

# CTA consortium FTE checking HowTo

September 9<sup>th</sup>, 2013

## Scope

This short notice describes the FTE checking procedure for **party representatives**. Party representatives are the individuals who represent a party in the CTA consortium board (CB). Some of the CTA parties are composed of several groups, each of which has a group representative. In general, one of the group representatives is also the party representative.

## Rational

At the May 2011 CB meeting in Toulouse, it has been decided that the voting rights of a party are conditional to the checking of the FTE numbers before the CB meetings. FTE checking consists of verifying that the declared numbers are consistent with the true efforts of people within the CTA consortium, and that the end date for leaving members are set properly. **The responsibility of the FTE checking lies with the party representatives**. Party representatives may delegate the actual checking to group representatives, but the party representatives need to collect the information and to declare that the FTEs have been checked according to the procedure below.

## Evolutions since the Chicago meeting

In the past, the FTE checking had been implemented by a check-box that was associated in the edit form of each member. As this implied quite some manual Sharepoint configuration management for every meeting, it has been decided to replace the check-box by a check-button that will automatically set the date at which the FTEs have been checked. It is thus now the last FTE check-date that will be used to derive whether FTEs have been checked properly or not.

For example, if an FTE check is asked for on Monday, September 9<sup>th</sup> 2013, only parties that have a FTE check-date that is equal or later than Monday, September 9<sup>th</sup> 2013 will have voting rights at the next CB meeting.

Independently of the voting rights and an FTE check request, it is highly recommended to perform a regular FTE check (for example once per month) to make sure that the FTE numbers are always up to date. The CTA publication authorlist is now automatically derived from the consortium membership database, hence without an up-to-date database, no CTA authorship can be guaranteed.

## Procedure

The FTE check procedure has two steps: (1) verification that the membership information and FTE numbers are set correctly, and (2) acknowledging that the verification has been done.

## Verification step

The verification of the membership information and FTE numbers is done at the address

<https://portal.cta-observatory.org/Bodies/ProjectOffice/Lists/People/Overview%20FTEs.aspx>

Go to your country, click on the “+” in order to expand the country, find your party, click on the “+” in order to expand the party, and walk through the members of your party to update the FTEs according to the real efforts invested.

If a new member has joined, go to the bottom of the Sharepoint page and click on the “Add new item” link. Fill-out the form, and fill the FTE numbers according to the expected and agreed contribution of the new member. Don’t forget to “Save” the data with the button at the top of the form. Hint: FTE percentages can be entered quickly as a three-digit number (e.g. 020 for 20%) moving rapidly from field to field.

If a member has left, don’t try to delete his record, but set the end date to the date when the member left. Members that leave will be kept for one year after the end date in the database, so that they still will appear on the CTA consortium publications. **Never replace the data of an existing member in the database by those of a new member.**

## Acknowledgment step

Once the verification step is done, the acknowledgment step is done at the address

<https://portal.cta-observatory.org/Bodies/ProjectOffice/Lists/People/FTEs%20checked.aspx>

Party representative, find your name, open your edit form, and press the “I declare all FTE values checked” button in the light blue field. The current date will appear in the yellow field entitled “Last FTE check made on” to the right of the button (see image below). Note that the button and yellow field does only exist for party representatives. If you do not see such a field you’re not declared as party representative. Please contact your party representative to make that FTEs are acknowledged.

This completes the procedure.

FTE Contributions to Work Packages (Percentage in range 0 - 100%)			
MAN:	CPM (Central Project Management):	DATA Management:	QMT (Quality Management):
0.00	0.00	50.00	0.00
GOVpp (Gov., Legal, Finance, Proc.):	COM (Common Components):	INFRA (Infrastructure):	ACTL (Array Control):
	20.00		
SST:	MST:	LST:	SCT:
PHYS (Physics):	MC (Monte-Carlo):	SUG:	IOS (IRD, Outreach):
10.00			
other:			

Edit form of a party representative.