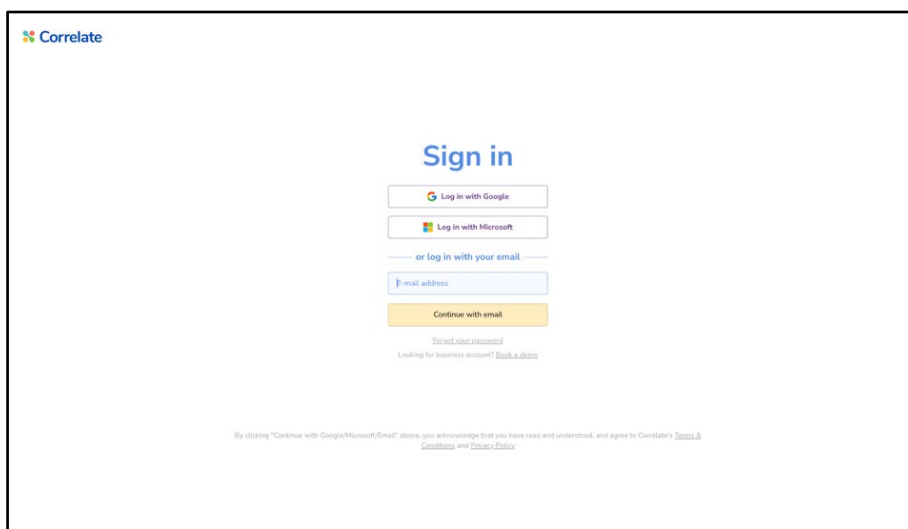
2 PROCESS/WORKFLOW for FEMaLe partners

2.1 Invitation, Login, Adding Team Members and Request Access

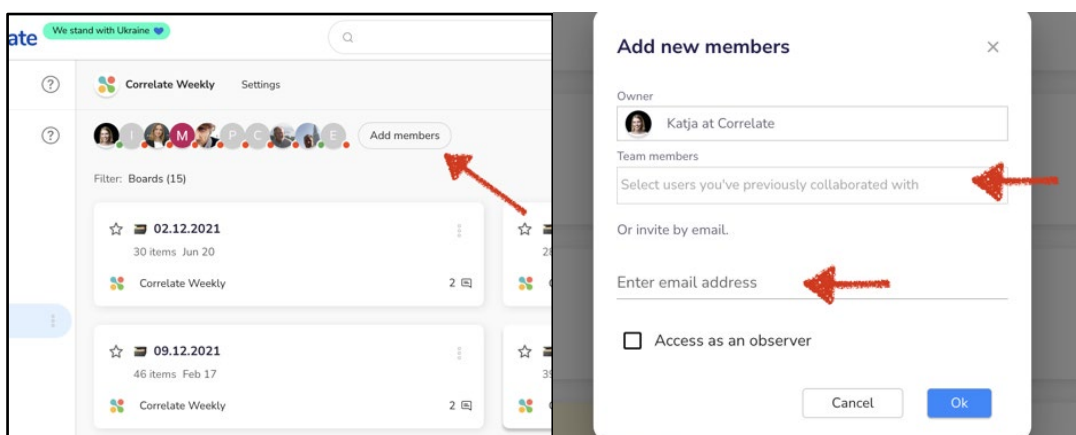
Project partners will receive an email invitation from WP Leaders or Task leaders to their registered **email address as it appears in the official project contact list**. They will have to click the button to set up their account and it will automatically provide them with access to the designated FEMaLe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

IMPORTANT NOTE:

The partners must sign in always with the same email to have access to their Correlate account and permissions. Signing in with an email different from the initial one will create a new user.

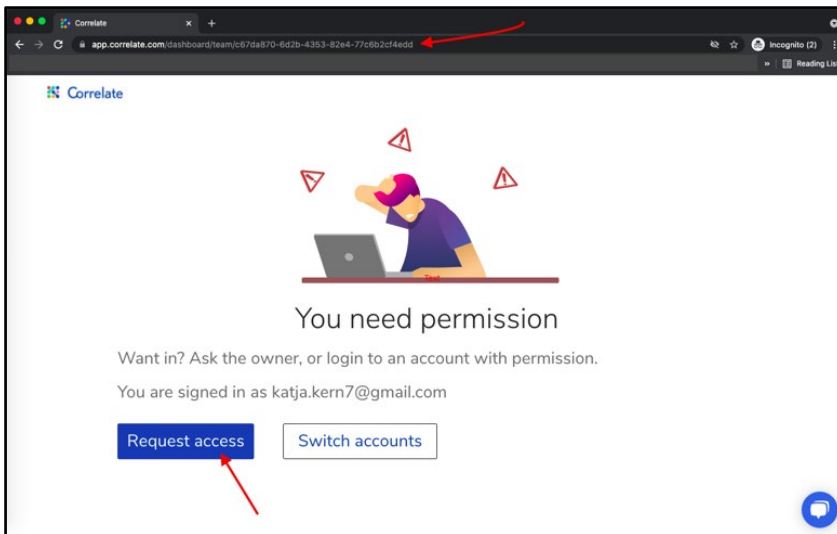


Once logged in, you will see the Team in the left-hand column. The Team owner/administrator can add team members by clicking on the 'Add members' button. It is possible to add several members at once by copying the email list and pasting it in Correlate.

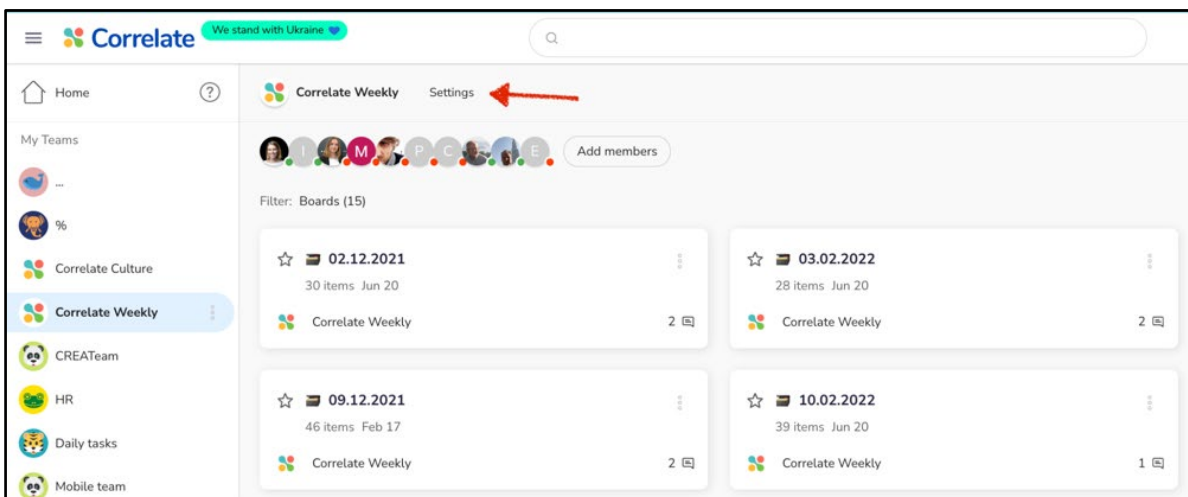


You can also Request Access to the Team, by:

1. Signing into the Correlate account.
2. Putting the Team URL into the browser.
3. Clicking the button Request access.



The Owner/Administrators will receive email notification and notification in Correlate. By clicking 'Open team settings' in the received email, the Owner/Admin of the Team will be redirected to the Teams Member page.



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 — creating and deleting boards, duplicating and moving boards, inviting team members, managing permissions of team members and editing content.

The **Administrator** can create boards, edit titles and descriptions, edit the content in the boards and manage the permissions of members of the team.

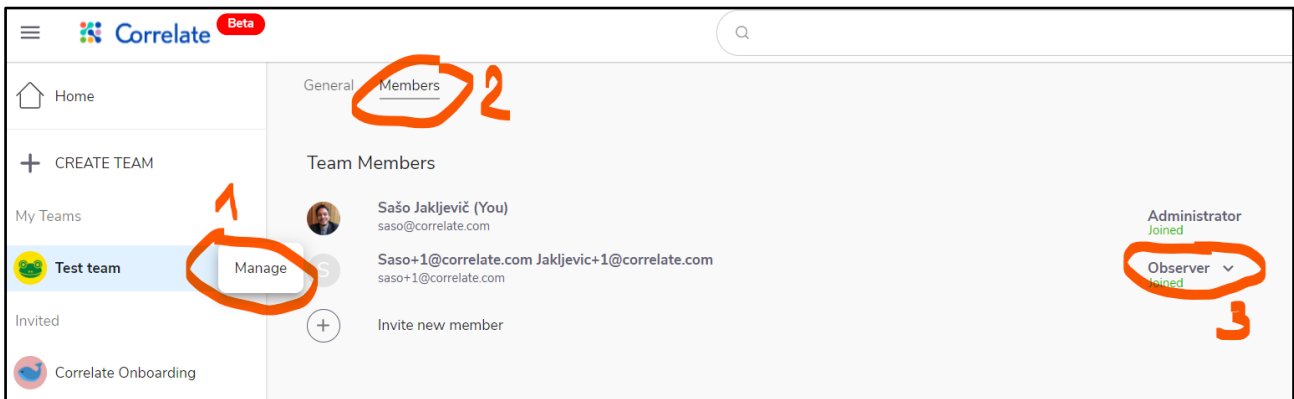
The **Member** can edit the content of the boards.

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

There can be several administrators, but only one owner.

To **change a Team member's permission level**, the Owner/Admin needs to navigate to the Team management page:

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



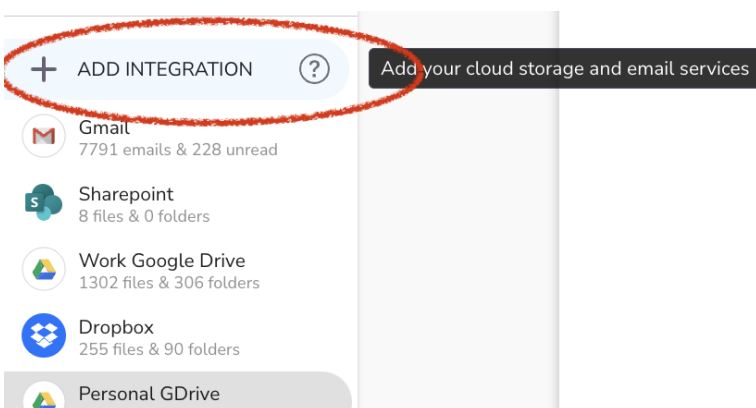
2.3 Setting up Cloud Integrations

Correlate members with freemium accounts can integrate up to 3 external service accounts. This can be 3 different services (e.g. Dropbox, Google Drive and Gmail) or 3 different accounts in the same service (e.g. 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, you need to click on the **Add Integration** button:



1. This will open a catalogue of integration options.
2. Here you can select the service you want to connect to Correlate.
3. Clicking on **Add New Integration** will automatically add the service or trigger a popup.
4. The user signs into their cloud service account or selects an account if they have multiple.
5. The user confirms the Correlates' request to access and edit the resources in the connected service account. Now, the service has been integrated.

IMPORTANT NOTE:

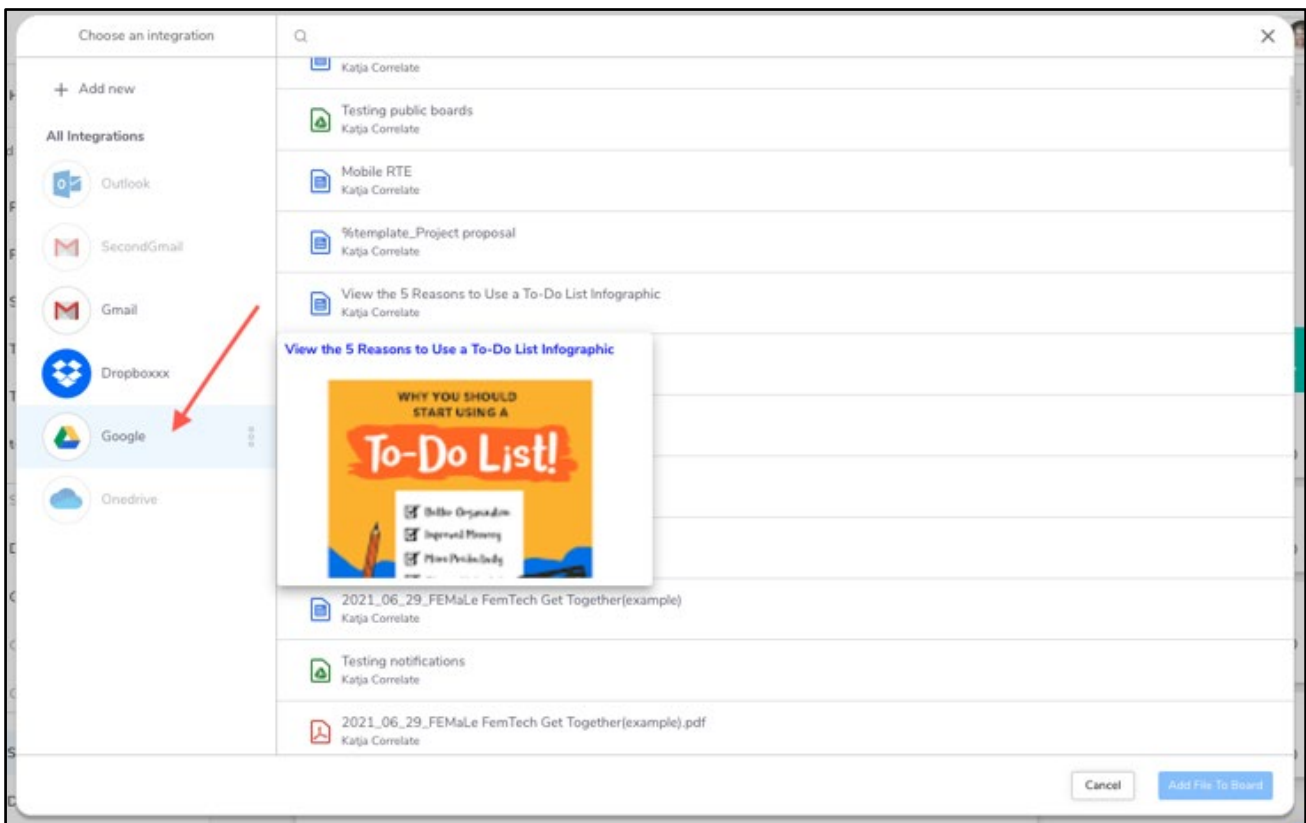
Integrating external services (e.g. Gmail or Google Drive) will NOT automatically enable access to your files & emails for anyone in your team. It will only allow **you** to access your files or email from within your Correlate account. This enables you to Search across added integrations and add files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

2.3.1 Integration view

When the user clicks on the integration on the left menu, a pop-up window opens with the emails/files/folders from the integrations displayed.

You can see the emails by the timestamp (from the latest to the oldest), load more emails, add them to the board, and search for a specific email. By double-clicking the email result, you will see the email preview or even go to your inbox.

In storage integrations (Google Drive, OneDrive, etc) the user can see previews of the folders when passing the mouse over the names of the documents, loading more documents, searching for a specific one, adding it to the board, etc.



2.4 Search functionalities

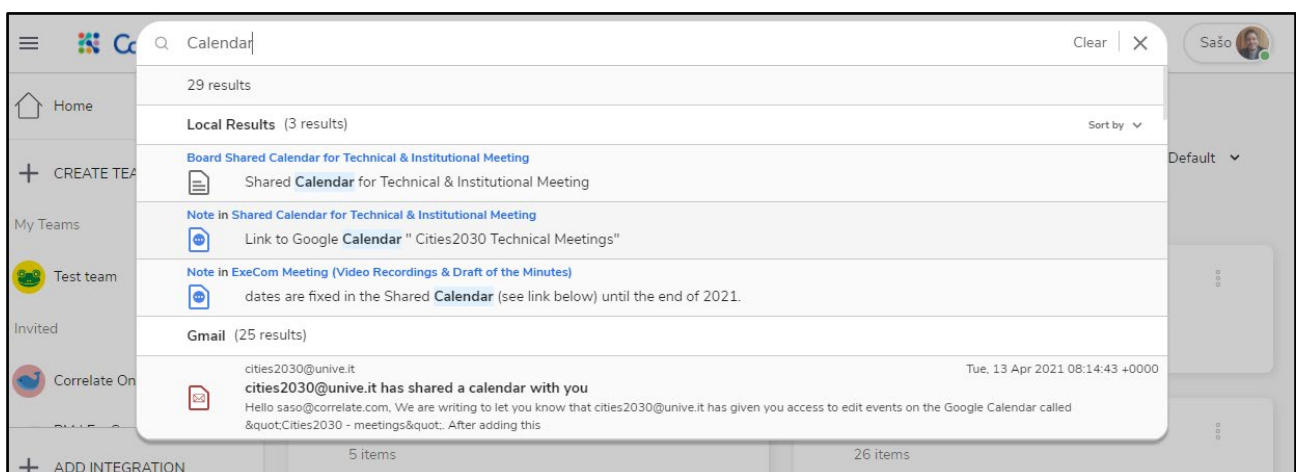
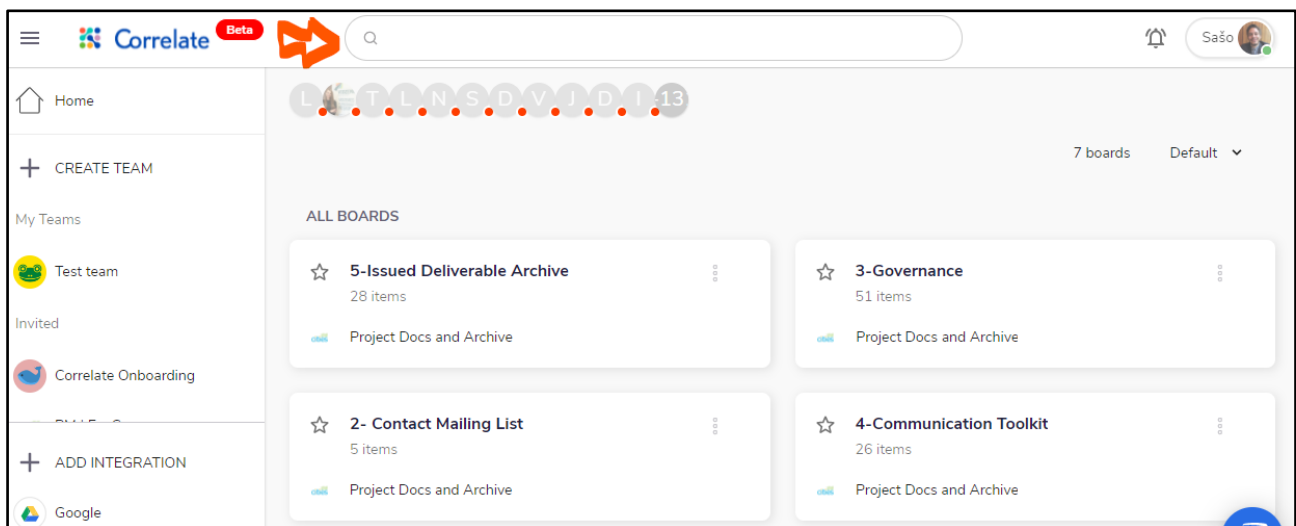
2.4.1 Basic search

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 you to:

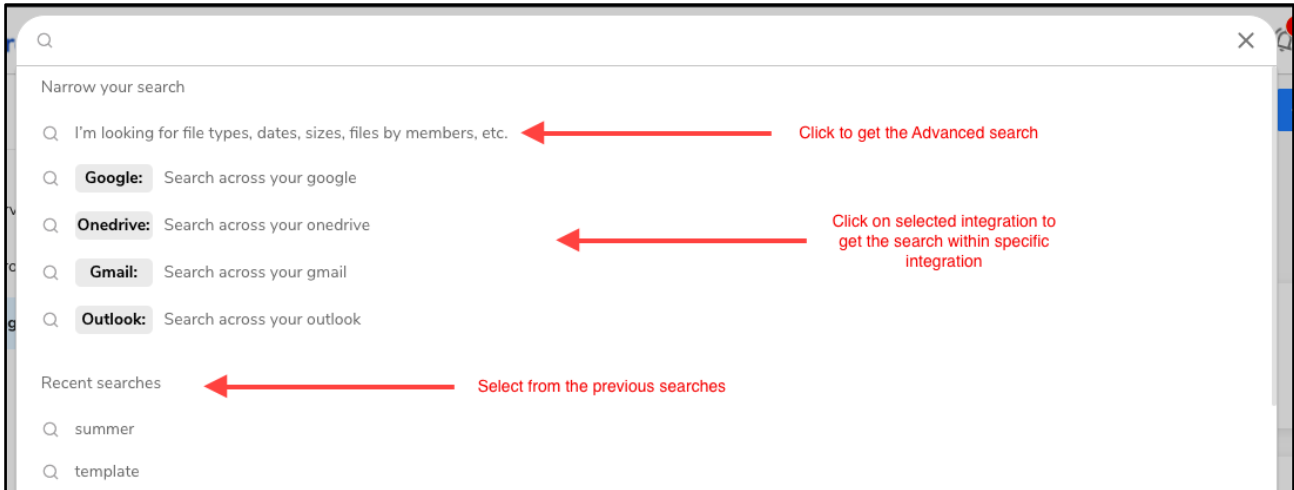
- Find **files** stored on different Cloud Services.
- Find **links to files, comments and other content** integrated in Correlate Boards across Teams.

To access the search feature, you need to initiate the search by clicking on 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

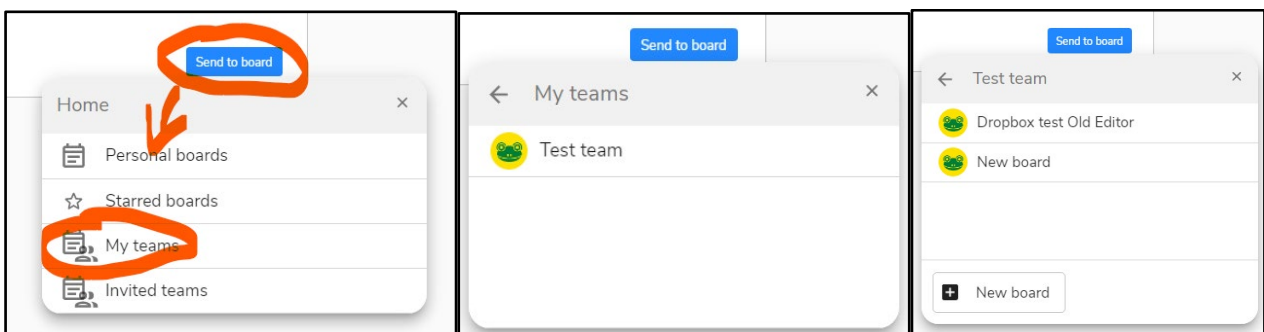


IMPORTANT NOTE:

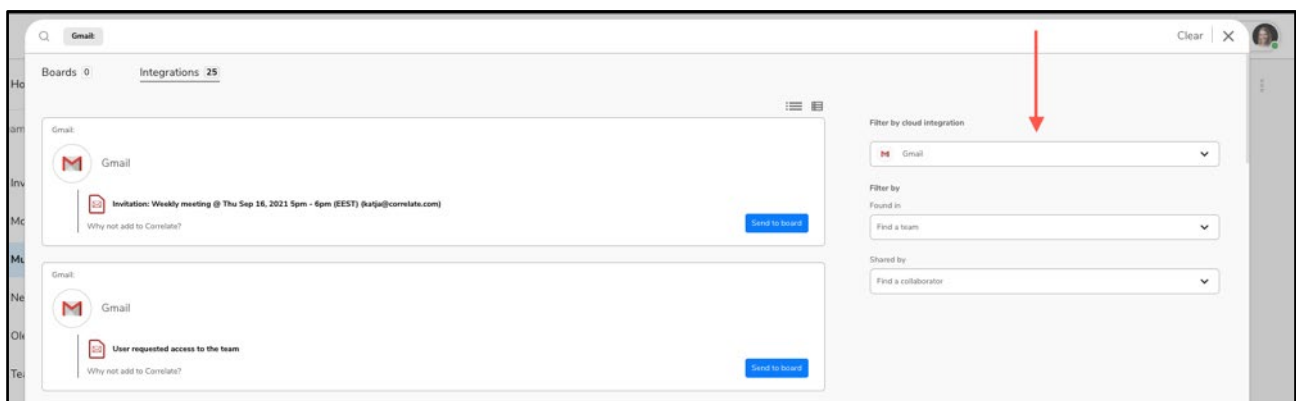
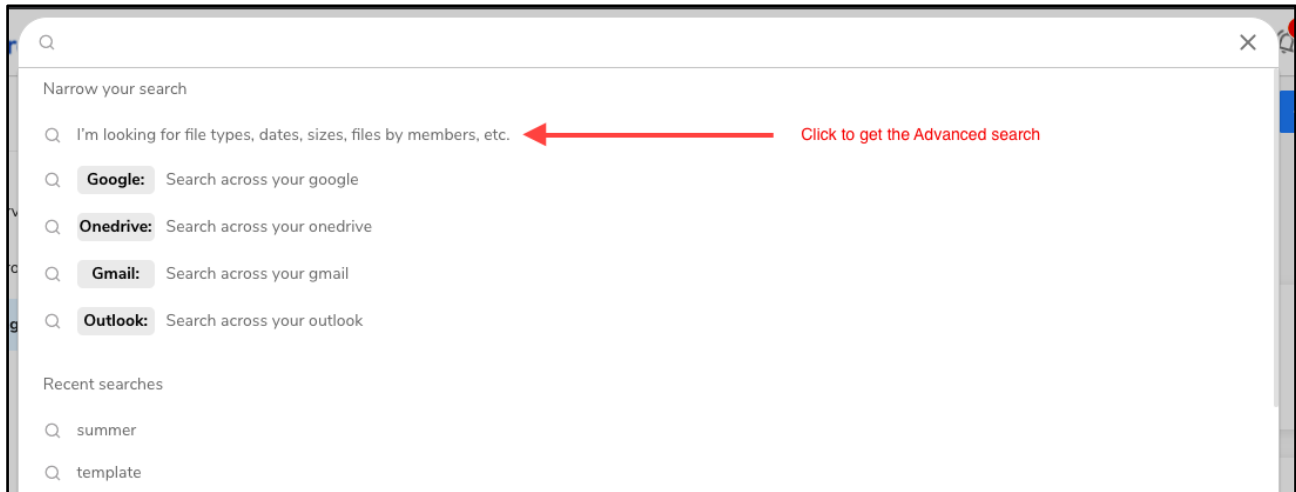
The files and emails are not uploaded or stored in Correlate. What appears on the Boards are just the links to the files. **The files themselves are located in the integrated Cloud Service.** When a user adds a file to the Board on Correlate, the file becomes shared with all members of the Team. The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

2.4.2 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, etc." as seen here:



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

2.5 Board functionalities

'Tooltips' are added to the majority of the buttons in Correlate. Put your mouse on the button and wait for a second - the tooltip with additional information about the functionality will appear.

2.5.1 Editor

By entering a doc, it is possible to start working in the board.

Only the Owners/Admins of the Teams can edit the title and description of the boards. Any other Member can edit the content on the board.

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

1. typing "/" or clicking the "+" button.
2. and clicking on an item or pressing a shortcut letter written next to the item:

AI assistant	Format your text to the desired length, tone, level of detail and style, asking directly to AI. All users have free 10 prompts per day; Pro users have unlimited prompts.
Note	Free text to provide descriptions, guidelines, or other context to files and links in a board.
Bulleted list	A list of symbols instead of numbers to present key points/provide a list without a certain order.
Numbered list	A list organised sequentially to present key points ordered in numbers.
Checklist	A list with checkable boxes to keep track of and prioritize tasks.
Expandable list	A hierarchical list that allows you to add items within it, enabling multiple levels of lists to group files for easy access. To expand and collapse the expandable list item and view their respective child items, click on the arrow.
Email	Add an email file if email is integrated.
File	Add a file from the integrations you added to your Correlate account.
URL	Add a clickable URL, presented as a link, a bookmark or a preview.
Divider	Add a divider line to separate information on the board.
Task list	Create tasks, assign people to them and add a deadline

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

The same icon can be used to open the 'Change item' menu that contains options to duplicate the item, insert new one, move item, transform one item into another, or delete it.

With the **Direct link**, you can get the URL of the item copied to your clipboard and this way you are able to share it with others.

To **select multiple items**, click on the left side of the item and drag over the items. You can change the position of the items, duplicate all of the selected items or convert them to different type of item.

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

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

- Undo (Ctrl/Cmd + z).
- Redo.
- Change font size.
- Alignment.
- Bold.
- Italic.
- Underlined.
- Strikethrough.
- Insert link.
- Clear formatting.
- Comment selected word.
- Change colour.

To visually enrich the board, you can **add a cover or icon** at the top of the board. The buttons will appear when you move the mouse on the top of the board, above the title.

2.5.2 Link previews

You are able to drag and drop, paste or insert links via "+" button into the Correlate board. When adding a link to a board you will get a pop-up with three link display options. If you have a preferred option and you don't want to select among the link displays every time, select "Make default". You can set it by pressing "/" + L" or clicking on the "+" button and selecting Link.

When there is a URL on the board, you can see a preview of the link and a few other details, by passing the mouse over the link. The pop-up with the preview will be displayed. You can see who added the link, how many times it was viewed, and change the URL to a title. To rename the link, you can select the Change option and rename it.

Standalone links can also be visualised as Previews or Bookmarks. By clicking the dotted icon next to the item, you are able to convert the display option of the link.

2.5.3 Email item

Besides files, you can also add emails from your Gmail or Outlook integrations. You can see the email preview - when you click on the text next to the email icon, an 'Open' button will appear.

If you are the one who added the email to the board, you can also access it directly in your inbox by clicking 'Open in Gmail/Outlook' next to the close button.

2.5.4 Commenting system

Each added item can now also be marked and commented. **User can add a comments by:**

1. Clicking the comment icon on the right side of the board.
2. Adding a comment.

This way the whole item will be highlighted and commented on.

Or by:

1. Selecting the section.
2. Clicking the comment icon in the pop-up that opens.
3. Adding a comment.

This way only the selected part will be commented on. If you create multiple comments on the same selected word or item, the comments are displayed.

The commenting system also enables you to:

- tag team members or everyone in the team:
 - Create a comment and use @-sign to get all team members displayed or continue writing the first few letters of the user's name to narrow the result options.
- assign team members:
 - Owners can assign items to members. To assign others, the owner ticks the check box. The owner can assign individual members or everyone.

When someone is mentioned or assigned, they will get a notification by email and in Correlate. If they are not signed-in (online) in Correlate, the notification will appear under the bell sign.

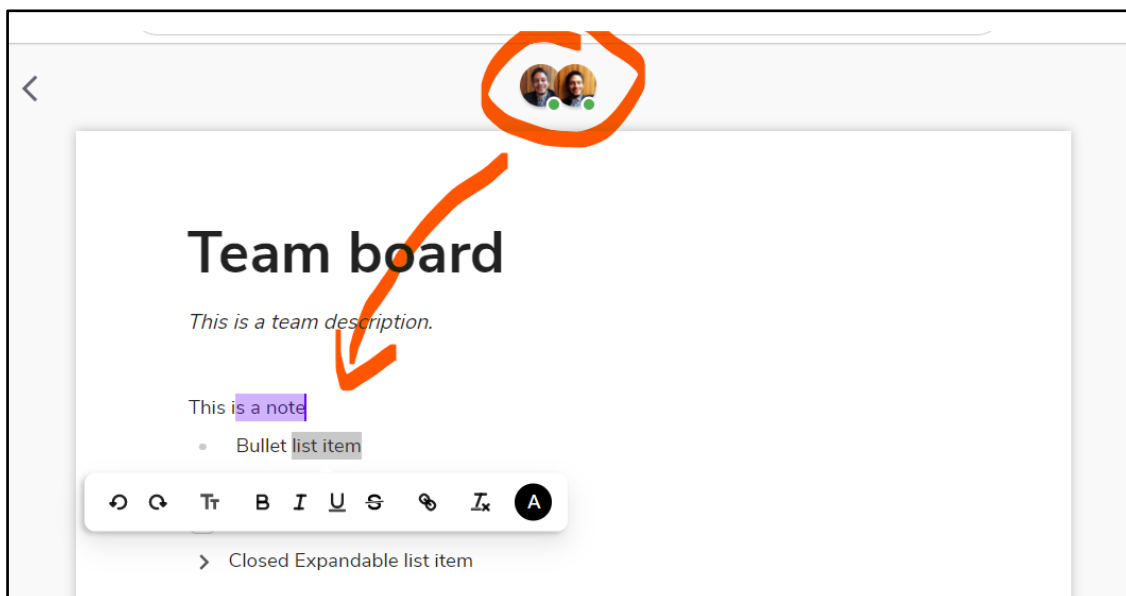
In the comment section it is also possible to:

- 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'.

2.5.5 Real time collaboration

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



2.5.6 Notifications of activity

When a user is mentioned in a **comment**, receives a **notification in Correlate**. To receive notifications of comment mentions to the email, the user needs to proactively subscribe to email forwarding. We enhanced the security - from now on you will get a notification when there is a new login to your Correlate account. By clicking on the notification or going to Settings, you can see all the active sessions and also close them.

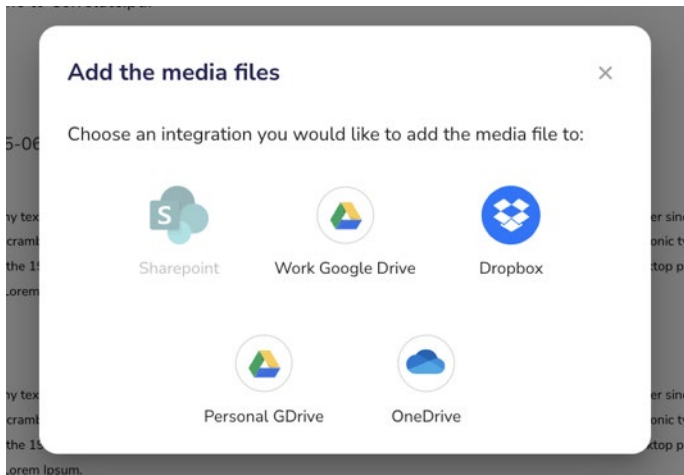
2.5.7 Duplicate a Board

Boards within a team can be duplicated by an Owner or Administrator. This is done by clicking the three dots in the right-hand corner of the board card. The Duplicate feature is also available on the board - in the top right corner, located in the three-dotted menu.

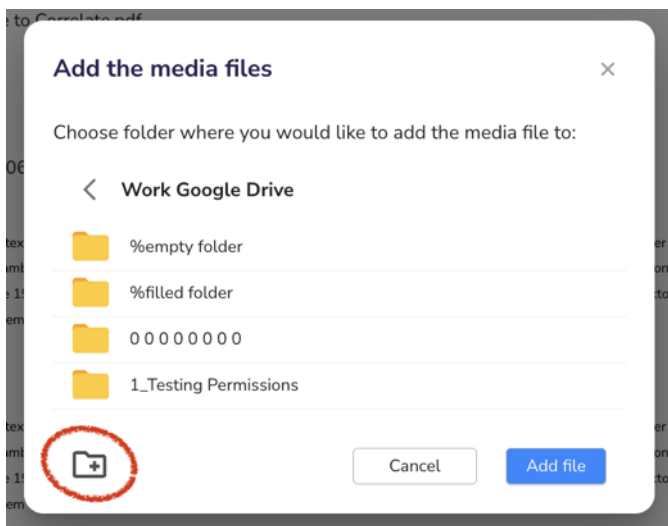
The duplication allows the user to create a board with a desired structure and **use it as a template** for new boards. This optimises procedures that repeat during project life (e.g. periodic reporting, organising periodic project meetings, collecting periodical data, etc.).

2.5.8 Add a file from the desktop to the Board

In case you want to add a file from your desktop to the board, you will first have to add it to your integration. Drag the file from Finder to the board and you will get a pop-up with all your available integrations:



Select the integration and the folder where you want to store the file. If you want to get to the sub-folders, double-click on the folder. You can also create a new folder inside the integration and store it there.



2.5.9 Copy a file to integration

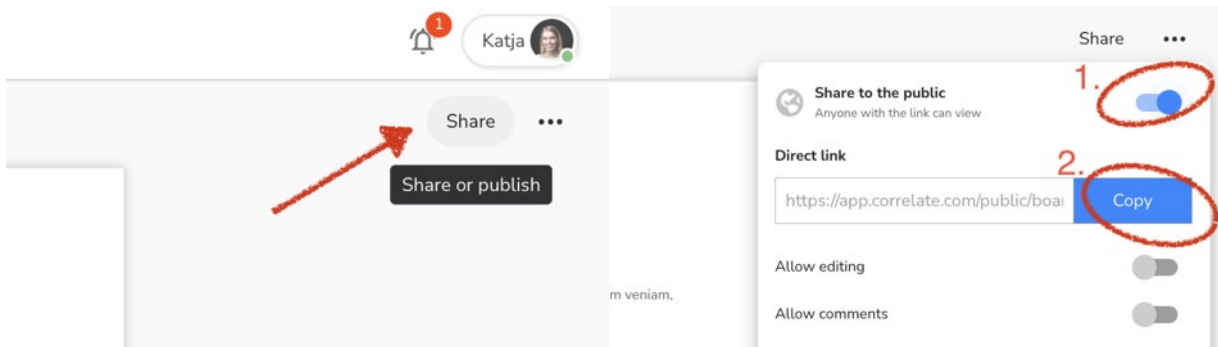
You can copy files shared in Teams to your own integrations. In preview, press 'Make a Copy' and then choose an integration in which the file should be added to.

Once the user hits 'Copy to integration', the file will be found in the integration.

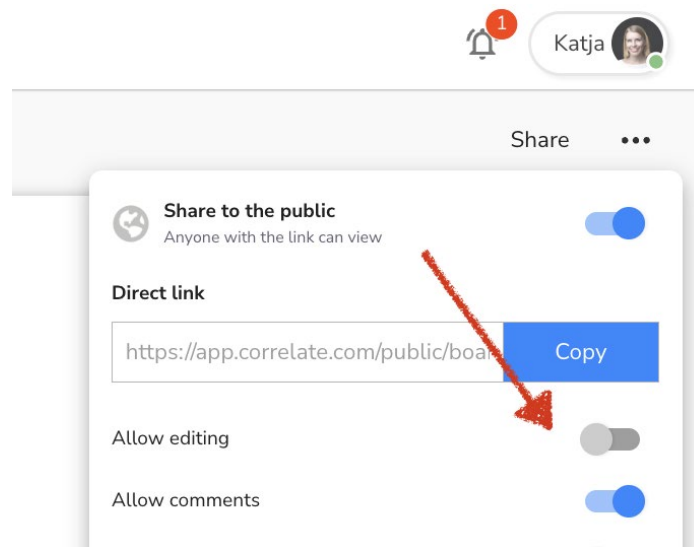
The Owner of the file will be notified that the copy was made.

2.5.10 Public Boards

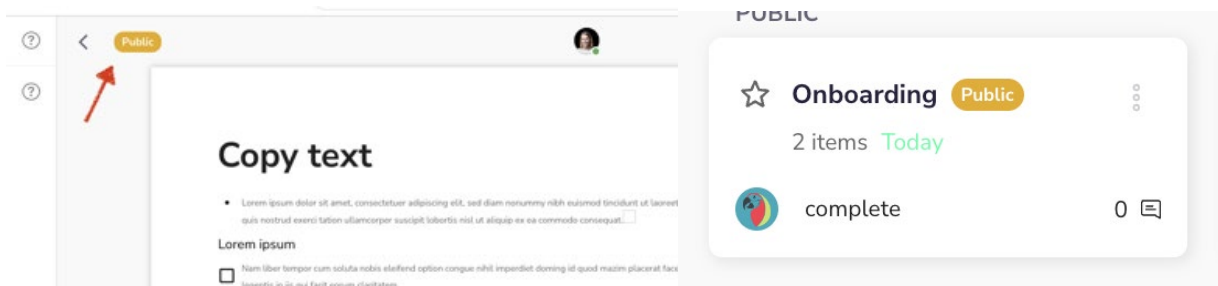
You can make a board public so that users outside the team will be able to **view boards** and **view files** within the boards. This is done through pressing the Share button in the top right corner. Turn on sharing for the board and copy the link. The link can now be shared with people outside of the team who will be able to view the content.



You can also decide if you allow editing or commenting on the board – this goes only for people who have a Correlate account. Users without a Correlate account will be able to see the board, but not edit or comment on it.

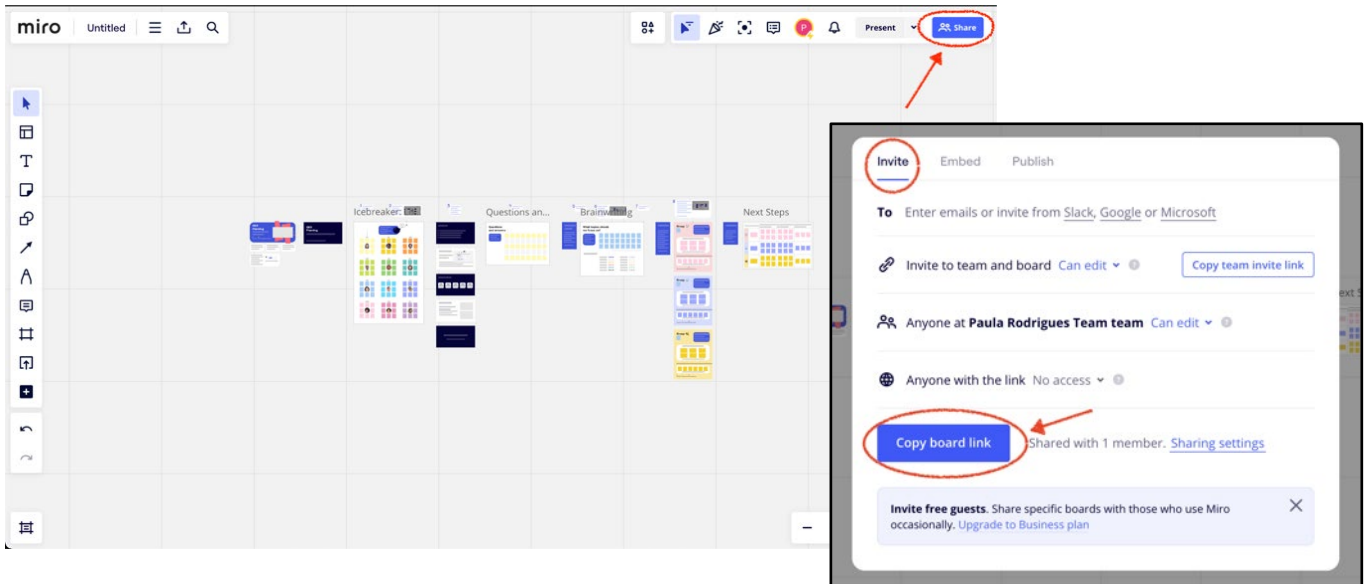


Public boards are marked with a tag.

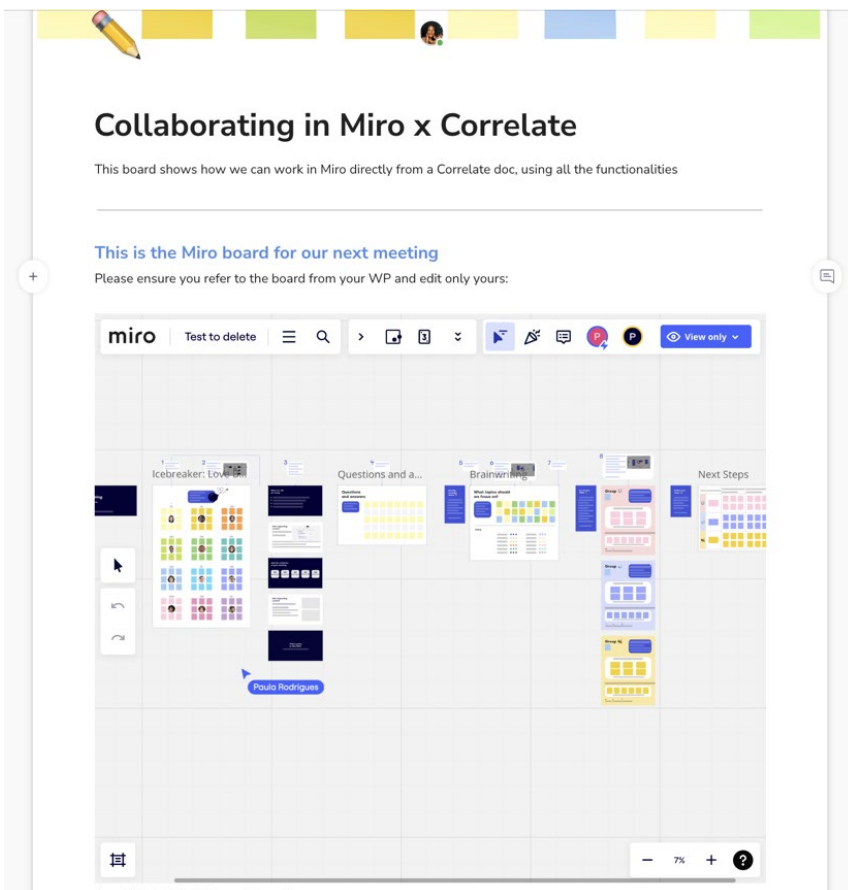


2.5.11 Embedded links from Miro

You can embed your Miro file on a Correlate board and use all the Miro functionalities. To do this, go to your Miro document first. Define the sharing permissions to make sure that you give access to the people you want. On the same button, copy the link to the file:

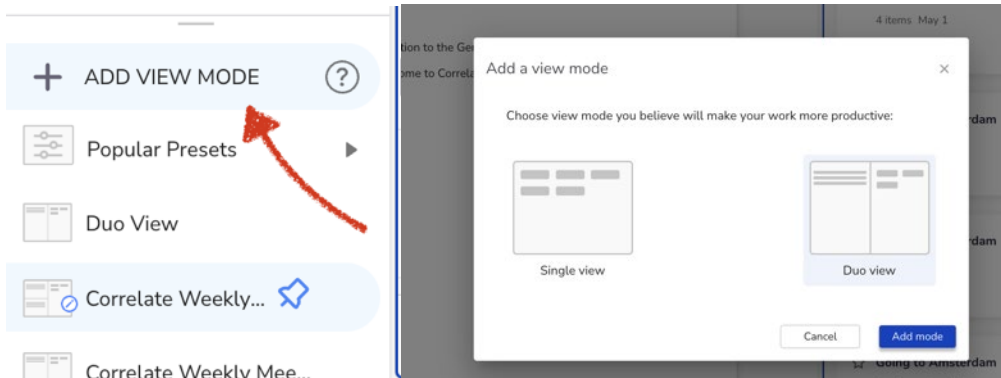


Back in Correlate, paste the Miro link and select the option 'Create preview'. You'll immediately see the Miro board and work on it directly on Correlate:



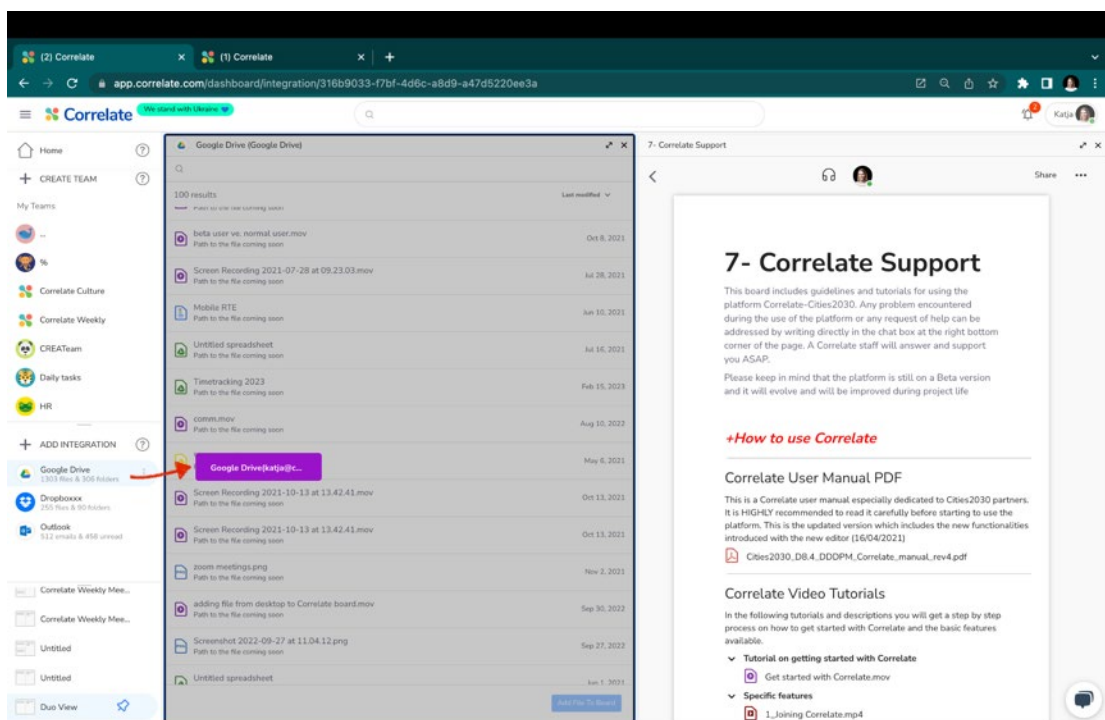
2.6 View Mode - previously Mosaic Mode

In the left menu, the user has the option to select **Single View** or **Duo View**.



After **Duo view** is created you can:

1. Click on one of two windows and click on integration, team, board or Home page.
2. Click on the selected team/integration/board, hold and drag it to the desired window.



In view mode you can:

- Expand the window.
- Drag and drop the files from integration to the board.
- Click on the top of the window and move the windows to different positions.
- Close the window.
- Add a new window by clicking on the side of the window or using hotkey.
- Make **Duo view** a default view when logging in, instead of the Home page.
 - You can do so by clicking on the three dots next to the name of the view mode.