



SUBJECT: SPIRE Project Office Procedures

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Project Document

SPIRE Project Office Procedures

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Distribution

Livelihood



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Glossary



1. INTRODUCTION

The FIRST-SPIRE instrument will be provided by a consortium of institutes distributed across Europe, the USA and Canada. The Project Office has to provide the project-wide support necessary to allow these contributing partners to work together efficiently as a team. It does this by the collection, collation and distribution of project information, organisation of project meetings and supporting the SPIRE Principle Investigator (PI) and Project Manager in their work for the consortium.

In addition, the Project Office will provide support to the PM in discharging his management and reporting responsibilities towards PPARC and CLRC.

1.1 Scope

This document covers the procedures carried out by The Project Office.

1.2 Structure of Document

1.3 Documents

1.3.1 Applicable Documents

AD1 SPIRE Document Management Plan (SPIRE-RAL-PRJ-000032)

1.3.2 Reference Documents

RD1 Project Office Requirements (SPIRE-RAL-DOC-000184)

RD2 Configurable Documents' Tree (SPIRE-RAL-PRJ-000033)



2. PROCEDURES

2.1 Project Support

2.1.1 Update Address List

To maintain the address list for members of the SPIRE team

1. Open the database Q:/Project Office/Data SPIRE.mdb
2. To add/edit a person's information
 - a. Open the names table.
 - b. Add/Edit details including, name, telephone, fax, e-mail address, institute, role and group.
3. To add/edit an institute details
 - a. Open the Institutes table.
 - b. Add/edit full address of institute including the ID e.g. RAL, ATC.

2.1.2 ECR Distribution

ECRs are controlled by PA office. They are sent to the project office for distribution.

1. Send e-mail with the ECR attached to the names contained in the distribution list of the ECR.
2. Keep a copy of these e-mails in a folder on Outlook.

2.1.3 Finance Control

1. The Project office holds copies of all financial transactions made by SPIRE, e.g. Requisitions, Claims, Travel Requests, GPC purchases.
2. Each transaction will have a specific project code e.g. SBB2000 SPO, SBB2100 SIO etc., there is a separate Excel spreadsheet kept for each of these project codes found on Q/Admin/SPIRE Finances 200Y (Year).
3. Enter each monetary total from a transaction into the outstanding column on the SPIRE Excel spreadsheet with a brief description to identify the transaction.
4. After 21st of each month FRS has entered all transactions up to end of previous month.
5. Go to FRS, Flexible Detailed Transaction Listing and search for all SPIRE project codes individually in Last Closed Period, select latest month.
6. Print hard copy for each project code.
7. Check these copies for all payments; enter payments into the appropriate columns on each spreadsheet.
8. Remove the figure from the outstanding column.
9. Identify any mistakes and request correction by sending e-mail to DAO's office; keep copies of all requests for change for reference.
10. File hard copies of FRS print offs each month for reference.



2.1.4 Arrange Meetings

Future meeting dates are collected from minutes of previous meetings, notification by e-mail or by word of mouth.

1. Enter date, type of meeting etc. onto Access data base - Q:\Project Office\Data\SPIRE.mdb (open the Meetings table).
2. Maintain Meeting Types, go to Q:\Project Office\Data, SPIRE.mdb, open Meetings Types
3. Also enter meeting onto SPIREPRJ Calendar in Outlook
4. Book meeting room go to – Calendar – Action (toolbar) Plan a meeting - RAL Conf. (typed in at “all attendees”) click on “+ “ conference rooms shown, book available conference room following procedures or call 100 to book room.
5. Order refreshments – coffees etc., go to Q/Project Office/Coffee complete coffee template and send to Catering (RAL)
6. Provide list of names of attendees, conference room and contact name to security gate.
7. Confirm meeting room details to person calling meeting.
8. Check attendees are aware of meeting details.
9. E-mail attendees asking if they require accommodation for the meeting.
10. Make hotel reservations.
11. Confirm hotels to attendees.
12. Inform restaurant if extra numbers for lunch, over 10 persons.
13. Prepare name badges when over 10 person, distribute at RAL Security Gate.

2.1.5 Minutes of Meetings

Minutes are mostly received by e-mail:

1. Go to - Q disc - Q:\Project Office\Internal_Docs create new folder allocate next chronological number.
2. Save minutes to new folder, type reference to front page of new minutes using allocated number e.g. - SPIRE-RAL-MOM-123456, for ‘RAL’, use institute of author of minutes see SPIRE Document Management Plan (SPIRE-RAL-PRJ-000032) for Ref_Code examples.
3. Enter minutes onto Livelink <http://www.rssd.esa.int/l/ink/livelink> enter password.
4. On Livelink go to Projects - SPIRE/Other Documents/Meetings or check with Configurable Document Tree (SPIRE-RAL-PRJ-000033) to see which area on Livelink to enter minutes.
5. On Livelink enter relevant information and add document from Q:\Project Office\Internal_Docs / allocated number.
6. On Livelink hold cursor over headings e.g. General, Categories, Versions of the minutes added to Livelink, see unique number in the information bar at bottom of page. Add this number to Q:\Project Office\Data \SPIRE.mdb - ‘Meetings’ to ‘MOMID’ column also add minute reference number into ‘MOM’ column
7. Go to - Q:\Project Office\Data\SPIRE.mdb – ‘Actions’ to add new actions.
8. Allocate action item number using a “Meeting Type” abbreviation from Q:\Project Office\Data \SPIRE.mdb - ‘Meeting Types’ e.g. AIV, MAN. Use last 4 digits of minute reference number e.g. SPIRE-RAL-MOM-001234. Action reference number would be AI-



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AIV-1234-01 for the first action, AI-AIV-1234-02 would be second action etc. Complete all columns including clicking on 'Meeting' column and selecting actual meeting.

Note Items (7) and (8) suspended from January 2003

2.1.6 Self Sign Signatures

1. Signatures are sent to the project office to add to the accepted signatures file using an Acrobat Certificate Exchange File.
2. The file contains a copy of a certificate that you can use to verify signatures.
3. Opening this file will launch Adobe Acrobat and prompt you to process the file.
4. Certificates are filed on Q/Project Office/ Signatures.



2.2 Document Handling

2.2.1 Allocate a Document Number

To allocate a new document number for an author

1. Check type of document e.g. NOT, DOC, PRJ, MOM, DWG, REP etc. with the author
2. Refer to SPIRE Document Management Plan SPIRE-RAL-PRJ-000032 to define complete reference number.
3. Open folder Q\Project Office\Internal_Docs
4. Create a new folder with the next chronological number, the author's initials and 'todo' as the folder's name.
5. Notify the author of the full reference (The person will add the reference to the document and send document to Project Office on completion.)

2.2.2 Add/Update a Document

To handle a document supplied to the project office by the author

1. If the document is a 'Configured Document' execute the 'Handle Configured Documents' procedure
2. If the document is a 'Special Document' execute the 'Handle Special Documents' procedure
3. Locate the folder corresponding to the document reference number in the folder Q\Project Office\Internal_Docs.
4. Replace the author's initials and 'todo' with the document title if not already updated
5. Add the document file to the folder
6. Add the document to Livelink.

2.2.3 Handle Special Documents

To handle a special document supplied to the project office by the author

1. Locate the folder corresponding to the document reference number in the folder Q\Project Office\Internal_Docs\Special.
2. Replace the author's initials and 'todo' with the document title if not already updated
3. Add the document file to the folder
4. Add the document to Livelink.
5. Open the Q:/Project Office/Data SPIRE.mdb database
6. Open the Documents table.
7. Update relevant document information whenever there is a new issue.

2.2.4 Handle Configured Documents

To deal with project-controlled documents as received from the author. These documents are received by the Project Office unsigned.



1. Locate the folder corresponding to the document reference number in the folder Q:\Project Office\Internal_Docs.
2. Replace the author's initials and 'todo' with the document title if not already updated
3. Add the document file to the folder
4. Add to Livelink in the Draft Documents area.
5. Place document in folder Q:/In Tray/Documents to Sign by the PA office.
6. The PA office sends the SPIRE project office the signed documents for verification.
7. Open document, login to self signed security, verify all signatures.
8. Add document to the correct area in the Configured Documents section on Livelink.
9. Go to the Livelink Draft Document area, find draft version of the document and attach configured message from Q:/Project Office/Internal Docs/000000/Replacement Message/Configured. This message points the user to the version in configured area.
10. If the document is a special document go to procedure Update Special Documents List

2.2.5 Adding Documents to Livelink

1. Log on to Livelink at <http://www.rssd.esa.int/l/ink/livelink>
2. Check if the document is a first issue or a re-issue by searching Livelink using the title or any local reference on the document.
3. If Livelink cannot find a match treat as a first issue, if Livelink finds a match treat as re-issue.
4. For first issue document - check document for type e.g. Minutes, Project Document, Document etc. see SPIRE-RAL-PRJ-000032, the SPIRE Document Management Plan for numbering documents. See also "Document Number Allocation" Project Office Procedures.
5. Add reference number to top right of front page of document where necessary.
6. Go to correct area in Livelink, see SPIRE-RAL-PRJ-000033, Configurable Documents' Tree for different areas, enter details and attach document from folder held on Q/Project Office/Internal Documents folder containing document.
7. For re-issue document – search Livelink for this document, search by reference number or title.
8. Add new version and update details.



2.3 Laboratory Procedures

2.3.1 Car Hire - UK

To arrange car hire for travel within the UK

1. Contact Transport Department located in R54. Extension number 5317; fax number 5469.
2. Request form for car hire in UK, complete and return to Transport Department.

2.3.2 Printer and Fax Machines

1. Both Phaser 6250 printer and Nefax 595 fax machine are located in R25, 1.69.
2. Keep paper tray full in Phaser 6250 printer.
3. All consumables are kept by Jeff Payne, R25, 1.75
4. Replace all consumables when necessary.
5. Keep paper tray full in Nefax 595 fax machine
6. Keep supply of NEC toner "Toner for NEFAX 505/555/565/595", call Tel. 01442 828 188 to reorder using GPC.

2.3.3 Requisitions Orders

1. A requisition is produced by the requester and given to the project office to process. Take the completed requisition to the DAO's office for processing and file a hard copy in the project office.
2. The project office is asked to make the order by either completing a requisition template, stored under Q/Project Office/Forms and Maps, or by using the GPC (Government Procurement Card).
3. Where a requisition is required, take the completed requisition to the DAO's office for processing and file a hard copy in the project office.
4. Check each transaction has the correct project code e.g. SBB2000 SPO, SBB2100 SIO. There is a specific code for each work package on SPIRE.
5. Where a GPC transaction is required, give the card details to the company plus the delivery address when making the order. Keep hard copies of the transaction. Complete the transaction log on Q/Admin/GPC_JAL. Enter the project code to be charged into the appropriate column.
6. Enter details of all transactions onto Excel spreadsheet on Q/Admin/SPIRE Finances 200Y (Year).

2.3.4 Taxi Booking

1. Call Transport on Ext. 5317, confirm details and project code.
2. Confirm booking to traveller.
3. For person paying own fare call local taxi company e.g. Pryor's 01235812345 or Harold's 01235512345



2.3.5 Train Booking

1. Confirm details with traveller.
2. Call Travel desk on Exts. 6184, 6718, 5231 to confirm rail travel, give appropriate project code to order rail ticket.
3. Collect ticket, deliver to traveller.

2.3.6 Travel Booking

1. Negotiate convenient times with traveller call Travel office on Exts. 6718, 6184 or 5231 for flight availability.
2. Confirm flights with traveller call Travel office to give flights, name of traveller.
3. Travel Authorisation form will be sent from Travel Desk by e-mail.
4. Complete Travel Authorisation form with traveller's home address (only when RAL taxi is required), Project code, tick option box (probably always Option 1), purpose of visit, destination and if car hire is required.
5. Travel Authorisation form to be signed by project manager and division head, for outside Europe the department head must also sign.
6. Fax form to Travel Office on Fax. 6191.
7. Enter travel information onto Excel spread sheet on Q/Admin/SPIRE Finances 200Y (Year)
8. Electronic tickets sent by e-mail non electronic to collected from Travel Office.
9. Deliver to traveller.
10. File hard copy of Travel Authorisation form in project office.