
StratEx, PPM Easily & Affordably Documentation

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Abdelkrim Boujraf, Rudolf de Schipper, Sven Vandormael

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Contents

1	A bit of history	2
2	Guided tour	3
3	In a nutshell	4
3.1	StratEx in a nutshell	4
3.2	StratEx General concepts	7
3.3	Delivery management	10
3.4	Compatible with Office applications	14
3.5	Contractual management	15
3.6	Project Break down Structure	17
3.7	SLA Monitoring	17
3.8	Reporting and monitoring solution	18
3.9	Main advantages of StratEx	19
3.10	User Documentation	20
4	En bref	46
4.1	StratEx en bref	46
4.2	Gestion de la livraison	50
4.3	Citation and Glossary	55
5	Indices and tables	62
	Bibliography	63
	Index	64

StratEx is a web application enabling Managers to *control* the delivery using customer' *processes* enforced by *conventions shared* amongst the team members.

StratEx brings focused collaboration between business, consultancy and software development teams.

CHAPTER 1

A bit of history

In 2006, a large Project for the European Commission starts. It implies about 30 Member States willing to exchange sensitive data to protect the citizens, find stolen items like cars, trucks or boats...

The project involves many consulting companies in order to collect the business and technical requirements, develop the applications and setup the infrastructure as well as ensure a smooth quality assurance.

For that reason, E-DTM (electronic Delivery Tracking Matrix) is born (former name of StratEx).

Our team of 25 consultants had to process more than 9000 deliverables over 7 years; meaning keep track of the delivery, quality check and storage of all those deliverables including reports, white papers, business & technical analysis, acceptance & activity reports as well as the meeting minutes. We included the management of risks, contracts, payments, missions etc.

All those activities couldn't have been managed using neither spread sheets nor MS Access database. We decided to develop from scratch an application. We integrated the best practices from *PRINCE2* & *PMBOK* and created templates of documents that could be reused during the lifetime of the Project.

End of 2010, one member of the team left the company he was working for in order to create a Spin-off of the StratEx and called it StratEx for Strategy Execution to make it available to a bigger audience.

In 2013, we moved the software on the Cloud in order to reach a bigger audience.

The application has been used by an agency from the European Commission, several Spin-offs from the "Université Libre de Bruxelles" and we are talking with banks.

CHAPTER 2

Guided tour

This guided tour walks you through the steps necessary to setup a Project until its acceptance.

Note: The “Take tour” is a rather Spartan but a careful read will prove that the minimalist documentation is sufficient for most users.

Tip: Buttons “Next” and “Previous” are available at the end of each page to facilitate your journey through the documentation

The main documentation for the site is organized into a couple sections:

- *In a nutshell*
- *User Documentation*

3.1 StratEx in a nutshell

StratEx which stands for **Strategy Execution**, is a web application enabling Managers to *control* the Project delivery using customer' *processes* enforced by *conventions shared* amongst the team members.

StratEx addressing at least the following needs:

- **Contract management:**
 - How to prove that a payment claim is legitimate?
 - Do we own acceptance and activity reports to support the claims of our subcontractors?
- **Document management:**
 - Do the PMOs know the status of the deliverables?
 - Where do his/her colleagues or subcontractors have stored them?
- **Project management:**
 - Is your team aware of all the deadlines?
 - Do your team follow the internal/customer' methods & standards?

3.1.1 Customer Problem

In 2006, a huge Project for the European Commission starts. It implies 30 Countries willing to exchange sensitive data to protect the citizens; 10 consulting firms have to deliver: business & technical requirements, the software, the support, the quality assurance.

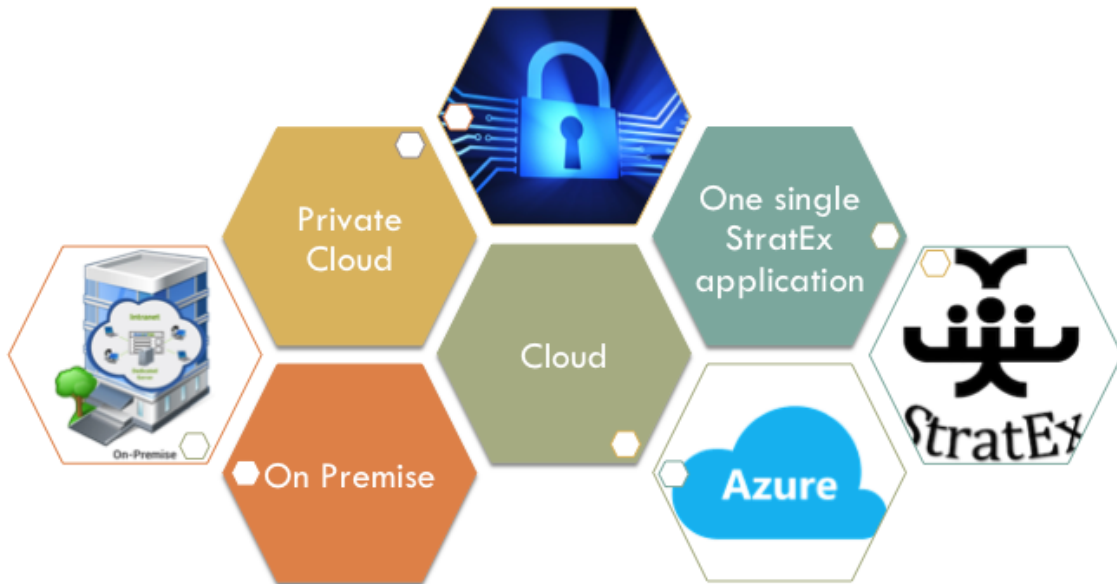
Our job: ensure a smooth quality assurance but none solutions did fit our needs: assure the quality of 9.000 deliverables over 7 years.

We decided to develop our solution: StratEx

3.1.2 Products & Services

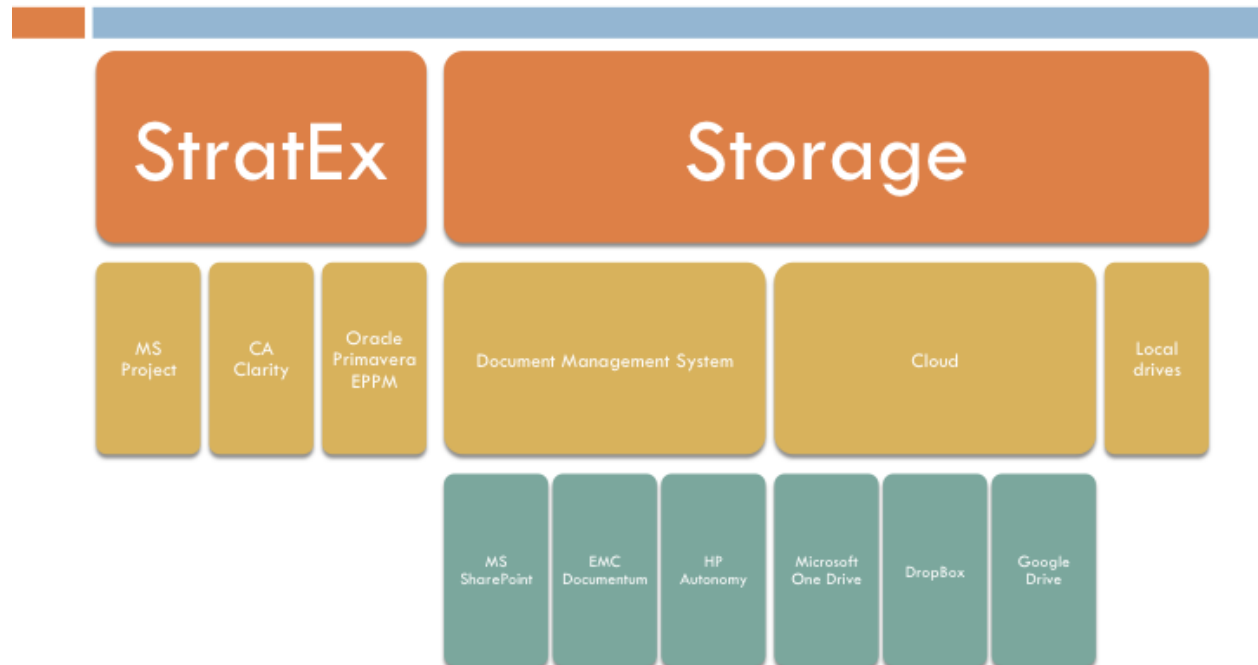
- StratEx is proposed as a *Public Cloud*, *Private Cloud* or an *On Premise* Web application.

Public-Private Cloud & On-Premise solutions



- StratEx is a perfect fit with its co-opetitors Microsoft Project, CA Clarity, Oracle Primavera EPPM and Microsoft SharePoint.
- StratEx integrate seamlessly with Document management systems like MS SharePoint, EMC Documentum, HP Autonomy
- Our users can store their data on our servers or keep their files on Microsoft One Drive, DropBox, Google Drive their NAS

A smooth integration with IT vendors



3.1.3 Public SaaS, Private SaaS and On-Premise application

Due to the aspect of our SaaS solution, customers can be located anywhere in the world.

We are focusing primarily on European based self-employed up to large firms whatever their size. That's a B2B business even if Citizens may use StratEx.

We target (A) Firms requesting grants and subsidies, (B) Firms who need to control their deliveries for legal, contractual reasons and (C) Firms delegating their PM.

3.1.4 Business model

- *Public Cloud* solution (also named *SaaS*) is based on subscription from 20 to 40 EUR per month per user
- *Private Cloud* solution is based on setup cost + subscription from 20 to 40 EUR per month per user
- *On Premise* solution is priced based on licensing fees, consulting services and three-year maintenance contracts

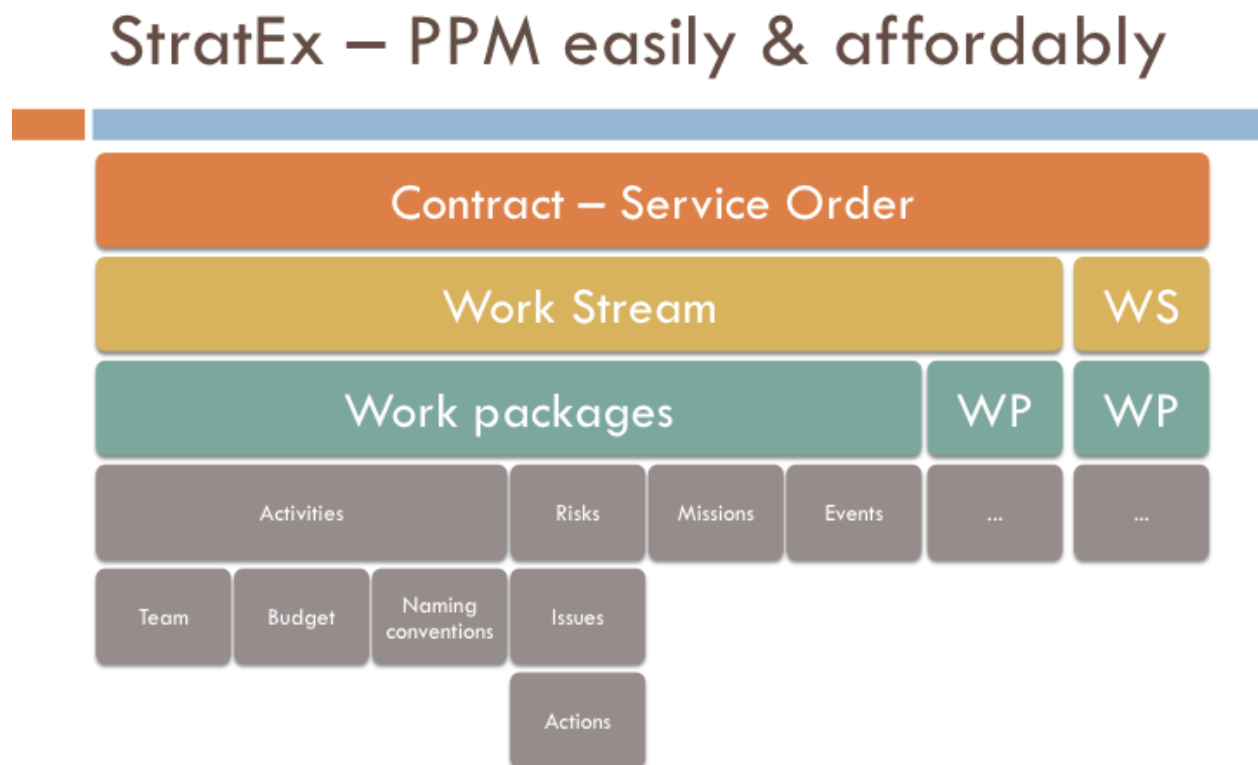
3.1.5 Competitive advantage of StratEx

- Focus on the contract
- Propose Naming conventions to ensure a smooth Document management

- Propose Directory structures which don't imply huge, costly customisation to the customer
- Propose 100+ Document templates usable as such in any kind Projects
- Provide real time Programme and Project management
- Generate reports, biggest burden of a Project manager, to her team and management board

3.1.6 Data model

Here under the hierarchical view of the StratEx data model, it describes the links between the artefacts that are produced during a Project like Work streams, Work packages, Activities, Missions etc.



3.1.7 The team

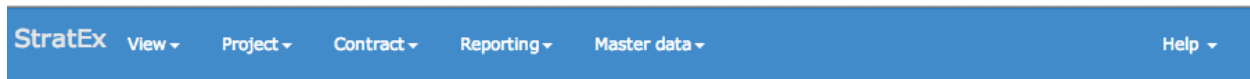
Abdelkrim Boujraf (Sales & Marketing at ALT F1), Rudolf de Schipper (Senior Project Manager at Unisys), Sven Vandormael (Project Manager at Unisys)

3.2 StratEx General concepts

The purpose of [StratEx](#) is to allow entering/maintaining data according to a specific structure to organise information, which is then easy to track back, to monitor, and to extract in view of providing a complete reporting to our clients.

3.2.1 Top menu

When you open the [StratEx](#) Home page you will notice two areas: the central screen with your planned duties and over - on top of the screen - a main menu, which provides access to any function available in StratEx. The main menu is divided in many items (Project, Contract, etc.); each item provides functions to enter/review information on a specific part of the Project structure.



Note: The first menu named “StratEx” is the name of your Project; Bear in mind that your screen may display another name

1. “StratEx” menu

1. The first menu item is your personal dashboard displaying your tasks like *deliverables*, *meetings* and *missions*

2. *View* menu

1. *Activity* menu gives access to the “deliverables” to produce.
2. *Event* stands for “meetings to attend”
3. *Mission* covers business trips/expenses management

3. *Project* menu

1. The user creates a *work breakdown structure* for each quote or service/task order; the *Project* tab makes it possible to split a contract into Work streams and Work packages

4. *Contract* menu

1. Follow your *contracts* from a new service request to a *framework contract* management via *proposal* management, quotes, task or service order monitoring. Under this tab you may also manage “*Request for action*”, whereas *risks* and *issues* may also be recorded.

5. *Reporting* menu

1. Generate a selection of *reports*, queries, and other pre-formatted reports to be sent to a Microsoft Word document with a specific template

6. *Master data* menu

1. Manager the *Master data* containing StratEx’ administrative data; people access rights, stakeholders, database calendar (for Non-working days) and jobs

7. *Help* menu

1. Describe in detail fields defining the artefacts like a *proposal* and a *request for offer*

Tip: The search functionality is valid for any of the screens in StratEx.

3.2.2 Transversal functionalities

Transversal functionalities apply the same logic in any Business Object (*Mission*, *Event*, *Risk*, *Activity*, *Issue*, *Action*)

Searching and Filtering

The logical structure behind each menu item is similar; from each item you may: get a global view on a topic with searching and filtering possibilities on all items listed on this particular tab.

#	ID	Code	Title	Owner	Start Date	End Date	Status	Evaluation Status	Earned Value (EVM) Method
Details Delete	41	WP001	WP001-Project management-Dissemination				Planned	Green	2. 50/100
Details Delete	8	WP00	WP00-Offer				Open	Green	1. 0/100
Details Delete	10	WP01	WP01-Project guidance and dissemination				Planned	Green	2. 50/100
Details Delete	11	WP02	WP02- REQUIREMENTS & ARCHITECTURE	ST Micro	01/Sep/2014	30/Nov/2016	Planned	Green	

Extracting data

After filtering data you may convert them easily into a spread sheet file (XLS), a Word document or a PDF.

Details Delete	14	WP05	WP05-Inter-cloud governance	StratEx	01/Jan/2015	30/Sep/2016	Planned	Green	
Details Delete	15	WP06	WP06-Integration and demonstrators	StratEx	01/Oct/2015	31/Dec/2016	Planned	Green	

Page 1 of 1 (8 items) Page size: 10

Export to: PDF Excel

Document Management Storage

In most screens in StratEx, you may upload a document attached to an entry (a deliverable, an offer, a contract...) so that whenever you are searching for information, the actual document/contract etc. is at your disposal just by clicking on the hyperlink. StratEx may be used as structured document management storage as well.

Attachments

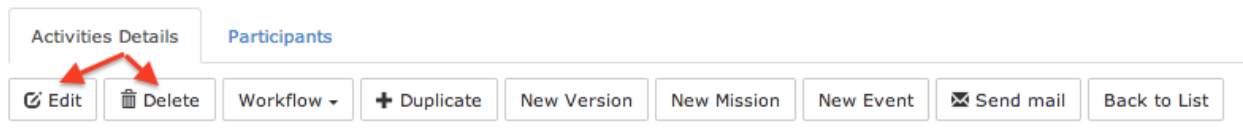
- H2020-SMEINST-1-2014-WP001-ACT-002.txt [Remove](#)

Choose File No file chosen

Upload

Edit or delete records

From any item menu, you may edit an existing document, create a new entry or delete an existing record.



3.3 Delivery management

3.3.1 “Home” your personal to-do-list

When you select the StratEx home page you will see, a central screen with “your” personal planned tasks; which might be: *deliverables* to produce, meetings to attend (called “*events*”) or *missions*, business trips you might need to organise – basically, the StratEx home page is your personal dashboard on a specific Project; your to-do-list.

My Things To Do

All My Activities

Drag a column header here to group by that column

#	New Activity Event Mission	Type	ID	Identifier	Short Note	Description	Start	End
	Details Delete	Mission	15		D0.0: Offer to Innoviris	A mission to ACME in Marseille (France) is necessary to prepare the list of artefacts to be produced for the offer	27/Feb/2014	28/Feb/2014
	Details Delete	Event	18	EVT-0012	D0.0: Offer for H2020 Programme	Decide the organisation of the team, an offer needs to be written and a definition of the required artefacts is necessary to answer to the RD1 issued by Innoviris.	01/Mar/2014	31/Mar/2014
	Details Delete	Risk	22	Risk/Issue/Action	Quality of results or work of partners is not sufficient to be of use	Assist to keep strict quality control and management in the project	14/May/2014	14/May/2014
	Details Delete	Activity	1088	IncSTi-WP01-ACT-001	D1.1bb: Half-yearly ITEA2 progress reports	D1.1bb: Half-yearly ITEA2 progress reports	01/Jul/2014	25/Jul/2014
	Details Delete	Issue	1	Risk/Issue/Action	a title	a description	13/Jul/2014	13/Jul/2014
	Details Delete	Action	28	Risk/Issue/Action	Collect the balance sheet of StratEx	We need the balance sheet figures of StratEx to request H2020 funding	19/Aug/2014	19/Aug/2014

StratEx promotes efficiency as well as teamwork. Indeed in order to keep things in proper order, to compile reliable information it must be processed at the source. Each operator enters and reviews his/her own activities in the database.

Project management Office or PMO (Project Management Office) and consultants all work with and around StratEx. Once a consultant gets his/her access rights set up, he/she may access the tool directly via an Internet or Intranet

hyperlink.

Important: At any time StratEx provides an accurate picture of all activities on the Project.

As much as the personal dashboard might be useful, it is however still necessary to be able to get a global view on the Project and to seek information from a broader source. For delivery management this may be done through the [View > Activity](#) or [View > Event](#) or [View > Mission](#) screens.

3.3.2 Activity – Deliverables Management

When you select the “Activity” tab, a list is populated with all the activities recorded on your Project.

List of Activities

Create New

Drag a column header here to group by that column

#		ID	Short Note	Contractual	Activity Identifier	Version	Status	Planned Start date	Planned End date	Actual End date
Clear										
			d1.1							
	Details Delete	1088	D1.1bb: Half-yearly ITEA2 progress reports	<input checked="" type="checkbox"/>	IncSTI-WP01-ACT-001	1.10	Open	01/Jul/2014	25/Jul/2014	
	Details Delete	88	D1.1b: Half-yearly ITEA2 progress reports	<input type="checkbox"/>	InCloudInG-StiConsult-WP01-ACT-001	1.10	Deprecated			
	Details Delete	28	D1.1d: Half-yearly ITEA2 progress reports	<input type="checkbox"/>	ITEA2_InCloudInG_13047-WP01-ACT-005	1.00	Open	01/Jan/2016	30/Jun/2016	
	Details Delete	27	D1.1c: Half-yearly ITEA2 progress reports	<input type="checkbox"/>	ITEA2_InCloudInG_13047-WP01-ACT-004	1.00	Open	01/Jul/2015	31/Dec/2015	
	Details Delete	26	D1.1b: Half-yearly ITEA2 progress reports	<input type="checkbox"/>	InCloudInG-StiConsult-WP01-ACT-001	1.00	Open	01/Jan/2015	30/Jun/2015	
	Details Delete	25	D1.1a: Half-yearly ITEA2 progress reports	<input type="checkbox"/>	ITEA2_InCloudInG_13047-WP01-ACT-002	1.00	Open	01/Jul/2014	31/Dec/2014	

Page 1 of 1 (6 items) Page size: 10

Export to: [PDF](#) [Excel](#)

When you select the “details” option, a new screen shows up where you can edit your item. If you prefer to create a complete new item from scratch you should select the command “create new” from the main “Activity” window.

Edit Activities

Workpackage *

ITEA3 StratEx

IncSTi Inter-cloud identity governance

WS01-InCloudInG

WP01-Project guidance and dissemination

Short Note *

D1.1bb: Half-yearly ITEA2 progress reports

Description

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D1.1bb: Half-yearly ITEA2 progress reports

Design

Preview

▼ Need Help?

An activity results in specific outputs, which are the products, services, activities, or attributes resulting from the activities and linked to the objectives (e.g. project management plan, state of the art study, test cases, dissemination artefacts).

- Workpackage:** The Workpackage this activity belongs to.
- Short Note:** A short description of the activity such as the Title of a document to be produced.
- Description:** Full, textual description of the Activity that will support the participants to understand its scope.
- Contractual:** Check if this is a contractual deliverable.
NOTE: First save the Activity before selecting a payment
- Activity Identifier:** Prefix used for activities is: [contract code]-[WP act id][activity type]-[number]. The field is automatically filled in upon save of the Activity. Use 'auto-filled' to regenerate the Identifier
- Version for review:** The version of the item that is to be reviewed.
- Owner:** Organisation/Company/Institution responsible for the follow-up of the Activity, e.g.: Your company, your client...
If the correct organisation does not appear in the list, it can be added to the Stakeholders (MasterData/Stakeholders).

For more information, click [here](#)
To watch the online tutorial, click [here](#)

3.3.3 Naming conventions

Activities to produce are entered in the StratEx following a so-called “naming convention” which makes it easy to identify each action performed under a specific contract or service.

It is true for Activities but also for Events, for any item recorded in StratEx which is related to a contract. Thanks to this particular and UNIQUE ID (unique identifier), it is possible to clearly identify any task performed on the Project.

This is the basic principal under all the reporting done by StratEx. It will also provide guidance to each consultant on the way to name their deliverables/documents and will harmonize communication basis for all the consultants working on a same Project.

Each document or file thanks to this UNIQUE ID will be suitable for tracking. StratEx supports and provides the requested identifiers.

Note: Example of naming convention: *PROJ-C-SC01-REP-001-1.00_Report_April_2014.doc*

12

Chapter 3. In a nutshell

Table 1: Meaning of the naming convention

Code	Meaning
PROJ	Project Framework contract
C	Common (the middle letter allows sub-grouping within a framework contract)
SC01	Specific Contract 01
REP	Document type (here a Report)
001	Sequence (first report of a series)
1.00	Version

Note: Activities and events screens are built up on a very similar structure; however an event may be relevant to several attendees working on various service orders. Activities may only be related to one service order. This is the main difference between the two and the reason why it was decided to use a more generic naming convention used for events.

Important: In order to keep track and a close crosschecking between delivery and contract, a deliverable may be marked as “contractual” when it is linked to a payment. This way a Project manager will know when he has met his contractual obligations.

Tip: Here is a proposal for naming conventions for your Projects

StratEx - Document Naming Conventions

StratEx-soXX-001-I-RPT-1.00-
Doc explicit short Description

ID: StratEx-soXX-001-I-COD

File: StratEx-soXX-002-I-RPT-1.00-UC_Manage Application Mapping Diagram.doc

File: StratEx-soXX-003-I-MTG-2011-10-31-14h30-15h00-status meeting.doc

StratEx-so00-XXX-X-NNN-V.VV_Free description.filext

Contract	
StratEx	PPM Easily & Affordably
soXX	Service order N°
001	Sequence N°
File type	
C	Common
I	Internal
A	Action
T	Template

DOC Type	
AR	Acceptance Report
MTG	Meeting Minutes
MSC	Miscellaneous
RPT	Report, Deliverable
COD	Source code
LNK	Link, URL
PRC	Procedure
SAL	Sales
File version	
1.00	By ID
2011-10-31	By date YYYY-MM-DD

Legend

C-Common: General documents (e.g. organization chart, acronyms...)

I-Internal: Document **NOT** to deliver to external actors

A-Action: List of actions

T-Template: template of a document to use independently of the project

Note: StratEx has been build to facilitate its usage by any team member, we hope that the tool is intuitive and self-explanatory; Please do [share your thought](#) with us at any time.

3.4 Compatible with Office applications

StratEx is compatible with modern technology, mobile solutions and connects easily with Microsoft and Google office apps. From StratEx it is quite easily to forward information to your calendar, tasks or emails, once you synchronise your pc or laptop with your mobile phone, your outlook agenda is up-to-date with StratEx.

Usually a team member will enter a new meeting, an activity or a new mission in StratEx. As this information might be relevant to multiple participants, he/she will send this information to him/herself or to colleagues to update his/her Outlook calendar via a meeting request, a task or email carrying information extracted from StratEx.

3.4.1 Meeting request made with the Calendar of Microsoft Outlook

To...			
Subject:	EVT-1120 -- Meeting at client's		
Location:	Brussels		
Start time:	Mon 11/06/2012 ▼	14:00 ▼	<input type="checkbox"/> All day event
End time:	Mon 11/06/2012 ▼	15:00 ▼	

Meeting at client's

Link to the event: [link](#) to event EVT-001 in e-DTM

Dear colleagues,

Please attend the meeting enclosed as per e-DTM.
Accept this request to update your outlook calendar!

Kind regards,

Planning Manager.

3.4.2 Meeting request made with Mail client of Microsoft Outlook

From...	
To...	
Cc...	
Bcc...	
Subject:	Mission to Paris : PROJ-C-SC03-EXP-001 requested

Dear Client,

Could you please authorize the expenses related to this new mission?

Many thanks in advance!

As per details below:

Mission Request:	PROJ-SC03-EXP-001	v0.01
Name:	Name of consultant	
Mission Starts:	20/Jun/2012	
Mission Ends:	21/Jun/2012	
Contract N°:	Framework contract client	
Service Order:	PROJ-C-SC03 contract's name	
Purpose of trip:	Mission to Paris	
Contact at Client's	Client's name	TOTAL
First day trip:	1	EUR 300.00
Additional day(s)	2	EUR 200.00
		EUR 700.00
Travel Expenses Budget:	EUR 1.500,00	
Already Used Budget:	EUR 0.00	

3.5 Contractual management

Contract management or contract administration is the management of contracts made with customers, vendors, partners, or employees. The personnel involved in Contract Administration required to negotiate, support and manage effective contracts are expensive to train and retain.

Contract management includes negotiating the terms and conditions in contracts and ensuring compliance with the terms and conditions, as well as documenting and agreeing on any changes or amendments that may arise during its implementation or execution. It can be summarized as the process of systematically and efficiently managing contract creation, execution, and analysis for the purpose of maximizing financial and operational performance and minimizing risk. [[ContractManagementWikipedia](#)]


3.5.1 Contractual/Budget follow-up

StratEx makes it possible to monitor all the contractual and financial aspects of a Project. In the contract section you may find a menu to enter "new request for service" followed by the creation of a proposal.

Proposals Details

No messages

Proposals Details

[Payment Terms](#) Edit Delete Submit proposal

Create New version

Create Contract

Cancel Proposal

Back to List

ID 64

Request For Offer [Horizon 2020 dedicated SME Instrument - Phase 2 2014](#)

Title H2020 StratEx, the next Level

Description

Contract description

Specific Challenge: The challenge is to provide support to a large set of early stage high risk innovative SMEs in the ICT sector. Focus will be on SME proposing innovative ICT concept, product and service applying new sets of rules, values and models which ultimately disrupt existing markets.

Acronyms

Acronym	Description
ODI	Open Disruptive Innovation Scheme

Links

<http://ec.europa.eu/research/h2020/topics/2538-ict-37-2014-1.html>

Proposal code H2020 StratEx

Version 1.00

Submission date 17/Dec/2014

Value € 1,225,000.00

Cost budget € 1,750,000.00

Expense budget € 185,000.00

Delta Proposal ☐

Status Planned

Proposed By [ALT-F1](#)

Contract date 03/Feb/2015

Staff (person-days consumption) or payment/instalment information are part of the contract entry for a better follow-up of our obligation towards our clients

Once the client has accepted the proposal, a new service order is sent to the Project manager. The data related to this new service will be entered in StratEx as shown below; actually most of the information is already in the system as the new service has been already described in the proposal. This information is copied to the next level of the process into a new contract or service order.

Contracts Details

No messages

Contracts Details Fixed Price Detail Payments

Project [StratEx Demo](#)

ID 1055

Code H2020-SMEINST-1-2014

Title Open Disruptive Innovation Scheme

Description

Contract description

Specific Challenge: The challenge is to provide support to a large set of early stage high risk innovative SMEs in the ICT sector. Focus will be on SME proposing innovative ICT concept, product and service applying new sets of rules, values and models which ultimately disrupt existing markets.

Acronyms

Acronym	Description
ODI	Open Disruptive Innovation Scheme

Links

<http://ec.europa.eu/research/h2020/topics/2538-ict-37-2014-1.html>

Parent contract

Is Frame Contract

Proposal

Type 0 - Fixed Price

Startdate 03/Mar/2015

Enddate 02/Mar/2018

Value € 1,750,000.00

Cost budget € 2,500,000.00

Expense budget € 150,000.00

Status Planned

Owner [ALT-F1](#)

Last change

Change Log

20/Aug/2014 (ABOInclounging)	- setup H2020 contract metadata
22/Aug/2014 (ABOInclounging)	- reduce size of text inside the description
22/Aug/2014 (ABOInclounging)	- reduce size of text

3.6 Project Break down Structure

In the “Project” tab, the StratEx manager may build up a break down structure to split a service/task order or a Quote in first: Work streams (WS) then into Work packages (WP). Each Work stream may have several Work packages. This break down structure is very useful to organise and plan work, to insert time limits for each Work package for example. Also this organised work down structure is very helpful to sort information in view of a complete reporting.

3.7 SLA Monitoring

Information related to SLA monitoring may be stored in StratEx. It is often part of the contract information. For example the staff or the consumption of budget on a Project is added in a sub-part of the contract section. This section will be updated overtime to reflect the team working on a specific service as well as the “persons-days” sold and consumed by each resource. This information will flow on request into the SLA monitoring.

Contracts Details

No messages

Contracts Details	Fixed Price Detail	Payments
-------------------	--------------------	----------

Drag a column header here to group by that column

#	Project Manager	Subcontractor	Status	Start date
Edit New Delete	Jim Johnson	no	1 - Started	19/Aug/2014
Edit New Delete	Peter James	yes	5 - Known issues	20/Aug/2014
Edit New Delete	Martin Gates	no	2 - Finished	04/Aug/2014

Page 1 of 1 (3 items) ⏪ ⏩ 1 ⏪ ⏩ Page size: 10

SLA can take various forms, however as a default value StratEx can already provide a range of SLA measurements; Request for actions, Risks or Issues... This topic will be further explained in the reporting section.

3.8 Reporting and monitoring solution

StratEx has great functionalities for filtering and reporting information. This functionality is available for any screen as shown in the introduction but also you may set up queries in order to customise specific reports cross matching information available from the StratEx database.

List of Reports

Drag a column header here to group by that column

#		ID	Short Name
	Run	3	Outstanding activities (weekly view)
	Run	2	Outstanding events (weekly view)
	Run	1	Deliverables in Slippage (weekly view)

Page 1 of 1 (3 items) ⏪ ⏩ 1 ⏪ ⏩ Page size: 20

Reports are easy to extract thanks to the filtering functionalities as well as the export feature into XLS, PDF or Word.

	A	B	C	D	E	F	G	H	I	J	K
1	Outstanding activities (weekly view)										
3	ID	Week	Contract	ActivityIdentifier	Version	Shortnote		Planned startdate	Planned enddate	Name	Note
4	88		Horizon 2020 - ODI	H2020-WP01-ACT-001	1.10	D1.1b: Half-yearly ITEA2 progress reports				Abdelkrim BOUJRAF	Business requirement collector
5	88		Horizon 2020 - ODI	H2020-WP01-ACT-001	1.10	D1.1b: Half-yearly ITEA2 progress reports				Sven VD	Business writer
6	1088	2014-27	Horizon 2020 - ODI	StratEx-WP01-ACT-001	1.10	D1.1bb: Half-yearly ITEA2 progress reports		01/07/2014	25/07/2014	Abdelkrim BOUJRAF	Business requirement collector
7	1088	2014-27	Horizon 2020 - ODI	StratEx-WP01-ACT-001	1.10	D1.1bb: Half-yearly ITEA2 progress reports		01/07/2014	25/07/2014	Rudolf DS	Business writer
8	25	2014-27	Horizon 2020 - ODI	H2020_StratEx_13047-WP01-ACT-002	1.00	D1.1a: Half-yearly ITEA2 progress reports		01/07/2014	31/12/2014	Sven VD	Business writer

We recommend that you take a look at the [Monthly Progress Report](#) in PDF, to view how StratEx may display information into a formal report; this document will include the SLA reporting as well.

Create Word report

Report *

Monthly Progress Report

Start Date *

01/Jul/2014

End Date *

31/Jul/2014

In case you selected a report for a specific contract, please select the related contract.

Contract

ITEA3 StratEx

IncSTi Inter-cloud identity governance

Format

Word

PDF

Create Report

For closer monitoring purposes on the Project, StratEx is able to generate reports automatically on a daily/weekly/monthly schedule. Each assignee will receive a reminder for a greater respect of deadlines.

3.9 Main advantages of StratEx

Better global Overview on the Project: The StratEx provides a comprehensive and global picture of the Project from the deliverables as well as the financial/contractual point of view.

Efficiency to maintain the central repository: One single place to store information Increased information reliability: In addition, the automatically generated Monthly Progress Report or Activity Report is quick and efficient. Thanks to StratEx our reports are less error-prone and therefore this ensures quality as well as efficiency in the process of report drafting and delivery.

User friendliness and accessibility over the Internet, anywhere, anytime: As the StratEx is easily accessible over the Internet, any authorised team member or business partner can connect to this tool to enter or review information on the deliverable(s) under his/her responsibility. This provides cohesion and consistency. Even consultants working remotely can access and use the tool to enter information, follow their planning and update their tasks based on the work performed.

Secure and Protected Access: Only authorised Unisys members or business partners are granted access to this tool, which is hosted in Unisys protected servers' environment.

Reinforced responsibility at deliverable owner level: With StratEx being accessible from the Intranet, team members are responsible for their own part of the work and they know best what they are handling themselves. This means that there is a better coverage of persons' activities on the Project and this also ensures that information stored in the database is complete and up-to-date.

Naming Convention reinforced by the use of the StratEx: The StratEx has also reinforced our Deliverable Classification/Organization, and Naming Convention. How? Each time a document is delivered or attached to an email, an entry is made in the StratEx, which automatically provides a unique identifier to name our documents. This also means that every performed deliverables has a unique tracking number.

A better-organised Project, through better structured repositories: Now that it is easier to record data in the StratEx, the team is no longer burdened by administrative processes and editing deliverables according to the naming convention. This is a guarantee for a more reliable and consistent information in our activities reports but also in our repositories when looking for information. As documents are correctly named, they are easier to trace, which leads to a better organised Project.

Extracting information is easy with StratEx: The tool is extremely user friendly when it comes to filtering information. Out of the database, you may select information as shown in the search on all Specific Contracts from the start of the Framework Contract and export them into various formats (XLS, PDF and Word). Having already used the StratEx during the course of other major Projects, our team is already familiar using the tool that supports and facilitates our reporting activities for our services.

Document Management Storage: With StratEx your document may be stored as a hyperlink together with a recorded entry. A very convenient and efficient way to find your documents back.

3.10 User Documentation

3.10.1 Setup a new account

To profit from StratEx you need to setup a personal account.

Setup a new account

Learn how to setup a new account.

<https://www.stratexapp.com/Account/CreateNewAccount>

1. **Open the StratEx web application**
 - <https://www.stratexapp.com>
2. **Click on Sign up to setup a new account:**
 - open the Sign up page <https://www.stratexapp.com/Account/CreateNewAccount>
 - fill the form
 - click on Create account
3. An email is sent to the address you have mentioned earlier
4. Click on the link inside the email to activate your account
5. Set your password to access StratEx in the future
6. That's it you can now login into StratEx and setup your Project

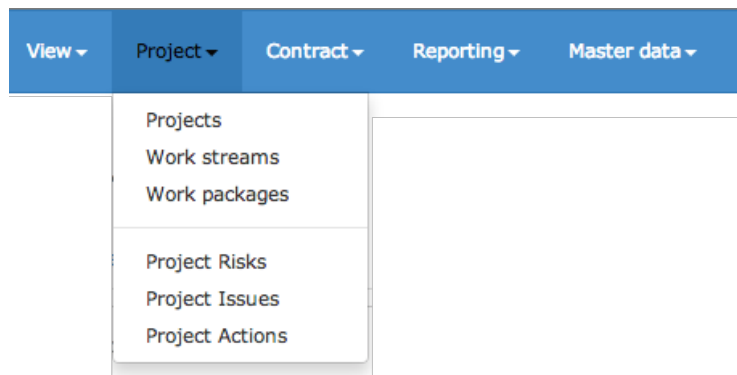
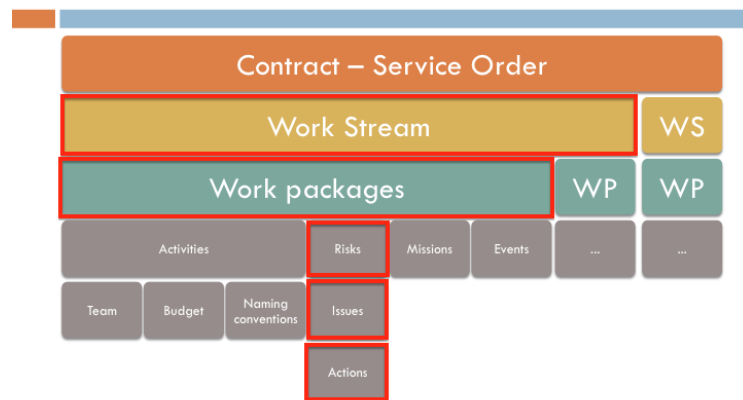
3.10.2 Project menu

The Project menu allows you to setup several high-level artefacts of your *Project*, *Work stream*, *Work package*, *Risk*, *Issue* and *Action*

Project menu bar

Manage a *Project*, *Work stream*, *Work package*, *Risk*, *Issue* and *Action*

StratEx – PPM easily & affordably



3.10.3 Project > Projects

Display the Projects you are allowed to work on. <https://www.stratexapp.com/Project>

List of Projects

Create New

Drag a column header here to group by that column

#		ID	Name	Active
	Details Delete	4099	StratEx Demo	✓
	Details Delete	4098	StratEx Demo for Bank	✓
	Details Delete	2024	ITEA3 StratEx	✓

Page 1 of 1 (3 items)

Page size: 10

Export to: PDF Excel

Project details

Access the detailed information about your Project such as the name, the non-working days, the email addresses to use to interact with the stakeholders.

Click on Details to access the Project details

1. Open <https://www.stratexapp.com/Project>
2. Click on **Details**

ITEA2 StratEx View Project Contract Reporting Master data

Projects Details

No messages

Projects Details Non-working Days Activity Type Job Scheduler Risk / Issue Type

Edit Delete Gantt Back to List

ID	4099
Name	StratEx Demo
Active	✓
eMail from address	StratExDemo+from@stratexapp.com
eMail CC address	StratExDemo+CC@stratexapp.com
eMail Mission to address	StratExDemo+MissionTo@stratexapp.com
eMail Request Offer to address	StratExDemo+RequestForOffer@stratexapp.com
eMail Signature	--- Abdelkrim BOUJRAF www.stratexapp.com , PMO easily & affordably - +32 497 480.970 Blog Twitter Linkedin Facebook Google+ - Proudly made in Belgium

Create a new Project

Hint: The data model of a Project is described here <https://www.stratexapp.com/help/Project.htm>

Manage a Project

- **Create** a project: <https://www.stratexapp.com/Project/Create>
 - **Manage** the projects: <https://www.stratexapp.com/Project>
-

Non-working days

Set the *Non-working days* and holidays for a Project. Those days will not be taken into account when displaying the planning.

Hint: The data model of a Non-working day is described here <https://www.stratexapp.com/help/Project.htm>

Manage the Non-working days of a specified Project

1. <https://www.stratexapp.com/Project>
 2. Click on **Details**
 3. Click on **Non-Working days** tab
-

Activity type

They are several types of *activities* that we can produce during a Project. The activities types' list will be used when the manager will set the type of artefacts to be produced during the Project. Those artefacts will be identified by their abbreviation in their file names. e.g. H2020-WP00-**RPT**-001 (see *Naming conventions*)

Hint: The data model of an Activity type is described here <https://www.stratexapp.com/help/Project.htm>

Set the Activity type of a specified Project

1. <https://www.stratexapp.com/Project>
 2. Click on **Details**
 3. Click on **Activity type** tab
-

Table 2: Example of Activity types including their abbreviation

Abbreviation	Meaning
ACT	Progress report
MTG	Meeting minutes
RPT	Report
ACC	Acceptance report
EVT	Event, Meeting, Kick-off

Job scheduler

Reports can be automatically sent by email to a specified audience at their best convenience. The manager can generate a report including any data stored in the StratEx database such as *Project*, *Work package*, *Work stream*, *risk*, *action*, *contract*, *request for offer*, *proposal* ...

Hint: The data model of a Job scheduler is described here <https://www.stratexapp.com/help/Project.htm>

Set the Job scheduler of a specified Project

1. <https://www.stratexapp.com/Project>
2. Click on **Details**
3. Click on **Job scheduler** tab

The screenshot shows the 'Job Scheduler' tab in the StratEx application. At the top, there are tabs for 'Projects Details', 'Non-working Days', 'Activity Type', 'Job Scheduler', and 'Risk / Issue Type'. Below the tabs, a message says 'Drag a column header here to group by that column'. The main area contains a table with columns: '#', 'Name', 'Frequency', 'Enabled', and 'Next Execution'. Below the table, there are several input fields and checkboxes. On the left, there is a 'Name *' field with a rich text editor below it. Below the editor is an 'eMail Template *' field with 'Design' and 'Preview' tabs. To the right of the email template is a 'Frequency' dropdown menu. Below the email template are checkboxes for 'Enabled', 'Monday', 'Wednesday', 'Friday', and 'Sunday'. To the right of these are checkboxes for 'Tuesday', 'Thursday', and 'Saturday'. At the bottom right, there is a 'Next Execution *' dropdown menu and a 'Save Cancel' button. At the very bottom, there is a page indicator 'Page 1 of 0 (0 items)' and a 'Page size: 10' dropdown.

Risk / Issue Type

They are several types of *Risks* or *Issues* that a manager and her team should take into account during a Project. Those risks should be identified ex-ante and trigger several questions; the nature of those risks may need a different kind of mitigation plan in order to

The manager and her team should ask those questions to themselves when they plan to set the risk types:

- What could potentially go wrong?
- What could the team do (or plan to do) that would reduce the effects of these threats on the Project?
- What potential opportunities could occur?
- What could the team do to enhance the effects of these opportunities on the Project?

Hint: The data model of a Risk type is described here <https://www.stratexapp.com/help/Project.htm>

Manage the Risk types of a specified Project

1. <https://www.stratexapp.com/Project>
2. Click on **Details**
3. Click on **Risk / Issue type** tab

3.10.4 Project > Work streams

Each contract is made of 1 to several *Work streams* (WS); a Work stream defines high-level Project steps (e.g. Answering to the call for tender, Participate to the H2020 Project, Provide long term support after the participation to H2020 Project)

Hint: The data model of a Work stream is described here <https://www.stratexapp.com/help/Workstream.htm>

Manage a Work stream for a specific Project

- **Create** a Work stream: <https://www.stratexapp.com/Workstream/Create>
- **Manage** the Work streams: <https://www.stratexapp.com/Workstream/>

3.10.5 Project > Work packages

A *Work stream* is made 1 to several *Work packages* (WP), a building block of the *work breakdown structure* that allows the Project manager to define the steps necessary for completion of the work. (e.g. Program management, Production Control Software, Testing, Deployment, Dissemination).

Note: *Risks* can be associated to the Work packages.

Hint: The data model of a Work package is described here <https://www.stratexapp.com/help/Workpackage.htm>

Manage a Work package for a specific Work stream

- **Create** a Work package: <https://www.stratexapp.com/Workpackage/Create>
- **Manage** the Work packages: <https://www.stratexapp.com/Workpackage/>

3.10.6 Project > Project risks

A *Project* is subject to constant change in its business and wider environment. The risk environment (Project *risk*) is constantly changing too. The Project's priorities and relative importance of risks will shift and change. Assumptions about risk have to be regularly revisited and reconsidered, for example at each end stage assessment. [PRINCE2Revealed]

Project *risk probability* is the evaluated likelihood of a particular outcome actually happening (including a consideration of the frequency with which the outcome may arise).

The *risk impact* is the evaluated effect or result of a particular outcome actually happening.

Hint: PRINCE2 recognizes 3 types of issues: *request for change*, *off-specification*, and a *problem/concern*. The Project manager is free to setup other types of issues depending on its business.

Hint: If one risk is “realized”, it becomes an *issue*. (See *Project > Project Issues*)

Hint: The data model of a risk is described here <https://www.stratexapp.com/help/Risk.htm>

Assign a Risk to a Work package

- **Create** a Risk: <https://www.stratexapp.com/Risk/Create>
- **Manage** the Risks: <https://www.stratexapp.com/Risk>

Assign an Action to a Risk

Actions may be setup for each *Risk* in order to mitigate the risk as much as possible. For example, one can setup regular reviews of an activity to ensure that this activity is duly taken care of and that the customer won’t find obvious mistakes during the *User Acceptance Test*.

Hint: The data model of a Project is described here <https://www.stratexapp.com/help/Action.htm>

Manage an Action to mitigate the Risk realization

1. Open <https://www.stratexapp.com/Risk/>
2. Click on **Details**
3. Click on **Actions for the risk**

3.10.7 Project > Project Issues

An *Issue* is created when a *Risk* is realized; an Issue is a term used to cover any *problem/concern*, query, *Request for Change*, suggestion or *Off-Specification* raised during the Project. They can be about anything to do with the Project.

Hint: The data model of an Issue is described here <https://www.stratexapp.com/help/Issue.htm>

Manage an Action to cover a Risk realization

- **Create** an Issue: <https://www.stratexapp.com/Issue/Create>
- **Manage** an Issue: <https://www.stratexapp.com/Issue/>

Assign an Action to an Issue

Actions may be setup for each *Issue* to ensure that the Issue is closed in a timely manner.

Hint: The data model of an Action is described here <https://www.stratexapp.com/help/Action.htm>

Manage an Action to close an Issue in a timely manner

1. Open <https://www.stratexapp.com/Issue/>
2. Click on **Details**
3. Click on **Actions for the issue**

3.10.8 Project > Project Actions

Actions may be linked to one *Work package*. Those actions are not term:*deliverables* and are not meant to produce value for your Project (such as *activities*). They represent acts that people or stakeholders need to perform to make the Project reach its objectives.

Such actions may be a *corrective action*, a *follow-on action recommendations*, a *procedure* ...

Hint: The data model of an action is described here <https://www.stratexapp.com/help/Action.htm>

Manage the Actions for a specific Work package

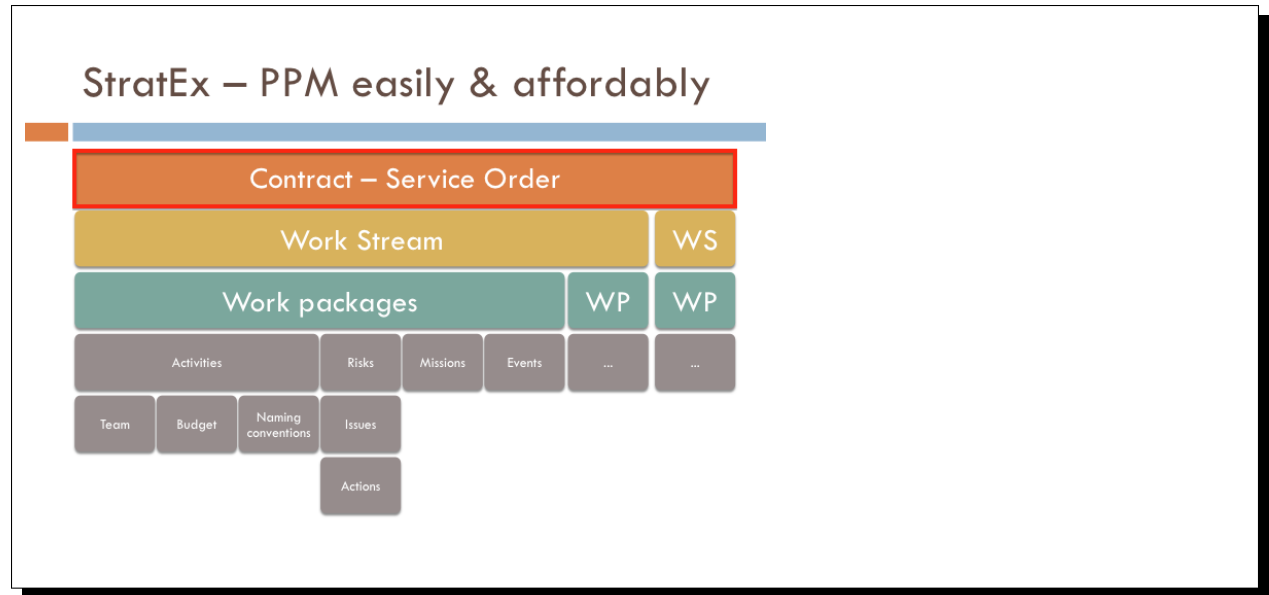
- **Create** an Action linked to a Work package: <https://www.stratexapp.com/Action/Create>
- **Manage** the Actions linked to the Work packages: <https://www.stratexapp.com/Action>

3.10.9 Contract menu

The *Contract* menu allows you to setup the contract from the *Proposal* to the effective agreement of your contract:

Contract menu bar

Manage a *Request for offer*, a *Proposal*, a *Contract* and a *Request for Action*



3.10.10 Contract > Request for Offer

The *Request for Offer* starts the *Proposal* cycle. It represents that request you have received from your client to prepare a proposal.

Hint: The data model of a Request for Offer is described here https://www.stratexapp.com/help/Request_For_Offer.htm

Manage a Request for offer

- **Create** a Request for offer: <https://www.stratexapp.com/RequestForOffer/Create>
- **Manage** the Requests for offers: <https://www.stratexapp.com/RequestForOffer>

3.10.11 Contract > Proposal

A *Proposal* is the first step before a *Contract*. It represents the description of the services you will offer under a contract. See <https://www.stratexapp.com/Proposal>

Hint: The data model of a Proposal is described here <https://www.stratexapp.com/help/Proposal.htm>

Manage a Proposal

- **Create** a Proposal: <https://www.stratexapp.com/Proposal/Create>
- **Manage** the Proposals: <https://www.stratexapp.com/Proposal>

3.10.12 Contract > Contract

A *Contract* represents an agreement between entities. In the case of *Framework contract*, it can include child contracts (Specific Contracts belonging to a Framework Contract).

A Contract can be a Framework Contract (e.g. a H2020 contract), a Call for Tender or a Regional request for subsidies ...

Hint: The data model of a Contract is described here <https://www.stratexapp.com/help/Contract.htm>

Manage a Contract

- **Create** a Contract: <https://www.stratexapp.com/Contract/Create>
- **Manage** the Contracts: <https://www.stratexapp.com/Contract>

3.10.13 Contract > Request for action

A *Request For Action* creates a request for something to stakeholder.

Hint: The data model of a Request for Action is described here https://www.stratexapp.com/help/Request_For_Action.htm

Manage a Request for Action

- **Create** a Request for Action: <https://www.stratexapp.com/RequestForAction/Create>
- **Manage** the Requests for Actions: <https://www.stratexapp.com/RequestForAction>

Create Requests for Action

Contract *

-- Select --

Title *

Description *

Due Date *

Status *

-- Select --

Requestor *

-- Select --

Assignee *

-- Select --

Save

Save and New

Cancel

▼ Need Help?

If you need to request something to stakeholder, it can be recorded via a Request For Action.

- Requestor: Organisation/Company/Institution requesting, e.g.: Your company, your client...
If the correct organisation does not appear in the list, it can be added to the Stakeholders (Master Data/Stakeholders).
- Assignee: Organisation/Company/Institution responsible of the action, e.g.: Your company, your client...
If the correct organisation does not appear in the list, it can be added to the Stakeholders (Master Data/Stakeholders).

For more information, click [here](#)

To watch the online tutorial, click [here](#)

3.10.14 View menu

The View menu allows you to manage the lowest level of information you may manage in a project.

View menu bar

Manage an *Activity*, an *Event* and a *Mission*

StratEx – PPM easily & affordably

Contract – Service Order

Work Stream

Work packages

Activities

Risks

Missions

Events

Team

Budget

Naming conventions

Issues

Actions

View ▼

Project ▼

Contract ▼

Reporting ▼

Master data ▼

Activity

Event

Mission

- An *Activity* is a process, function or task that occurs over time, has recognizable results and is managed. It is usually defined as part of a process or plan.. See [View > Activity](#)

- An *Event* represents the meetings, workshops or any other happenings you should attend or organize in the scope of the *Work package*. See *View > Event*
- A *Mission* is a detailed Work assignment which necessitates a travel. The mission information includes the destination, the other check-in and checkout. *Missions* are entered in a similar way as for *activities*. See *View > Mission*

3.10.15 View > Activity

An *Activity* is a process, function or task that occurs over time, has recognizable results and is managed. It is usually defined as part of a process or plan.

The activities are linked to a *Work package* they should result in specific outputs, which are the products, services or attributes resulting from those activities and linked to the objectives. e.g. Project management plan, state of the art study, test cases and dissemination artefacts

Hint: The data model of an Activity is described here <https://www.stratexapp.com/help/Activity.htm>

Manage an Activity

- **Create** an Activity: <https://www.stratexapp.com/Activity/Create>
- **Manage** the Activities: <https://www.stratexapp.com/Activity>

3.10.16 View > Event

An *event* represents the meetings, workshops or any other happenings you should attend or organize in the scope of the *Work package*

Note: you can assign participants to those events, invite them by email and send them an *iCalendar* or “iCal” invitation they could insert into their favourite calendar system

Hint: The data model of an Event is described here <https://www.stratexapp.com/help/Event.htm>

List the Events

Manage an Event

- **Create** an Event: <https://www.stratexapp.com/Event/Create>
- **Manage** the Events: <https://www.stratexapp.com/Event>

ITEA2 StratEx

View - Project - Contract - Reporting - Master data - Help - Abdelkrim BOUJRAF -

List of Events

Create New

Drag a column header here to group by that column

#	ID	Short Note	Event Identifier	Status	Start date/time	End date/time
		D0.0: Offer for H2020 Programme	EVT-0012	Open	01/Mar/2014 00:00	31/Mar/2014 00:00
		D5.2b, software: End-to-end privacy assurance software modules	EVT-0011	Open	01/Apr/2016 00:00	30/Jun/2016 00:00
		D0.0: Offer to Innoviris	EVT-0010	Closed	01/Nov/2013 09:00	02/Nov/2013 18:00

Page 1 of 1 (3 items)

Page size: 10

Export to: PDF Excel

Edit an event

Edit Events

Short Note *

D0.0: Offer for H2020 Programme

Description

Heading 3

Verdana

2 (10pt)

B I U S

Decide the organisation of the team, an offer needs to be written and a definition of the required artefacts is necessary to answer to the RDI issued by Innoviris.

Need Help?

An Event represents the meeting/workshops or any other events you should attend or organise in the scope of the WorkPackage.

- Short Note:** Title of the event.
- Description:** Full, textual description of the Activity that will support the participants to understand its scope.
- Event Identifier:** Prefix used for events is: [activity type]-[number]. The field is automatically filled in upon save. Use 'auto-filled' to regenerate the identifier.
- Organiser:** Organisation/Company/Institution responsible for the organisation of the event, e.g.: Your company, your client... If the correct organisation does not appear in the list, it can be added to the Stakeholders (MasterData/Stakeholders).
- Start date/time:** You may enter date and time here: dd/MM/yyyy hh:mm
- End date/time:** You may enter date and time here: dd/MM/yyyy hh:mm

For more information, click [here](#)
To watch the online tutorial, click [here](#)

Design Preview

Event Type *

ITEA3 StratEx

Event, Meeting, Kick-off

Event Identifier

EVT-0012

Status *

Open

Organiser *

StratEx

Start date/time

01/Mar/2014 00:00

3.10.17 View > Mission

A *Mission* is a detailed Work assignment which necessitates a travel. The mission information includes the destination, the other check-in and checkout. *Missions* are entered in a similar way as for *activities*.

Note: The missions linked to the Project are disclosed to the teams. Those data might be used for budget planning and help you monitor the Calendar

Hint: The data model of a Mission is described here <https://www.stratexapp.com/help/Mission.htm>

- **Create** a Mission: <https://www.stratexapp.com/Mission/Create>
- **Manage** the Missions: <https://www.stratexapp.com/Mission>

Edit a Mission

Edit Mission

Contract *

ITEA3 StratEx

IncSTI Inter-cloud identity governance

Title *

D0.O: Offer to Innoviris

Description *

- - - B I U S E ≡ ≡ ≡ / ~ -

-

A mission to ACME in Marseille (France) is necessary to prepare the list of artefacts to be produced for the offer

Design Preview

Need help?

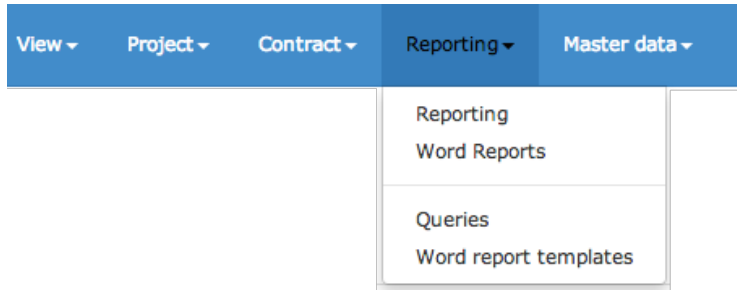
Records the missions planned and performed under a contract.

- Contract:** The contract under which the mission takes place
- Title:** The title of the mission.
- Description:** Full, textual description of the Mission.
Describe what will be the scope of the mission.
- Requested for:** Person that goes on mission
 - Destination:** Enter the destination (city, country) of the mission
- Travel budget/First day:** Travel budget in EURO of the mission, or the budget for the first day
- Subsistence budget/Subsequent days:** Subsistence budget in EURO of the mission, or the budget for the subsequent days
- Actual travel expenses/First day:** Actual travel expenses in EURO of the mission or for the first day
- Actual subsistence expenses/Subsequent days:** Actual subsistence expenses in EURO of the mission or for the subsequent days
- Approver:** Person who will approve the mission

For more information, click here
To watch the online tutorial, click here

3.10.18 Reporting menu

The Reporting menu allows you to manage and generate predefined reports that fit the team and the management needs.



- *Reporting > Reporting menu* generates reports to manage the day-to-day activities
- *Reporting > Word reports menu* generates Word and PDF reports ready to be shared with a predefined audience such as the executives, the team, the partners, the suppliers or the customers
- *Reporting > Queries menu* gives you the opportunity to define the reports
- *Reporting > Word report templates menu* gives you the opportunity to define the Word reports

Note: All reports may display information available inside the database such as *Contract*, *Work stream*, *Action*, etc.





3.10.19 Reporting > Reporting menu

The user generates reports to manage the day-to-day activities. The generated reports are predefined and can be defined using the *Create a query*. The queries can use any information available inside the database such as *Contract*, *Work stream*, *Action*, etc.

Those reports are visible online, can be exported in PDF or Excel formats.


List of Reports

Drag a column header here to group by that column

#		ID 	Short Name 
			
	Run	3	Outstanding activities (weekly view)
	Run	2	Outstanding events (weekly view)
	Run	1	Deliverables in Slippage (weekly view)

Page 1 of 1 (3 items)



Page size: 20 

Result of the reporting - online view

Run Deliverables in Slippage (weekly view)

Drag a column header here to group by that column

#	ID	Status	Week	ContractDescription	ActivityIdentifier	Version	Shortnote	Planned startdate	Planned enddate
Select	25	Not yet Started	2014-27	Contract between Innoviris and STi Consult	ITEA2_InCloudInG_13047-WP01-ACT-002	1.00	D1.1a: Half-yearly ITEA2 progress reports	01/07/2014	31/12/2014
Select	29	Not yet Started	2014-27	Contract between Innoviris and STi Consult	ITEA2_InCloudInG_13047-WP01-RPT-001	1.00	D1.3: Dissemination plan	01/07/2014	31/12/2014
Select	30	Not yet Started	2014-27	Contract between Innoviris and STi Consult	ITEA2_InCloudInG_13047-WP01-RPT-002	1.00	D1.4a: Market monitoring synthesis	01/07/2014	30/06/2015
Select	88	Unknown		Contract between Innoviris and STi Consult	InCloudInG-StiConsult-WP01-ACT-001	1.10	D1.1b: Half-yearly ITEA2 progress reports		
Select	1088	Not yet Started	2014-27	Contract between Innoviris and STi Consult	IncSTi-WP01-ACT-001	1.10	D1.1bb: Half-yearly ITEA2 progress reports	01/07/2014	25/07/2014

Page 1 of 1 (5 items)


Page size: 20

[Back to List](#)

Export to:

[PDF](#)[Excel](#)


Export of the report in Excel

Download the report in a Excel format : Deliverables in slippage (weekly_view) - Excel

Deliverables in Slippage (weekly view)

ID	Status	Week	ContractDescription	ActivityIdentifier	Version	Shortnote	Planned startdate	Planned enddate
25	Not yet Started	2014-27	Contract between Innoviris and STi Consult	ITEA2_InCloudInG_13047-WP01-ACT-002	1.00	D1.1a: Half-yearly ITEA2 progress reports	01/07/2014	31/12/2014
29	Not yet Started	2014-27	Contract between Innoviris and STi Consult	ITEA2_InCloudInG_13047-WP01-RPT-001	1.00	D1.3: Dissemination plan	01/07/2014	31/12/2014
30	Not yet Started	2014-27	Contract between Innoviris and STi Consult	ITEA2_InCloudInG_13047-WP01-RPT-002	1.00	D1.4a: Market monitoring synthesis	01/07/2014	30/06/2015
88	Unknown		Contract between Innoviris and STi Consult	InCloudInG-StiConsult-WP01-ACT-001	1.10	D1.1b: Half-yearly ITEA2 progress reports		
1088	Not yet Started	2014-27	Contract between Innoviris and STi Consult	IncSTi-WP01-ACT-001	1.10	D1.1bb: Half-yearly ITEA2 progress reports	01/07/2014	25/07/2014

Export of the report in PDF

Download the report in a PDF format : Deliverables in slippage (weekly_view) - PDF

Deliverables in Slippage (weekly view)

ID	Status	Week	ContractDescription
25	Not yet Started	2014-27	Contract between Innoviris and STi Consult
29	Not yet Started	2014-27	Contract between Innoviris and STi Consult
30	Not yet Started	2014-27	Contract between Innoviris and STi Consult
88	Unknown		Contract between Innoviris and STi Consult
1088	Not yet Started	2014-27	Contract between Innoviris and STi Consult

3.10.20 Reporting > Word reports menu

During a project you need to produce reports using different formats depending on your needs: Activity report or Monthly Progress Report, Acceptance Report or even a part of a Business plan. Those reports should fit the requirements of predefined audience such as the project' executives, your team, your partners, your suppliers or your customers.

The reports are exported in PDF or Word formats.

Note: You can customise the templates which are the basis of the current reports by using the [Reporting > Word report templates menu](#)

<CUSTOMER_NAME>
Framework Contract - AAA-AA-YYYY-MM
Project: <PROJECT_NAME> - <PROJECT_DESCRIPTION>

<PROJECT_NAME> Quarterly Activity Report N°XX
(StratEx-V-soXX-QAR-XXX)

Abstract
<ABSTRACT>

Document information

AUTHOR	<AUTHOR>
OWNER	<CUSTOMER_NAME>
ISSUE DATE	DD MMMM YYYY
VERSION	X.XX
APPROVAL STATUS	Submitted

Document History

VER	DATE	AUTHOR	DESCRIPTION	ACTION*	PG

Action: I = Insert, R = Replace

<PROJECT_NAME> Quarterly Activity Report N°XX

Contents

- 1 DESCRIPTION OF SERVICE**
 - 1.1 WP-R-<CUSTOMER_NAME>-XXX:
 - 1.1.1 Scope
 - 1.1.2 Activities
 - 1.1.3 Deliverables
- 2 ACTIVITIES OVERVIEW**
 - 2.1 <JOB_DESCRIPTION> - TASKS
 - 2.2 <JOB_DESCRIPTION> - VERSIONS OF THE SOURCE CODE
 - 2.3 <JOB_DESCRIPTION_2> - VERSIONS OF THE SOURCE CODE
- 3 PAYMENT**
 - 3.1 PAYMENT REQUESTED
- 4 APPLICABLE DOCUMENTS AND TERMINOLOGY**
 - 4.1 APPLICABLE DOCUMENTS
 - 4.2 ACRONYMS & ABBREVIATIONS

Export of the report in Word

Download a sample report in a Word format  : Activity report - Word

Export of the report in PDF

Download a sample report in a Word format  : Activity report - PDF

3.10.21 Reporting > Queries menu

The reports you can generate to manage the day-to-day activities (see [Reporting > Reporting menu](#)). The reports are based on queries that can use any information available inside the database such as *Contract*, *Work stream*, *Action*, etc.

List of queries generating reports

Manage a Query

- **Create** a Query: <https://www.stratexapp.com/Query/Create>
- **Manage** the queries: <https://www.stratexapp.com/Query>

List of Queries

Create New

Drag a column header here to group by that column

#		ID	Short Name
	Details Delete	3	Outstanding activities (weekly view)
	Details Delete	2	Outstanding events (weekly view)
	Details Delete	1	Deliverables in Slippage (weekly view)

Page 1 of 1 (3 items) Page size: 10

Export to: PDF Excel

Create a query

Description of the fields defining a report:

- **Short Name:** Descriptive name of the query i.e. “Outstanding activities (weekly view)”
- **Query Definition:** SQL statement for the query
- **Target Page:** The page that will pop up if a line in the query result is selected. i.e. Activity

Create Queries

Short Name *

Outstanding activities (weekly view)

Query Definition *

```
SELECT Activity.ID, CAST(DATEPART(yyyy,
Activity.PlannedStartdate) AS char(4)) + '-' +
CAST(DATEPART(wk, Activity.PlannedStartdate) AS char(2))
AS Week, Contract.Description AS Contract,
Activity.ActivityIdentifier,
Activity.Version, Activity.Shortnote,
CONVERT(char(10), Activity.PlannedStartdate, 103) AS
'Planned startdate', CONVERT(char(10),
Activity.PlannedEnddate, 103) AS 'Planned enddate',
Person.Name,
```

Target Page *

Activity

Save

Save and New

Cancel

Need Help?

Queries form the basis of list-based reports that you can use to draw customised reports from StratEx.

- **Short Name:** Descriptive name of the query
- **Query Definition:** SQL statement for the query
- **Target Page:** The page that will pop up if a line in the query result is selected. Ensure that the query result contains an ID field the relates to the page

For more information, click [here](#)
To watch the online tutorial, click [here](#)

3.10.22 Reporting > Word report templates menu

The word reports you can generate and share with your project' executives, teams, partners, customers or suppliers (see *Reporting > Word reports menu*) are customisable. The word reports are based on queries that can use any information available inside the database such as *Contract*, *Work stream*, *Action*, etc.

Word templates list

Manage a Word template

- **Manage the Word reports:** <https://www.stratexapp.com/MaintainReport>

Maintain Word reports

Drag a column header here to group by that column

#	Name	Description	Master template
› Edit New Delete	Monthly Progress Report	Monthly Progress Report	DEMO_MPR_Cover.doc
› Edit New Delete	Activity Report	Activity Report	DEMO_so_generic_cover.doc

Page 1 of 1 (2 items)

Page size: 5

Available Word Report Templates:

- DEMO_MPR_Cover.doc Remove
- DEMO_MPR_PM_Tasks.doc Remove
- DEMO_MPR_SO.doc Remove
- DEMO_so_generic_content.doc Remove
- DEMO_so_generic_cover.doc Remove

Choose File No file chosen

Upload

Create a word template

Description of the fields defining a Word report:

- **Short Name:** Descriptive name of the query i.e. “Outstanding activities (weekly view)”
- **Query Definition:** SQL statement for the query
- **Target Page:** The page that will pop up if a line in the query result is selected. i.e. Activity

Upload a new template

Maintain Word reports

Drag a column header here to group by that column

#	Name	Description	Master template
▼ Edit New Delete	Monthly Progress Report	Monthly Progress Report	DEMO_MPR_Cover.doc
	#	Template order	Template name
▶ Edit New Delete		1	DEMO_MPR_PM_Tasks.doc
▶ Edit New Delete		2	DEMO_MPR_SO.doc
▶ Edit New Delete	Activity Report	Activity Report	DEMO_so_generic_cover.doc

Page 1 of 1 (2 items)

◀◀

◀

1

▶

▶▶

Page size: 5

Available Word Report Templates:

- [DEMO_MPR_Cover.doc](#) [Remove](#)
- [DEMO_MPR_PM_Tasks.doc](#) [Remove](#)
- [DEMO_MPR_SO.doc](#) [Remove](#)
- [DEMO_so_generic_content.doc](#) [Remove](#)
- [DEMO_so_generic_cover.doc](#) [Remove](#)

No file chosen










Upload new templates



Set the cover page of the report

The report is made of one cover page. Set the cover page you would like to be present at the beginning of the report.

Maintain Word reports

Drag a column header here to group by that column

#	Name	Description	Master template									
												
 Edit New Delete	Monthly Progress Report	Monthly Progress Report	DEMO_MPR_Cover.doc Cover of the report									
<table border="1"> <thead> <tr> <th>#</th> <th>Template order</th> <th>Template name</th> </tr> </thead> <tbody> <tr> <td> Edit New Delete</td> <td>1</td> <td>DEMO_MPR_PM_Tasks.doc</td> </tr> <tr> <td> Edit New Delete</td> <td>2</td> <td>DEMO_MPR_SO.doc</td> </tr> </tbody> </table>				#	Template order	Template name	 Edit New Delete	1	DEMO_MPR_PM_Tasks.doc	 Edit New Delete	2	DEMO_MPR_SO.doc
#	Template order	Template name										
 Edit New Delete	1	DEMO_MPR_PM_Tasks.doc										
 Edit New Delete	2	DEMO_MPR_SO.doc										
 Edit New Delete	Activity Report	Activity Report	DEMO_so_generic_cover.doc									

Page 1 of 1 (2 items)  Page size: 5 

Available Word Report Templates:

- DEMO_MPR_Cover.doc Remove
- DEMO_MPR_PM_Tasks.doc Remove
- DEMO_MPR_SO.doc Remove
- DEMO_so_generic_content.doc Remove
- DEMO_so_generic_cover.doc Remove

Choose File No file chosen

Upload

Set the sub reports composing the report

The report is made of sub reports. Those sub reports display certain items stored in the project. Those items can be the information related to a *Work Stream*, a *Work package*, a *Contract* etc.

Note: The sub reports can be used in many different reports. You may use a report displaying the list of actions in a Meeting *minutes* or an *Activity report*

Maintain Word reports

Drag a column header here to group by that column

#	Name	Description	Master template
Edit New Delete	Monthly Progress Report	Monthly Progress Report	DEMO_MPR_Cover.doc

#	Template order	Template name
Edit New Delete	1	sub report listing the management tasks DEMO_MPR_PM_Tasks.doc
Edit New Delete	2	sub report listing the activities planned DEMO_MPR_SO.doc

Edit New Delete	Activity Report	Activity Report	DEMO_so_generic_cover.doc
-----------------	-----------------	-----------------	---------------------------

Page 1 of 1 (2 items) Page size: 5

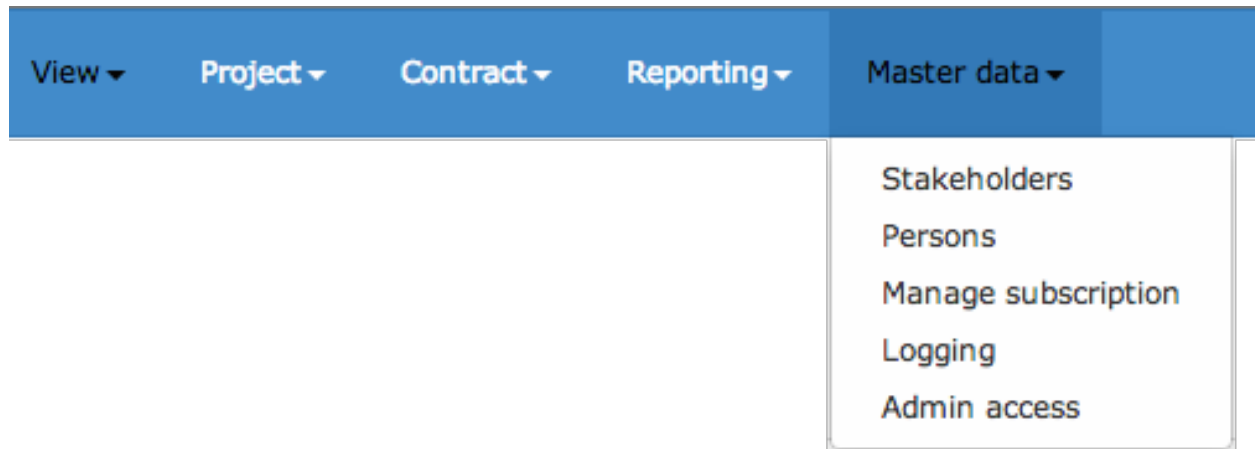
Available Word Report Templates:

- DEMO_MPR_Cover.doc [Remove](#)
- DEMO_MPR_PM_Tasks.doc [Remove](#)
- DEMO_MPR_SO.doc [Remove](#)
- DEMO_so_generic_content.doc [Remove](#)
- DEMO_so_generic_cover.doc [Remove](#)

No file chosen

3.10.23 Master data menu

The *Master data* menu allows you to manage the *Stakeholders* or *Persons* involved in the projects you are working for; manage your *Subscriptions*,



- *Master data > Stakeholders* enables the user to manage the representatives of the organisations involved in the projects
- *Master data Persons* enables the user to manage the members of a project
- *Master data Subscriptions* enables the user to upgrade or downgrade the type of *Subscription* required to manage the size of their project

3.10.24 Master data > Stakeholders

List of *stakeholders* participating to a Project. A Stakeholder represents an organization involved in the Project. It can be your organization, a partner, a supplier or your client.

List of Stakeholders

Hint: The data model of a Stakeholder is described here <https://www.stratexapp.com/help/Stakeholder.htm>

Manage Stakeholders

- **Create** a Stakeholder: <https://www.stratexapp.com/Stakeholder/Create>
- **Manage** the Stakeholders: <https://www.stratexapp.com/Stakeholder>

List of Stakeholders

Create New

Drag a column header here to group by that column

#		ID	Name
	Details Delete	3073	ALT-F1
	Details Delete	3072	StratEx
	Details Delete	2072	H2020 StratEx Consortium

Page 1 of 1 (3 items) Page size: 10

Export to: PDF Excel

Details of a Stakeholder

Stakeholders Details

Stakeholders Details

Edit

Delete

Back to List

ID	3072
Name	StratEx
Email	support@stratexapp.com

3.10.25 Master data Persons

List of *Persons* participating to a Project. A Person is an individual working on the Project. It can be a member of your team or a representative from your client.

List of Persons

Hint: The data model of a Person is described here <https://www.stratexapp.com/help/Person.htm>

Manage a Person

- **Create** a Person: <https://www.stratexapp.com/Person/Create>
- **Manage** the Persons: <https://www.stratexapp.com/Person>

List of Persons

[Create New](#)

Drag a column header here to group by that column

#		ID	Name (Last, First)	Initials	Email
	Details Delete	4036	Yasmina B.	YBO	yasmina@stratexapp.com
	Details Delete	3030	Sven VD	SVD	svd+inclouding@stratexapp.com
	Details Delete	3029	Rudolf DS	RDS	rds+inclouding@stratexapp.com
	Details Delete	3028	Marc V.	MVR	abo+marc.v@stratexapp.com
	Details Delete	2029	Mathieu D.	mdu	mdu+stratex@stratexapp.com
	Details Delete	2028	Abdelkrim BOUJRAF	ABO	abo+inclouding@stratexapp.com

Page 1 of 1 (6 items)

Page size: 10 Export to: [PDF](#) [Excel](#)

Details of a Person

Persons Details

[Persons Details](#)[Assigned Projects](#)[Edit](#)[Delete](#)[Activate User](#)[Reset password](#)[De-Activate User](#)[Back to List](#)

ID	2028
Name (Last, First)	Abdelkrim BOUJRAF
Initials	ABO
Works for	H2020 StratEx Consortium
Username	ABO
Email	abo+inclouding@stratexapp.com
Account Owner	<input checked="" type="checkbox"/>

Assign a project to a person

Persons Details

Persons Details		
Assigned Projects		
Drag a column header here to group by that column		
#	Project	Role
Edit New Delete	ITEA3 StratEx	Project Owner
Edit New Delete	StratEx Demo for Bank	Project Owner
Edit New Delete	StratEx Demo	Project Owner
Page 1 of 1 (3 items) ⏪ ⏩ 1 ⏪ ⏩ Page size: 10 ▼		

3.10.26 Master data Subscriptions

StratEx comes with several business models depending on the customer needs; the user pays periodically (monthly or yearly) the use or access of StratEx.

A free version of StratEx is available on top of the “Standard”, “Professional” or “Enterprise” versions.

Note: The detailed description of the subscriptions is described here <https://www.stratexapp.com/index.html#pricing-page>

3.10.27 Help menu

The help lists all pages for which documentation exists: <https://www.stratexapp.com/Help/Topics>

ew ▼	Project ▼	Contract ▼	Reporting ▼	Master data ▼	Help ▼
					Help About

4.1 StratEx en bref

StratEx qui signifie **Exécution Stratégie** (en français), est une application Web qui permet aux gestionnaires de projets et managers de *contrôler* la livraison de projets en utilisant les *processus* mis en place par les clients tout en imposant des *conventions partagées* par tous les membres de l'équipe.

StratEx adresse, à minima, les besoins suivants:

- **Gestion de contrat:**
 - Comment prouver que la demande de paiement d'un service est légitime?
 - Détient-on les rapports d'acceptance et d'activité pour supporter les demandes de nos sous-contractants?
- **Gestion documentaire:**
 - Les PMO connaissent-ils le statut des *livrables*?
 - Où donc les collaborateurs et sous-contractants ont-ils.elles stocké les documents du projet?
- **Gestion de projet:**
 - Est-ce que les équipes sont au courant des dates de livraison?
 - Vos collaborateurs.trices respectent-ils.elles les méthodes et standards définis par votre client?

4.1.1 Customer Problem

In 2006, a huge Project for the European Commission starts. It implies 30 Countries willing to exchange sensitive data to protect the citizens; 10 consulting firms have to deliver: business & technical requirements, the software, the support, the quality assurance.

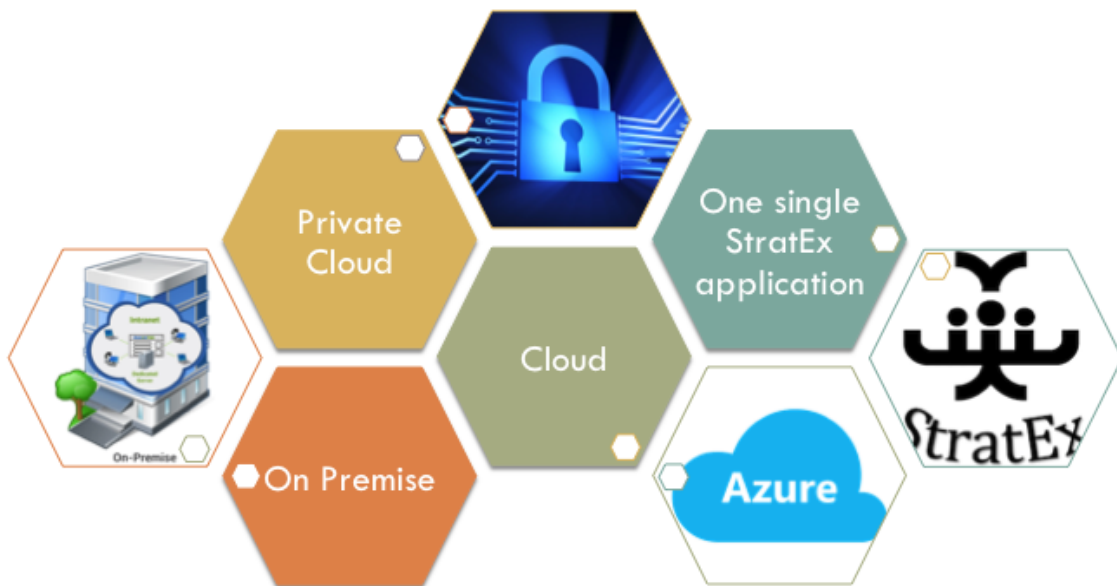
Our job: ensure a smooth quality assurance but none solutions did fit our needs: assure the quality of 9.000 deliverables over 7 years.

We decided to develop our solution: StratEx

4.1.2 Products & Services

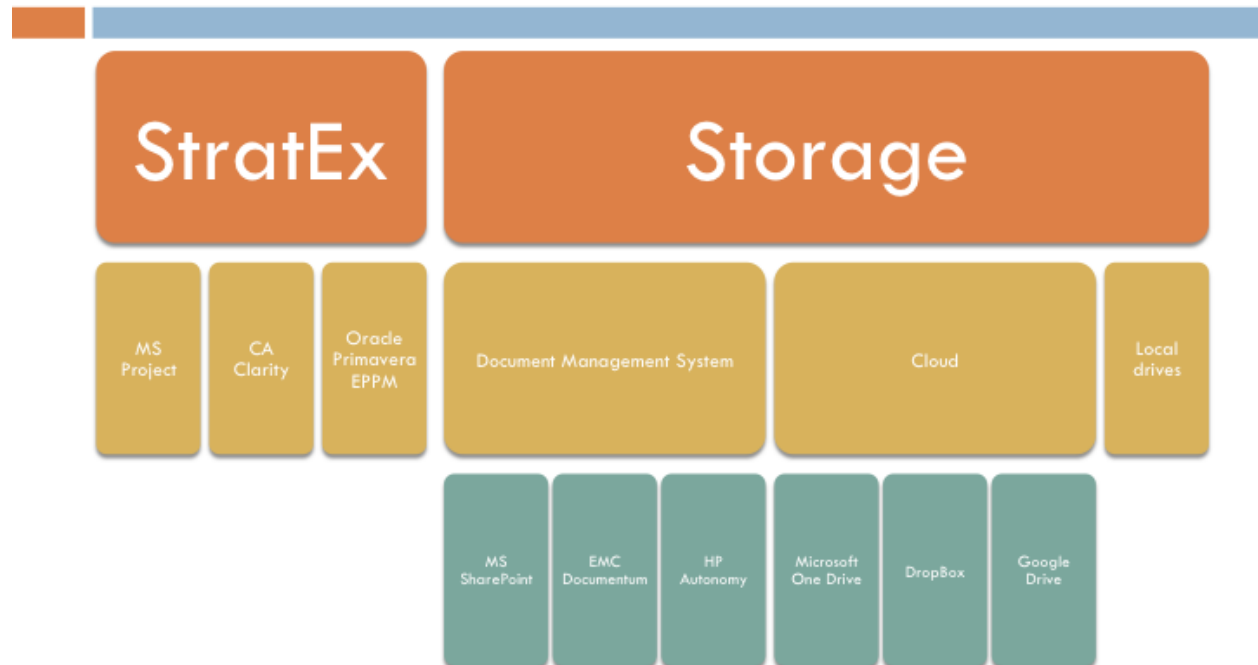
- StratEx is proposed as a *Public Cloud*, *Private Cloud* or an *On Premise* Web application.

Public-Private Cloud & On-Premise solutions



- StratEx is a perfect fit with its co-opetitors Microsoft Project, CA Clarity, Oracle Primavera EPPM and Microsoft SharePoint.
- StratEx integrate seamlessly with Document management systems like MS SharePoint, EMC Documentum, HP Autonomy
- Our users can store their data on our servers or keep their files on Microsoft One Drive, DropBox, Google Drive their NAS

A smooth integration with IT vendors



4.1.3 Public SaaS, Private SaaS and On-Premise application

Due to the aspect of our SaaS solution, customers can be located anywhere in the world.

We are focusing primarily on European based self-employed up to large firms whatever their size. That's a B2B business even if Citizens may use StratEx.

We target (A) Firms requesting grants and subsidies, (B) Firms who need to control their deliveries for legal, contractual reasons and (C) Firms delegating their PM.

4.1.4 Business model

- *Public Cloud* solution (also named *SaaS*) is based on subscription from 20 to 40 EUR per month per user
- *Private Cloud* solution is based on setup cost + subscription from 20 to 40 EUR per month per user
- *On Premise* solution is priced based on licensing fees, consulting services and three-year maintenance contracts

4.1.5 Avantage compétitif de StratEx

- Focalisation sur le contrat
- Propose des conventions de nommage pour assurer une gestion documentaire fluide et cohérente

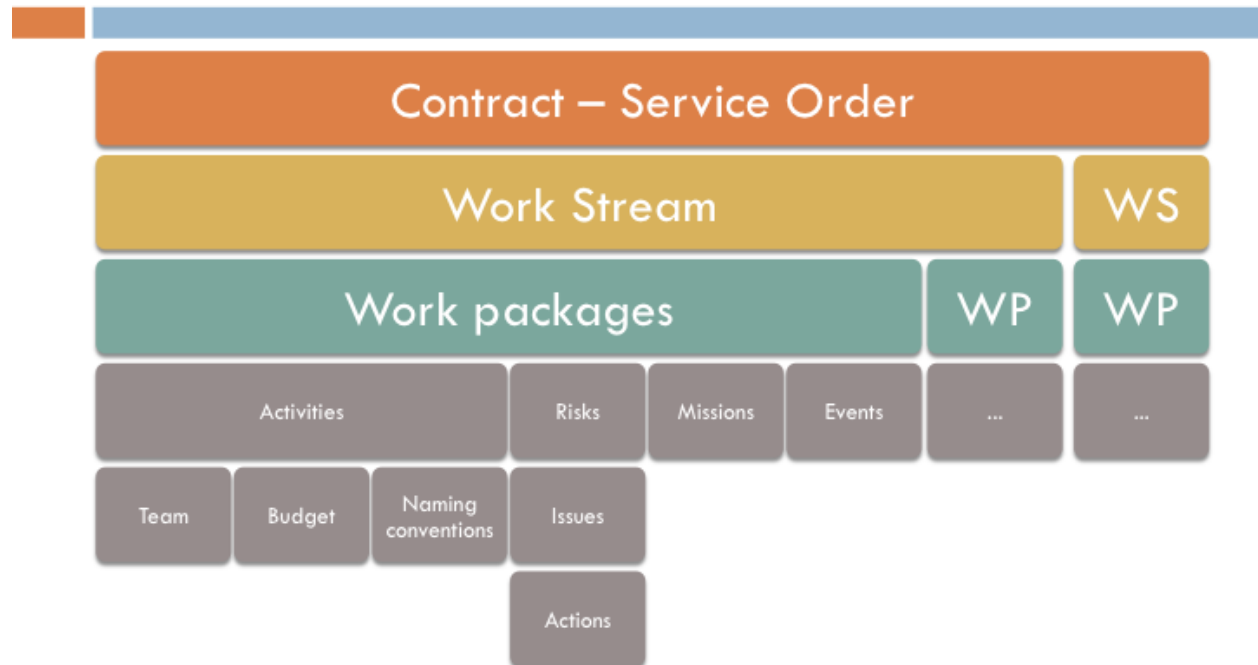
- Propose une structure de répertoire pour le stockage de fichiers qui n'implique pas de coûts élevés de personnalisation auprès du client
- Propose des centaines de modèles de documents utilisables tels quels lors des projets
- Fournir une gestion de projet et de programme en temps réel
- Génère les rapports, le principal défi d'un gestionnaire de projet, d'un membre d'équipe et du conseil de direction

4.1.6 Modèle de données

Voici la vue hiérarchique du modèle de données de StratEx, le modèle décrit les liens entre les ressources produites pendant la vie d'un projet tels que:

- Un *Flux de travail* ou *Work streams*
- *Lot de travail* ou *Work packages*
- Activités ou *Activities*
- Équipe ou Team
- Budget
- *Convention de nommage* ou *Naming conventions*
- *Risques* ou *Risks*
- *Problème majeur* ou *Issues*
- *Actions*
- *Missions*
- *Événements* ou *Events*

StratEx – PPM easily & affordably



4.1.7 L'équipe du projet

Abdelkrim Boujraf (Sales & Marketing at ALT F1), Rudolf de Schipper (Delivery Lead Belgium and International Institutions at Unisys), Sven Vandormael (Project Manager at Unisys)

4.2 Gestion de la livraison

4.2.1 “Home” your personal to-do-list

When you select the StratEx home page you will see, a central screen with “your” personal planned tasks; which might be: *deliverables* to produce, meetings to attend (called “*events*”) or *missions*, business trips you might need to organise – basically, the StratEx home page is your personal dashboard on a specific Project; your to-do-list.

My Things To Do

All My Activities

Drag a column header here to group by that column

#	New Activity Event Mission	Type	ID	Identifier	Short Note	Description	Start	End
	Details Delete	Mission	15		D0.0: Offer to Innoviris	A mission to ACME in Marseille (France) is necessary to prepare the list of artefacts to be produced for the offer	27/Feb/2014	28/Feb/2014
	Details Delete	Event	18	EVT-0012	D0.0: Offer for H2020 Programme	Decide the organisation of the team, an offer needs to be written and a definition of the required artefacts is necessary to answer to the RDI issued by Innoviris.	01/Mar/2014	31/Mar/2014
	Details Delete	Risk	22	Risk/Issue/Action	Quality of results or work of partners is not sufficient to be of use	Assist to keep strict quality control and management in the project	14/May/2014	14/May/2014
	Details Delete	Activity	1088	IncSTI-WP01-ACT-001	D1.1bb: Half-yearly ITEA2 progress reports	D1.1bb: Half-yearly ITEA2 progress reports	01/Jul/2014	25/Jul/2014
	Details Delete	Issue	1	Risk/Issue/Action	a title	a description	13/Jul/2014	13/Jul/2014
	Details Delete	Action	28	Risk/Issue/Action	Collect the balance sheet of StratEx	We need the balance sheet figures of StratEx to request H2020 funding	19/Aug/2014	19/Aug/2014

StratEx promotes efficiency as well as teamwork. Indeed in order to keep things in proper order, to compile reliable information it must be processed at the source. Each operator enters and reviews his/her own activities in the database.

Project management Office or PMO and consultants all work with and around StratEx. Once a consultant gets his/her access rights set up, he/she may access the tool directly via an Internet or Intranet hyperlink.

Important: At any time StratEx provides an accurate picture of all activities on the Project.

As much as the personal dashboard might be useful, it is however still necessary to be able to get a global view on the Project and to seek information from a broader source. For delivery management this may be done through the [View > Activity](#) or [View > Event](#) or [View > Mission](#) screens.

4.2.2 Activity – Deliverables Management

When you select the “Activity” tab, a list is populated with all the activities recorded on your Project.

List of Activities

[Create New](#)

Drag a column header here to group by that column

#		ID	Short Note	Contractual	Activity Identifier	Version	Status	Planned Start date	Planned End date	Actual End date
Clear			d1.1							
	Details Delete	1088	D1.1bb: Half-yearly ITEA2 progress reports	<input checked="" type="checkbox"/>	IncSTI-WP01-ACT-001	1.10	Open	01/Jul/2014	25/Jul/2014	
	Details Delete	88	D1.1b: Half-yearly ITEA2 progress reports	<input type="checkbox"/>	InCloudInG-StiConsult-WP01-ACT-001	1.10	Deprecated			
	Details Delete	28	D1.1d : Half-yearly ITEA2 progress reports	<input type="checkbox"/>	ITEA2_InCloudInG_13047-WP01-ACT-005	1.00	Open	01/Jan/2016	30/Jun/2016	
	Details Delete	27	D1.1c : Half-yearly ITEA2 progress reports	<input type="checkbox"/>	ITEA2_InCloudInG_13047-WP01-ACT-004	1.00	Open	01/Jul/2015	31/Dec/2015	
	Details Delete	26	D1.1b: Half-yearly ITEA2 progress reports	<input type="checkbox"/>	InCloudInG-StiConsult-WP01-ACT-001	1.00	Open	01/Jan/2015	30/Jun/2015	
	Details Delete	25	D1.1a: Half-yearly ITEA2 progress reports	<input type="checkbox"/>	ITEA2_InCloudInG_13047-WP01-ACT-002	1.00	Open	01/Jul/2014	31/Dec/2014	

Page 1 of 1 (6 items)



Page size: 10

Export to: [PDF](#) [Excel](#)

When you select the “details” option, a new screen shows up where you can edit your item. If you prefer to create a complete new item from scratch you should select the command “create new” from the main “Activity” window.

Edit Activities

Workpackage *

ITEA3 StratEx

IncSTI Inter-cloud identity governance

WS01-InCloudInG

WP01-Project guidance and dissemination

Short Note *

D1.1bb: Half-yearly ITEA2 progress reports

Description



B I U S [font size] [color] [background color] [text color] [link] [unlink] [image] [table] [indent] [outdent] [undo] [redo] [find] [replace] [print] [help]

A [font color]

D1.1bb: Half-yearly ITEA2 progress reports

Design

Preview

Need Help?

An activity results in specific outputs, which are the products, services, activities, or attributes resulting from the activities and linked to the objectives (e.g. project management plan, state of the art study, test cases, dissemination artefacts).

- **Workpackage:** The Workpackage this activity belongs to.
- **Short Note:** A short description of the activity such as the Title of a document to be produced.
- **Description:** Full, textual description of the Activity that will support the participants to understand its scope.
- **Contractual:** Check if this is a contractual deliverable.
NOTE: First save the Activity before selecting a payment
- **Activity Identifier:** Prefix used for activities is: [contract code]-[WP act id][activity type]-[number]. The field is automatically filled in upon save of the Activity. Use 'auto-filled' to regenerate the Identifier
- **Version for review:** The version of the item that is to be reviewed.
- **Owner:** Organisation/Company/Institution responsible for the follow-up of the Activity, e.g.: Your company, your client...
If the correct organisation does not appear in the list, it can be added to the Stakeholders (MasterData/Stakeholders).

For more information, click [here](#)

To watch the online tutorial, click [here](#)

4.2.3 Convention de nommage

Les *activités* qui sont à délivrer pendant le projet sont introduites dans StratEx en utilisant une **convention de nommage**. La convention facilite l'identification des actions exécutées pendant un contrat ou un service.

La convention est nécessaire pour les *activités* mais aussi les *événements* ou tout autre ressource enregistrée dans StratEx qui est liée au contrat. Grâce à l'utilisation d'un ID UNIQUE (identifiant unique), il est possible d'identifier clairement toute tâche exécutée lors du projet.

La convention est un principe basic qui concerne tout le système de rapports générés par StratEx.

Cette convention aide les consultants à nommer correctement les *livrables* et documents et harmonise la communication entre les consultants travaillant sur un même projet.

Chaque document ou fichier est suivi grâce à un ID UNIQUE. StratEx supporte et génère les identifiant.

Note: Exemple de convention de nommage: *PROJ-C-SC01-REP-001-1.00_Report_April_2014.doc*

Table 1: Description de la convention de nommage

Code	Meaning
PROJ	Project Framework contract
C	Common (the middle letter allows sub-grouping within a framework contract)
SC01	Specific Contract 01
REP	Document type (here a Report)
001	Sequence (first report of a series)
1.00	Version

Note: Les écrans décrivant les activités et les événements sont construits suivant une structure similaire;

- Cependant, un événement peut être relevant pour plusieurs participants travaillant sur plusieurs *commandes de services* ou *service order*.
- Les activités ne peuvent être liées qu'à des *commandes de services* ou *service order*.

C'est la raison principale de la différence entre les deux et la raison pour laquelle StratEx utilise une convention de nommage pour les événements

Important: Pour assurer un suivi et une vérification croisée entre les livraisons et le contrat, un livrable peut être marqué comme "*contractuel*" lorsqu'il est lié à un paiement. Le gestionnaire de projet saura s'il.elle a rempli son obligation contractuelle.

Tip: Voici une proposition de convention de nommage sur vos projets

StratEx - Document Naming Conventions

StratEx-soXX-001-I-RPT-1.00- Doc explicit short Description

ID: StratEx-soXX-001-I-COD

File: StratEx-soXX-002-I-RPT-1.00-UC_Manage Application Mapping Diagram.doc

File: StratEx-soXX-003-I-MTG-2011-10-31-14h30-15h00-status meeting.doc

StratEx-so00-XXX-X-NNN-V.VV_Free description.filext

Contract	
StratEx	PPM Easily & Affordably
soXX	Service order N°
001	Sequence N°
File type	
C	Common
I	Internal
A	Action
T	Template

DOC Type	
AR	Acceptance Report
MTG	Meeting Minutes
MSC	Miscellaneous
RPT	Report, Deliverable
COD	Source code
LNK	Link, URL
PRC	Procedure
SAL	Sales
File version	
1.00	By ID
2011-10-31	By date YYYY-MM-DD

Legend

C-Common: General documents (e.g. organization chart, acronyms...)

I-Internal: Document **NOT** to deliver to external actors

A-Action: List of actions

T-Template: template of a document to use independently of the project

Note: StratEx est construit pour faciliter son usage par les collaborateurs sur le projet, nous espérons que l'outil est intuitif et qu'il se passe d'explications; Veuillez [partager vos réactions](#) à tout moment!

4.3 Citation and Glossary

4.3.1 Citations

4.3.2 Glossary

Acceptance The formal act of acknowledging that the Project has met agreed acceptance criteria and thereby met the requirements of its stakeholders. [Prince2Glossary2009]

Action Actions are acts that people or stakeholders need to do to make the Project reach its objectives. Actions are not deliverables and are not meant to produce value for your Project (such as activities).

See <https://www.stratexapp.com/help/Action.htm>

Action (fr) Les actions sont des actes que les parties prenantes du projet doivent exécuter pour que le projet atteigne ses objectifs. Les actions ne sont pas des *livrables* et ne sont pas censées générer de la valeur pour votre projet (telles que des *activités*).

See <https://www.stratexapp.com/help/Action.htm>

Actions See *action*

Activités Un processus, une fonction ou une tâche qui se produit au fil du temps, a des résultats reconnaissables et est géré. Il est généralement défini comme faisant partie d'un processus ou d'un plan. [Prince2Glossary2009] Une activité produit des résultats spécifiques, qui sont: des produits, des services ou attributs résultant des activités et liés aux objectifs. Par exemple: un plan de gestion de projet, une étude de l'état de l'art, des cas de test, des ressources à disséminer. See <https://www.stratexapp.com/help/Activity.htm>

Activities See *Activity*

Activity A process, function or task that occurs over time, has recognizable results and is managed. It is usually defined as part of a process or plan. [Prince2Glossary2009]

An activity results in specific outputs, which are the products, services or attributes resulting from the activities and linked to the objectives (e.g. Project management plan, state of the art study, test cases, dissemination artefacts).

See <https://www.stratexapp.com/help/Activity.htm>

Activity report Protocols, which are *Minutes*, describe the activities that have been performed during a specified period.

Activity type Possible type of an *activity*: Progress report, Meeting minutes, Report, Acceptance report, Event, Meeting, Kick-off

Appel d'offre L'appel d'offre démarre par un cycle de proposition. L'appel représente la requête que vous avez reçue de la part de votre client pour préparer une proposition d'affaires.

Assurance All the systematic *actions* necessary to provide confidence that the target (system, process, organization, programme, *Project*, outcome, benefit, capability, product output, *deliverable*) is appropriate. Appropriateness might be defined subjectively or objectively in different circumstances. The implication is that assurance will have a level of independence from that which is being assured.

See also '*Project Assurance*' and '*Quality assurance*'. [Prince2Glossary2009]

Commandes de services Une **Commande de services** est signifiée par le CLIENT au CONTRACTANT conformément à la procédure de commande au format convenu, qui comprend le mandat et les conditions particulières de la collaboration.

Concession An *off-specification* that is accepted by the Project Board without corrective action.

Contract A contract represents an agreement between entities. In the case of Framework contract, it can include child contracts (Specific Contracts belonging to a Framework Contract).

See <https://www.stratexapp.com/help/Contract.htm>

Contracts See *Contract*

Control The managers can **control** and support the teams whether they are interns, consultants or offshore participants to the Project

Contrôler Le gestionnaire peut **contrôler** et supporter les équipes qu'elles soient internes, externes, consultants ou basées dans un pays étranger (offshore)

Convention de nommage StratEx propose des conventions de nommage pour faciliter la gestion documentaire pendant la durée du projet

Corrective action A set of actions to resolve a threat to a plan's tolerances or a defect in a product.

Deliverables

Deliverable Product, Deliverable or Outcome is used to describe everything that the Project has to create or change, however physical or otherwise these may be. Results of Projects can vary enormously from physical items, such as buildings and machinery, to intangible things like culture change and public perception. [CCTA1998]

Demande de changement C'est un type de *risque*: La demande de changement est une “*requête qu'il faut considéré liée à un changement dans la feuille de route de référence*” [PRINCE2Revealed]

Events

Event An Event represents the meetings, workshops or any other happenings you should attend or organize in the scope of the *Work package*.

See <https://www.stratexapp.com/help/Event.htm>

Événements

Événement Un événement représente les réunions, les ateliers ou tout autre actualité un participant au projet doit participer ou organiser dans le périmètre d'un you should attend or organize in the scope of the *Work package*.

See <https://www.stratexapp.com/help/Event.htm>

Flux de travail Un flux de travail ou *Work stream* définit les étapes d'un projet à un très haut niveau. Un flux de travail fait partie d'un contrat.

See <https://www.stratexapp.com/help/Workstream.htm>

Follow-on action recommendations Recommended actions related to unfinished work, on-going issues and risks, and any other activities needed to take a product to the next phase of its life. These are summarized and included in the End Stage Report (for phased handover) and End Project Report. [Prince2Glossary2009]

Framework contract The concept of a framework agreement is that it is, essentially, an arrangement, which establishes the contractual terms which, will apply to subsequent orders made for the goods, services or works covered by the framework over the period of time during which, it is in force. [ProcurementLawyerOrganization]

Hors norme il s'agit d'un type de *risque* qui est **hors norme** et indique qu'une information doit être fournie lors du projet mais qui n'est pas disponible à ce jour (ou qui n'est pas prévue dans le futur). Cela peut-être un produit ou service qui ne répond pas ou plus aux spécifications nécessaires à la bonne exécution du projet. [PRINCE2Revealed]

iCal See *iCalendar*

iCalendar iCalendar is a computer file format which allows Internet users to send meeting requests and tasks to other Internet users, via email, or sharing files with an extension of “.ics”.

See <http://en.wikipedia.org/wiki/ICalendar>

Issues

Issue A term used to cover any *problem/concern*, query or *Request for Change*, a suggestion or *Off-Specification* raised during the Project. They can refer to anything related to the Project.

See <https://www.stratexapp.com/help/Issue.htm>

Job scheduler Graphical user interface for definition and monitoring of background executions such as the generation of a report

Livrables

Livrable Un livrable est un produit, un document ou tout résultat qui sert à décrire tout ce qu'un projet doit changer ou créer, cela peut être un élément physique.

Les résultats des projets varient énormément, ils peuvent être des objets physiques comme des bâtiments ou des machines, des choses intangibles comme un changement de culture ou la perception du public. [CCTA1998]

Logging Logging menu enables the user to check the technical activities performed by StratEx to support their project i.e. send email, perform a backup

Lot de travail Un lot de travail ou *Work package* est un élément constitutif de la *structure de répartition du travail* ou *Work breakdown structure* qui permet au gestionnaire de projet de définir les étapes nécessaires à l'achèvement des travaux.

par exemple: Gestion de programme, Logiciel de contrôle de production, Test, Déploiement, Marketer un projet.

Un lot de travail dépend d'un *flux de travail* ou term: *Work stream*.

Master data Master data menu contains StratEx administrative data; people access rights, stakeholders, persons, *subscription* management, *logging* and administrative access to the data

Meetings

Meeting In a meeting, two or more people come together to discuss one or more topics, often in a formal setting.

Minutes Protocols, which are minutes or, informally, notes, are the instant written record of a meeting or hearing.

See <http://en.wikipedia.org/wiki/Minutes>

Missions

Mission Details of a Work assignment which necessitates a travel, data include the destination, the other check-in and checkout ...

See <https://www.stratexapp.com/help/Mission.htm>

Mitigate See *Risk mitigation*

Naming Conventions

Conventions StratEx proposes naming **conventions** to facilitate the document management during the Projects

Non-working days Days that aren't taken into account when the planning is build

Off-specification This is a type of *risk*: Off-specifications are "something that should be provided by the Project, but currently is not provided (or is forecast not to be). This might be a missing product or a product not meeting its specification." [PRINCE2Revealed]

On Premise On-premises software is installed and run on computers on the premises (in the building) of the person or organization using the software, rather than at a remote facility, such as at a server farm or cloud somewhere on the Internet.

See http://en.wikipedia.org/wiki/On-premises_software

partagées Chaque membre de l'équipe est au courant du statut du projet, des dates de livraisons, des risques et des *problèmes majeurs*

Persons

Person A Person is an individual working on the Project. It can be a member of your team or a representative from your client.

See <https://www.stratexapp.com/help/Person.htm>

PMBOK *The PMBOK Guide identifies that subset of the Project management body of knowledge that is generally recognized as a good practice. "Generally recognized" means the knowledge and practices described are applicable to most Projects most of the time and there is a consensus about their value and usefulness. "Good practice" means there is a general agreement that the application of the knowledge, skills, tools, and techniques can enhance the chance of success over many Projects.* [PMBOK2013]

See also http://en.wikipedia.org/wiki/A_Guide_to_the_Project_Management_Body_of_Knowledge

PRINCE2 PRINCE2 (an acronym for Projects IN Controlled Environments) is a de facto process-based method for effective Project management. Used extensively by the UK Government, PRINCE2 is also widely recognized and used in the private sector, both in the UK and internationally. The PRINCE2 method is in the public domain, and offers non-proprietary best practice guidance on Project management.

See <http://www.prince2.com/what-is-prince2>

Private Cloud Private cloud is cloud infrastructure operated solely for a single organization, whether managed internally or by a third-party, and hosted either internally or externally.

See http://en.wikipedia.org/wiki/Public_cloud#Private_cloud

Problem/concern This is a type of *risk*: A problem/concern is “any other *issue* / concern / query / suggestion that the Project Manager needs to resolve or escalate.” [PRINCE2Revealed]

Problème/préoccupation C’est un type de *risque*: Un.e problème/préoccupation est “*tout autre :term: ‘problème majeur’ / préoccupation / requête / suggestion que le gestionnaire de projet doit résoudre ou remonter à un niveau supérieur.*” [PRINCE2Revealed]

Problèmes majeurs

Problème majeur Un terme utilisé pour couvrir un *problème/préoccupation*, une requête telle qu’une *Demande de changement*, une suggestion ou un *hors norme* soulevé pendant le projet. les termes peuvent se référer à tout aspect lié au projet.

Procedure A series of *actions* for a particular aspect of Project management established specifically for the *Project* – for example, a risk management procedure.

Processes You need to setup **processes** whether you are building a house, writing an answer to a call for proposal, complying with Food Drugs Association (FDA) regulations. StratEx proposes you to follow best practices set by famous methodologies like Prince2 Further reading [PRINCE2Revealed]

Processus Vous devez configurer vos **processus**, que vous construisiez une maison, que vous écriviez une réponse à un appel d’offres, que vous respectiez la réglementation sanitaire. StratEx vous propose de suivre les meilleurs pratiques de la célèbre méthodologie PRINCE2. Pour en savoir plus, lisez [PRINCE2Revealed]

Project A Project is a global entity containing contracts. It allows you to group the activities you have to perform.

See <https://www.stratexapp.com/help/Project.htm>

Project Assurance The Project Board’s responsibilities are to assure itself that the Project is being conducted correctly. The Project Board members each have a specific area of focus for Project Assurance, namely business assurance for the Executive, user assurance for the Senior User(s), and supplier assurance for the Senior Supplier(s). [Prince2Glossary2009]

Project Management Office abbreviated to PMO, is a group or department within a business, agency or enterprise that defines and maintains standards for Project management within the organization. [PMOWikipedia]

Proposal A proposal is the first step before a contract. It represents the description of the services you will offer under a contract.

See <https://www.stratexapp.com/help/Proposal.htm>

Public Cloud A cloud is called a “public cloud” when the services are rendered over a network that is open for public use.

See http://en.wikipedia.org/wiki/Public_cloud#Public_cloud

Quality assurance An independent check that products will be fit for purpose or meet requirements. [Prince2Glossary2009]

Query Queries form the basis of list-based reports that you can use to draw customised reports from StratEx.

See *Reporting > Queries menu*

Report Management products providing a snapshot of the status of certain aspects of the Project. [Prince2Glossary2009]

Reporting An activity that leads to a time-driven report from the Project Manager to the Project Board or a team

Reports See *Report*

Request For Action If you need to request something to stakeholder, it can be recorded via a Request For Action.

See https://www.stratexapp.com/help/Request_For_Action.htm

Request for change This is a type of *risk*: Request for a change is a “request that a change to one of the baselined products should be considered” [PRINCE2Revealed]

Request For Offer The Request for Offer starts the Proposal cycle. It represents that request you have received from your client to prepare a proposal.

See https://www.stratexapp.com/help/Request_For_Offer.htm

Risk This represents any risk you may identify on your Project(s) and allows you to manage them

See <https://www.stratexapp.com/help/Risk.htm>

Risk impact The risk impact is the evaluated effect or result of a particular outcome actually happening. [PRINCE2Revealed]

Risk mitigation Risk mitigation planning is the process of developing options and actions to enhance opportunities and reduce threats to project objectives [PMBOK2013]

Risk probability A Project risk probability is the evaluated likelihood of a particular outcome actually happening (including a consideration of the frequency with which the outcome may arise). [PRINCE2Revealed]

Risk types *PRINCE2* recognizes 3 types of issues: *request for change*, *off-specification*, and a *problem/concern*. [PRINCE2Revealed]

Risks Every Project is subject to constant change in its business and wider environment. The risk environment (Project risk) is constantly changing too. The Project’s priorities and relative importance of risks will shift and change. Assumptions about risk have to be regularly revisited and reconsidered, for example at each end stage assessment. [PRINCE2Revealed]

Risques

Risque Le risque est un événement considéré comme mal ou dommageable pour le projet, identifié sur votre projet et qui nécessite une gestion.

SaaS Software as a service is a software licensing and delivery model in which software is licensed on a *subscription* basis and is centrally hosted.

See http://en.wikipedia.org/wiki/Software_as_a_service

Service Order A **Service Order** means an order for Services served by the CUSTOMER on the CONTRACTOR in accordance with the Ordering Procedure and the agreed format which includes the Terms of Reference and any Special Terms.

Shared Every member of the team is aware of the status of the Project, its deadlines, risks and issues associated

Stakeholders

Stakeholder A Stakeholder represents an organization involved in the Project. It can be your organization, a partner, a supplier or your client.

See <https://www.stratexapp.com/help/Stakeholder.htm>

Structure de répartition du travail En gestion de projet et les systèmes d’ingénierie, il s’agit d’une décomposition des *livrables* d’un projet en composants plus petits tels que des produits, des données, des services ou toute combinaison de ceux-ci. [WorkBreakdownStructureWikipedia]

Subscriptions

Subscription StratEx comes with several business models depending on the customer needs; the user pays periodically (monthly or yearly) the use or access of StratEx. A free version of StratEx is available on top of the “Standard”, “Professional” or “Enterprise” versions

See <https://www.stratexapp.com/index.html#pricing-page>

User Acceptance Test User acceptance testing (UAT) consists of a process of verifying that a solution works for the user. [AcceptanceTestingWikipedia] It is not system testing (ensuring software does not crash and meets documented requirements), but rather is there to ensure that the solution will work for the user i.e. test the user accepts the solution (software vendors often refer to as Beta testing).

Word template A pre-developed page layout describing a certain type of report such as Meeting *Minutes*

See *Reporting > Word report templates menu*

Work breakdown structure In Project management and systems engineering, is a deliverable-oriented decomposition of a Project into smaller components such as a product, data, service, or any combination thereof. [WorkBreakdownStructureWikipedia]

Work packages

Work package A Work package is a building block of the work breakdown structure that allows the Project management to define the steps necessary for completion of the work. (e.g. Program management, Production Control Software, Testing, Deployment, Dissemination). A Work package belongs to a Work stream.

See <https://www.stratexapp.com/help/Workpackage.htm>

Work stream A Work stream defines high-level Project steps. A Work stream belongs to a contract.

See <https://www.stratexapp.com/help/Workstream.htm>

Work streams See *Work stream*

CHAPTER 5

Indices and tables

- `genindex`
- `search`
- *Glossary*

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Symbols

Événement, [57](#)
Événements, [57](#)

A

Acceptance, [55](#)
Action, [55](#)
Action (*fr*), [55](#)
Actions, [55](#)
Activités, [56](#)
Activities, [56](#)
Activity, [56](#)
Activity report, [56](#)
Activity type, [56](#)
Appel d'offre, [56](#)
Assurance, [56](#)

C

Commandes de services, [56](#)
Concession, [56](#)
Contrôler, [56](#)
Contract, [56](#)
Contracts, [56](#)
Control, [56](#)
Convention de nommage, [56](#)
Conventions, [58](#)
Corrective action, [56](#)

D

Deliverable, [56](#)
Deliverables, [56](#)
Demande de changement, [57](#)

E

Event, [57](#)
Events, [57](#)

F

Flux de travail, [57](#)

Follow-on action recommendations, [57](#)
Framework contract, [57](#)

H

Hors norme, [57](#)

I

iCal, [57](#)
iCalendar, [57](#)
Issue, [57](#)
Issues, [57](#)

J

Job scheduler, [57](#)

L

Livrable, [57](#)
Livrables, [57](#)
Logging, [57](#)
Lot de travail, [58](#)

M

Master data, [58](#)
Meeting, [58](#)
Meetings, [58](#)
Minutes, [58](#)
Mission, [58](#)
Missions, [58](#)
Mitigate, [58](#)

N

Naming Conventions, [58](#)
Non-working days, [58](#)

O

Off-specification, [58](#)
On Premise, [58](#)

P

partagées, [58](#)

Person, [58](#)
Persons, [58](#)
PMBOK, [58](#)
PRINCE2, [58](#)
Private Cloud, [59](#)
Problème majeur, [59](#)
Problème/préoccupation, [59](#)
Problèmes majeurs, [59](#)
Problem/concern, [59](#)
Procedure, [59](#)
Processes, [59](#)
Processus, [59](#)
Project, [59](#)
Project Assurance, [59](#)
Project Management Office, [59](#)
Proposal, [59](#)
Public Cloud, [59](#)

Q

Quality assurance, [59](#)
Query, [59](#)

R

Report, [59](#)
Reporting, [59](#)
Reports, [60](#)
Request For Action, [60](#)
Request for change, [60](#)
Request For Offer, [60](#)
Risk, [60](#)
Risk impact, [60](#)
Risk mitigation, [60](#)
Risk probability, [60](#)
Risk types, [60](#)
Risks, [60](#)
Risque, [60](#)
Risques, [60](#)

S

SaaS, [60](#)
Service Order, [60](#)
Shared, [60](#)
Stakeholder, [60](#)
Stakeholders, [60](#)
Structure de répartition du travail, [60](#)
Subscription, [61](#)
Subscriptions, [60](#)

U

User Acceptance Test, [61](#)

W

Word template, [61](#)
Work breakdown structure, [61](#)

Work package, [61](#)
Work packages, [61](#)
Work stream, [61](#)
Work streams, [61](#)