ACCSYS Reporting

S.Gysin, 2013-01-21

Below are the steps to complete the monthly reporting and submit deliverables for the Work Packages of the ACCSYS project.

ACCSYS has 12 work packages and each has a person responsible for monthly status reporting and submitting deliverables.

|  |  |  |
| --- | --- | --- |
| **WBS Code** | **WBS Name** | **Responsible for Status Reporting**  |
|  ACCSYS.1 | Management | **M.Lindroos**  |
|  ACCSYS.2 | Accelerator Physics | **H.Danared**  |
|  ACCSYS.3 | Normal Conducting Front End | **A.Ponton**  |
|  ACCSYS.4 | Spoke Cavities and Cryomodules | **S.Molloy** |
|  ACCSYS.5 | Elliptical SRF inc. Cryomodules | **C.Darve**  |
|  ACCSYS.6 | HEBT and Conventional Magnet Systems | **P.Ladd**  |
|  ACCSYS.7 | Beam Diagnostics | **A.Jansson**  |
|  ACCSYS.8 | Radio Frequency Systems | **A.Sunesson**  |
|  ACCSYS.9 | Installation | **G.Lanfranco** |
|  ACCSYS.10 | Test Stands  | **W.Hees**  |
|  ACCSYS.11 | Cryogenics | **J.Weisend**  |
|  ACCSYS.12 | Vacuum | **P.Ladd**  |

# Monthly Status Report

The monthly reports are to be submitted to Alfresco on **the 7th of the month**. The reporting period covers the first to the last day of the previous month. There are two forms to fill out: the Schedule Updates and the Monthly Reports.

Steps for monthly reporting:

1. Download the **current project status spreadsheet** from Alfresco.
	1. In Alfresco go to: Construction/WPL Reporting 2013/ and find the reporting period. For January 2013 this is:

<http://esss.idom.com:8080/share/page/site/ACC/documentlibrary#filter=path|%2FConstruction%2FWPL%2520Reporting%25202013>

* 1. Download the file called “ACCSYS Schedule Updates January 2013.xlsx”, where ‘January’ is always replace with the reporting period month.
1. Fill in the 3 fields for each activity under the work packages in the down loaded spread sheet:
* Actual Start: when the activity has started
* Actual Finish: when the activity has finished
* Remaining Duration : the remaining duration in weeks from the end of the reporting period
1. Upload the spreadsheet as: “**WPXX**\_ ACCSYS Schedule Updates January 2013.xlsx”, where XX is the specific WP number. Place it in Alfresco under: Construction/WPL Reporting 2013/<month>/Schedule Updates.
2. Down load the Work Package Status Report Template from Alfresco at: Construction/WPL Reporting 2013 :

<http://esss.idom.com:8080/share/page/site/ACC/document-details?nodeRef=workspace://SpacesStore/0d8c4289-0b66-4921-baf4-fed7f8d42358>

1. Fill out the text, and name the file **“WPXX** \_ACCSYS Monthly Report January.docx”. Where XX is the specific WP number and “January” is replaced with the current reporting period.
2. Upload the Status report to Alfresco under: Construction/WPL Reporting 2013/<month>/Monthly Reports.

## Actual Labor Units and Expense reporting for External Work Packages

For internal work packages, ESS uses the time reporting and invoices to track actual cost. For external work packages this information is not automatically available and has to be manually recorded. Therefore, we ask that for external work packages to report the “Actual Labor Units” and “Non Labor Expenses” on a monthly basis in this status report.

We realize that the hours and invoices at our collaborating laboratories may not be available by the 7th of the month. Therefore, the reporting period for these may lag by one month. The Actual Labor Units and the expenses should be reported cumulative, with a time stamp of the relative reporting period.

# Submitting Deliverables and Completing Milestones

The project plan has milestones with a date a deliverable is due. Milestones have no duration or cost, they are very binary, either complete or not. Each milestone has a tangible and physical deliverable that is to be delivered that day. For example, the meeting notes of a design review or the call for tender for the cavities.

Logistics of completing a milestone and submitting a deliverable:

1. The WP responsible emails the document to the Planning Manager (PM) (suzanne.gysin@esss.se) and notes what milestone this deliverable completes.
2. The PM checks it for logistical value and if it is acceptable, adds the following meta data to the document:
	1. revision
	2. timestamp
	3. sender’s name
	4. WP/WU and activity ID
	5. expected date
3. The PM uploads the deliverable to Alfresco at: /Construction/Deliverables
4. The PM marks the milestone complete in Primavera

At this time the milestone is considered complete.

Steps to review the quality of the deliverable:

1. Once the deliverable is uploaded to Alfresco, the PM notifies the management team (M.Lindroos, D.McGinnis, J.Weisend)
2. The management team reviews the deliverable for quality and technical content. If the deliverable needs revision, a new deliverable is scheduled to address the deficiencies or additions.