



# How we run implementation projects for **Elements** and **Figshare**

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Provided by **Customer  
Solutions**, Digital Science

# THIS IS YOUR PROJECT

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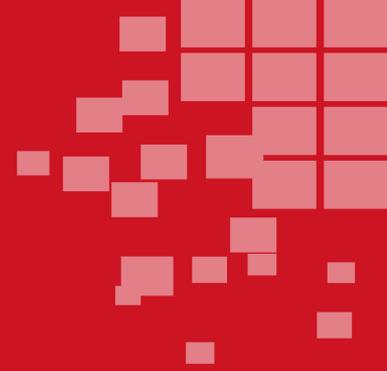
**BUT** we want to **HELP** you to ensure that you have a successful implementation of our products.

## To help with this,

- We have a **project framework** that we follow.
- We have some guidelines for **managing the project**.
- We have a **project management tool** that we use.
- And we urge you to do some **further reading**, before we get going.

# Our project framework

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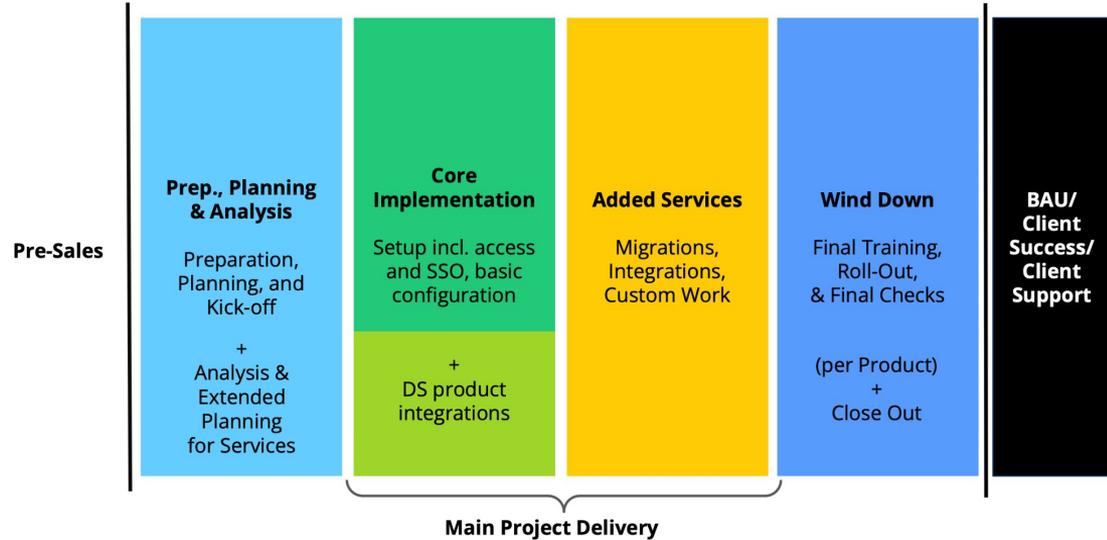


# PROJECT PHASES

We want to **deliver value early**, and focus initial efforts on the **Core Implementation**, which will give you access to our products sooner. Alongside that phase, we start preparing for the **Added Services** that are included in the scope of your project.

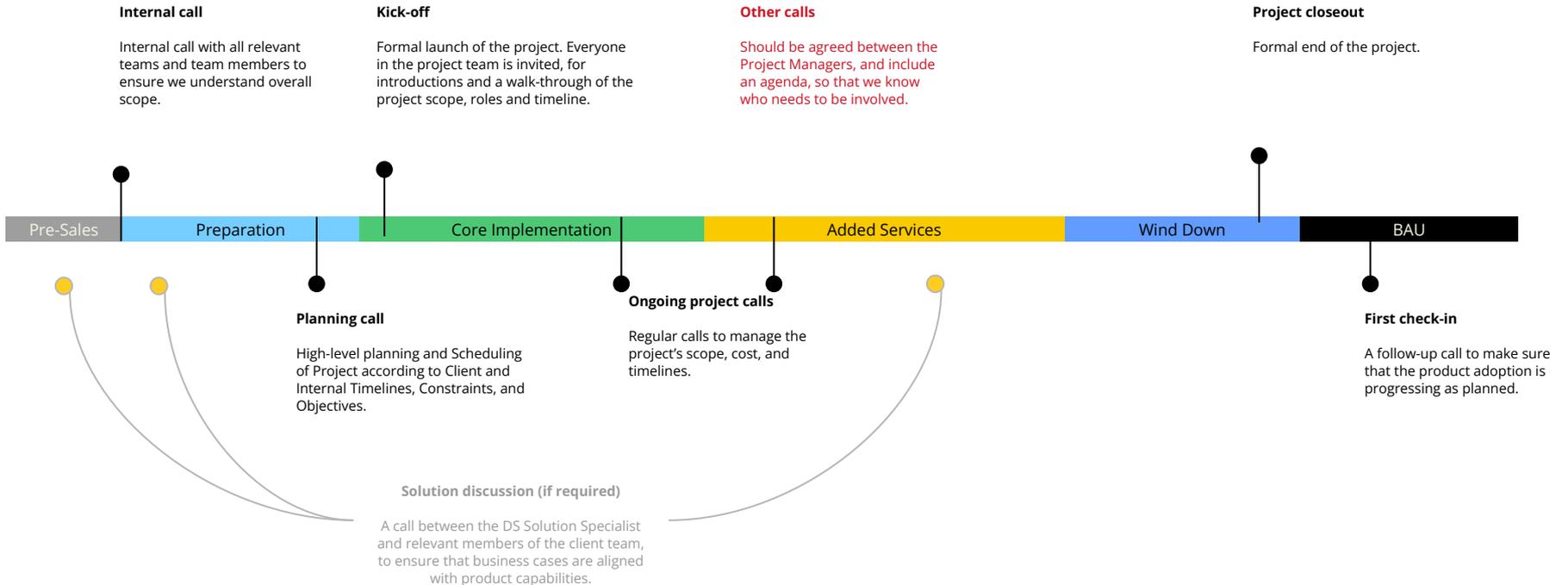
## Phases

1. Pre-Sales
2. Preparation, Planning & Analysis
3. Core Implementation
4. Added Services
5. Wind Down
6. BAU



# PROJECT EVENTS

This timeline includes the main events in all projects, mapped against the different phases



# PROJECT ROLES AND EVENTS



PHASES	PRE-SALES	PREPARATION			PROJECT: CORE IMPLEMENTATION	PROJECT: ADDED SERVICES	WIND DOWN		BAU	
PRIMARY CLIENT CONTACT	Sales/Account Manager	Head of Projects			Project Manager			Customer Engagement Manager		TBC
EVENTS	Solutions Discussions	Internal Call	Further Solutions Discussions	Planning Call	Kick Off	Ongoing Project Calls	Further Solutions Discussions	Training programme	Project CloseOut	First Check-In
PURPOSE	To ensure products and services bought meet Customer use cases	To hand over a new sale to Delivery and Customer Engagement, ensuring use cases and scope is understood	To further discuss Customer use cases, and Support new customer with Implementation Questionnaire	To align expectations about scope and timelines before the project officially starts.  Agenda: - Introductions (roles) - Review of questionnaire (scope) - Sketching a high-level timeline (time)	To formally start the project.  Agenda: - Introductions (project roles) - Review of Project Brief - High-level timelines - Introduce Asana project - Review the immediate priorities of the Project - Ongoing Project Call (timing, frequency)	To protect project scope, timelines, and Customer Use Cases.  Agenda: - Monitor progress against - Project End Date - Resolve issues - Agree on next steps	To clarify, explore in greater detail, and possibly review requirements and questions for Additional Services.			
Sales/Account Manager	Facilitates	Attends	Doesn't attend	Attends	Doesn't attend	Doesn't attend	Doesn't attend	Doesn't attend	Doesn't attend	Only as needed
Project Manager	Doesn't attend	Only as needed	Only as needed	<b>Leads</b>	<b>Leads</b>	<b>Leads</b>	Only as needed	Only as needed	<b>Leads</b>	Doesn't attend
Solutions Specialist	<b>Leads</b>	Only as needed	<b>Leads</b>	Only as needed	Only as needed	Only as needed	<b>Leads</b>	Doesn't attend	Doesn't attend	Doesn't attend
Customer Engagement Manager	Doesn't attend	Attends	Only as needed	Doesn't attend	Attends	Doesn't attend	Doesn't attend	<b>Leads</b>	Only as needed	<b>Leads</b>
Support Manager	Doesn't attend	Doesn't attend	Doesn't attend	Doesn't attend	Attends	Only as needed	Doesn't attend	Doesn't attend	Doesn't attend	Only as needed
Technical Specialists	Doesn't attend	Doesn't attend	Doesn't attend	Doesn't attend	Only if specialist project	Only as needed	Only as needed	Doesn't attend	Doesn't attend	Doesn't attend
Head of Projects	Only as needed	<b>Leads</b>	Only as needed	<b>Leads</b>	Only as needed	Only as needed	Only as needed	Doesn't attend	Doesn't attend	Only as needed
Client Business Owner(s)	<b>Attends</b>	Doesn't attend	<b>Attends</b>	Only as needed	<b>Attends</b>	Only as needed	Only as needed	Only as needed	<b>Attends</b>	<b>Attends</b>
Client Project Manager	Only as needed	Doesn't attend	Only as needed	<b>Attends</b>	<b>Attends</b>	<b>Attends</b>	Only as needed	<b>Attends</b>	<b>Attends</b>	Doesn't attend
Client Team	Doesn't attend	Doesn't attend	Doesn't attend	Doesn't attend	<b>Attends</b>	Only as needed	Doesn't attend	<b>Attends</b>	Only as needed	Doesn't attend
OUTCOMES	Contract Signature + SOWs	Welcome email + send questionnaire	Completed questionnaire with full understanding of scope	Project Plan (high level) and Project Brief	Everyone understands the scope, their roles, and the project plan	Project Status	Updated project plan (if required)	TBC	Archive Asana project	TBC

# QUESTIONNAIRE / SURVEY

To get your project off to a good start, we work with you to complete a short questionnaire/survey, late in *Pre-Sales* phase or early in the *Preparation, Planning & Analysis* phase

## The artefacts:

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- **Symplectic Elements**, Implementation Questionnaire
- **Figshare**, Implementation Questionnaire
- **Moving to Symplectic Hosting**, Move to Symplectic Hosting Survey

# CONTACTING US

To help you before, during and after your project, we provide you with set of distinct roles for support.

## Please contact

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- Your **Account Manager**, for commercial support;
- Your **Project Manager**, for project support;
- Your **Customer Engagement Manager**, for product adoption support;
- Your **Client Support Manager**, for day-to-day support.
  - Elements: *support@symplectic.co.uk* and <https://support.symplectic.co.uk/>
  - Figshare: *support@figshare.com* and <https://support.figshare.com/>

# PROJECT ESCALATIONS

Escalations are concerns that you (or we) want to raise the profile of, to safeguard the project or members of the project team.

We recommend that escalations are raised via email to *Escalation level 1* in the relevant *Area of concern*.

Area of concern	Escalation level 1	Escalation level 2
<b>Commercial</b>	Your Account Manager	VP Sales for Segment
<b>Product</b>	Jackson Anderson, <i>Director of Product</i>	Kate Byrne, <i>SVP Product</i>
<b>Project</b>	Kay Lino, <i>Head of Project Services</i>	Geirmund Knutsen, <i>VP Client Services</i>
<b>Support</b>	Youssef Karnib, <i>Head of Support</i>	Rachel Segal, <i>SVP Customer Success</i>

# Managing the project



# (TIME) WHEN CAN WE START?

It is important to have conversations about the **start** and **end** of a project. Typically, these begin in the *Pre-Sales* phase, and continue in the *Preparation, Planning & Analysis* phase.

## Here is what matters

The start of a project depends on a couple of things:

- **Contracts** - we need at least the Digital Science General Terms and the Order Form (with SOW1) countersigned before we can kick-off a project officially. The *Preparation, Planning & Analysis* phase, however, is likely to start sooner.
- **Resourcing** - we always manage a large number of projects concurrently, and a new project will be scheduled in alongside all other work.
  - Before the contracts are signed, we pencil in the 'month' a new project is likely to start.
  - When the contracts are signed, we pencil in the 'week' a new project is likely to start.

Note: If there are delays with the contracts, then the project start is also likely to be delayed.

The end of a project depends on a few things:

- **Scope** - it is important to establish what 'go-live' means, as it will determine how much work has to be done to get there.
  - A first go-live can happen sooner with fewer deliverables included - delivering value earlier.
  - A 'big-bang' go-live with the full scope included, is not recommended unless the scope is small.
- **Resourcing** - requests to do everything in parallel are understandable but rarely conducive to a successful project. Ideally, resources are involved with the project when they are needed.
- **Contracts** - if there are delays with the contracts at the start, then it is not just the start of the project that moves but also the end of the project.

# (COST) IS FIXED

Although the entire project is fixed-cost, and there is no explicit provision for project management, we allocate a DS Project Manager to your project, and we make available the resources that you need to succeed.

## In return, we ask

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- That we mutually agree a **Project due date**, so that we have a shared target;
- That the **ongoing Project calls** are dedicated to managing the project, so that we keep the focus on the central business case and timeline;
- That any **other calls** that may be required, are agreed between the Project Managers, and include an agenda, so that we know who needs to be involved;
- That we embrace **asynchronous work**, as a lot can be achieved outside of meetings, particularly with a team distributed across time zones;
- And that we revisit the **Project due date** when necessary.

# (SCOPE) WHAT IS INCLUDED?

It is important to keep an eye on the prize and protect the original scope of the project, as this will ensure that the original business case is met.

## In general

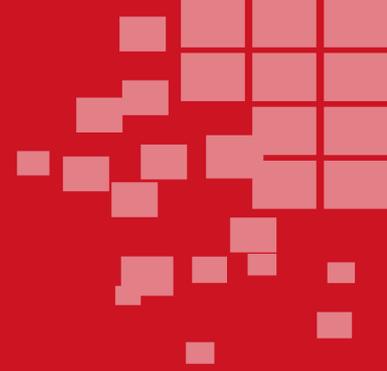
In scope:

- **Contracted work** - we will work with you to get you to a place where you are happy to confirm the Acceptance Criteria in the countersigned *Statements of Work*.
- **Project Management** - although this is not explicitly included in the scope, you will have an allocated a DS Project Manager for the duration of your project.
- **Product Training** - we provide the necessary knowledge that you require to progress your project, but we will also ask you undertake necessary self-learning activities.

Outside of scope:

- **Not-contracted work** - if we are asked to undertake work that is not included in the countersigned *Statements of Work*, we may suggest that you use available [Support Hours](#) to cover this.
- **Non-existing product features** - unless a new feature is part of your contract, the project's focus is on solving your use cases with existing features. Feature requests can be added to the appropriate community forums.
- **Product Learning** - we do not typically provide in-depth training on product capabilities during a project.

Note: If the scope needs to be changed, we ask you to raise this with the DS Project Manager.



# Project management tool (Asana)

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# COLLABORATION

We use [Asana](#) to manage implementation projects at Digital Science. This is cross-functional tool that allows us to collaborate with you and other parts of Digital Science.

## In general

Features:

- **Overview** - a description of the project, project members and roles, and project milestones
- **List view** - the list of tasks that are involved in the project, organised in natural sections, depending on the scope of the project
- **Timeline / Gantt** - a visual representation of the project tasks, including dependencies

Collaboration:

- **Commenter access** - we will provide you with Commenter access to the project, which allows your project team to collaborate on relevant tasks.
- **Status update** - we will provide regular status updates in Asana, which provides you and Digital Science the visibility required for all to monitor progress.

# Further reading

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# Symplectic Elements

There is no need to read all this now, but we recommend that you come back to this list when you need questions answered

- [Symplectic Elements for beginners: Orientation videos](#) is a series of short video demonstrations aimed at helping new-starters navigate the Symplectic Elements system.
- [How does Symplectic Support work?](#) is a short article that describes how we manage Business-as-usual support, once you have gone live.
  - [Symplectic Elements Service Level Agreement](#) is the article that sets out how our service levels are governed.
  - [Support Hours](#) is an article that describes the terms of any Support Hours you may have purchased.
- [How things work when you're hosted with Symplectic](#) is an article that answer some of the most frequently asked questions about how things work when you are hosted with Symplectic.
- Depending on the scope of your project, you are likely to find the documentation you need here:
  - [Implementing Elements](#)
  - [Discovery Module](#)
  - [Elements API](#)
  - [Repository Tools and OA Monitor](#)
  - [Reporting Database](#)
  - [Reporting Hub](#)
  - [Assessment Module](#)
- Security
  - [Introduction to Data Privacy and Personal Data in Elements](#) is an article that provides a high-level overview of the levels of privacy supported in the design of Elements.
  - Available on request are: *Digital Science Information Security Policies*, *Symplectic Information Security Policy Addendum*, *Digital Science Data Protection Policy*, *Symplectic Elements Security*, *Symplectic Elements HECVAT Lite*, *Symplectic Elements Disaster Recovery Plan*, *Symplectic Security Incident Response Plan*, *Business Continuity Plan*, and *GDPR Compliance Attestation Letter*.
- [Symplectic Elements accessibility statement](#) is an article that details Symplectic Elements conformance with accessibility standards.

Note: Your domain will be whitelisted for access to our Knowledge Base

There is no need to read all this now, but we recommend that you come back to this list when you need questions answered

- Figshare User guides: These videos and guides contain all the information that users and admins need to get started with using Figshare
  - [Admin user guides](#)
  - [Admin user video playlists](#)
  - [End user guides](#)
  - [End user video playlists](#)
- [How does Figshare Support work?](#) is a short article that describes how we manage the transition from implementation project to Business-as-usual support, once you have gone live.
  - [Figshare Service Level Agreement is the article that sets out how our service levels are governed](#)
- Security
  - [Figshare's approach to security and stability](#) is an article that provides a high-level overview of the levels of privacy supported in the design of Figshare
  - [Public policies are available on the Help Site](#), but further policies and information are available on request.
- [Figshare Accessibility Standards](#) is an article that details Figshare's conformance with accessibility standards and future plans in this area.

**For questions or comments,  
please contact**

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