This deliverable describes the plan for training first open call experimenters in using the facility including explicit learning objectives, schedule and consortium responsibilities. The document provides all project partners with a description of what commitments will be needed to train users during the first open call.
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| Version | 1.0 |
| Status | Final |
| Dissemination level | PU: Public |
| Due date | PM10 (2012-07-31) |
| Delivery date | 2012-10-25 |
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1. Introduction

This document describes the commitments undertaken by the EXPERIMEDIA “core consortium” to train the new partners joining the project through the 1st open call on all aspects required to enable the latter to fully familiarise themselves with the particularities of the project, so as to appropriately design and conduct their experiments. It should be stressed that training in EXPERIMEDIA is of crucial significance, even more so than in other research projects, since its aim is not limited to dissemination, but involves getting new partners up to speed to full joining an already running project. Therefore, the new partners should undergo a training process which will be carefully designed to include all necessary information and resources, as well as foresee any predicaments and have readily available plans to tackle them.

In this document an extensive analysis of the training strategy is presented. The training process is designed to comprise two segments: a “waterfall” schedule of basic training activities taking place sequentially and a “random-access” segment which ensures full access of the trainees to all necessary information at all times as well as the timely provision of assistance of any kind whenever this is required. Section 2 describes the training phases that compose the aforementioned two segments, in terms of the activities and partners involved, the resources needed and the schedule defined. Section 3 details the content of the training, providing a “syllabus”, and finally Section 4 concludes the document with a brief discussion.
2. The training process phases

The training process for new partners conducting new experiments on the EXPERIMEDIA facility enacts the following process:

- A “waterfall” schedule of basic training activities takes the new partners through a predetermined sequence of steps, each providing a necessary amount of knowledge, and each depending on the previous step and providing prerequisites for the following steps.
- Well provisioned access of the new partner to all necessary information at all times (the “random access” segment of the process), so that whenever the partner
  - needs additional help
  - and/or
  - determines that
    - previously learned information needs to be reviewed
      - and/or
    - information scheduled for later training according to the training plan should be previewed early
  then this information is readily available to the new partner.
- At every point in the training process, assistance from the respective technical and other partners of the original EXPERIMEDIA consortium is always available.

Figure 1 depicts the phases of the training plan comprising the above mentioned “waterfall” and “random-access” segments, briefly referring to each phase’s activities, partners involved, resources needed, and scheduled time of realisation. A detailed description of the phases follows the figure.
Figure 1. The training plan of EXPERIMEDIA comprises a “waterfall” segment (upper row) and a “random access” segment (lower row). The rows of the tables (each table representing a phase) correspond to the phase’s title, activities, partners involved, resources, and schedule respectively.
2.1. The “waterfall” segment
The “waterfall” segment of the training plan consists of the following phases:

1) Introduction to EXPERIMEDIA project
2) Review of experiment definition
3) Detailed technical study: feasibility and training
4) Legal and Ethical considerations

The subsections that follow describe these four phases in detail.

2.1.1. Introduction to EXPERIMEDIA project

• Title:
  - Introduction to EXPERIMEDIA project

  This activity is aimed to introduce the new partners to EXPERIMEDIA. They have a lot to learn, and must address several issues of different types: reading documentation, and understanding software components; finding out how to use EXPERIMEDIA in the simplest and most efficient way, and finding out how to use EXPERIMEDIA respecting its important ethical guidelines; getting acquainted with the assets of the Venues and understanding their needs, which they should contribute towards, and respecting the experimental (as opposed to simple application-developing) nature of the project. Therefore, in this activity, a first contact with all of these matters is achieved. Remote collaboration of the new partner with previous EXPERIMEDIA partners starts the process, and the activity culminates in a face to face meeting at the Venue that will host the experiment in question.

• Activities:
  - Introductory teleconference

    It is most efficient to start contact between previous and new partners with a teleconference. A lot of initial information can be conveyed sufficiently well this way, especially using an online-shared presentation. This initial discussion is also sufficient background for the new partners to study the written materials EXPERIMEDIA has produced so far. All these activities will lead to a very productive face to face meeting between well informed participants soon afterwards.

  - Read project documentation

    The new partner can now study the EXPERIMEDIA project documentation in isolation. There is a lot of highly informative documentation available with regard to the architecture behind the EXPERIMEDIA facility and its main building blocks (D2.1.3 “First Blueprint Architecture”), the driving experiments for each Venue (D4.1.1 “Schladming Experiment Design and Plan”, D4.1.2 “CAR Experiment Design and Plan” and D4.1.3 “FHW Experiment Design and Plan”), and this can
only be read, as it would take too long to convey all the available information in presentations.

- Browse EXPERIMEDIA project software components and Venues’ assets

The new partner can also familiarise themselves with the EXPERIMEDIA facility’s software components:

- Experiment Content Component (ECC)
- Social Content Component (SCC)
- Audio Visual Component (AVCC)
- Pervasive Content Component (PCC)

and the technologies supported (D2.2.1 “EXPERIMEDIA Baseline Components”). It is beneficial to browse the documentation and "play with" the software components (D2.3.3 “First Major Software Release”). Additionally, browsing through the Venues’ assets inventory (D3.1.1 “First Assets Inventory”) would give new users a good idea of what the Venues have to offer.

- Meeting at Venue

Once the new partner has covered the background that can be learnt remotely, a meeting at the Venue is held. This meeting covers all material that the new partner should be trained in (documentation, software components, exploitation of the EXPERIMEDIA Facility, ethical guidelines, needs and other constraints of the Venue, experimental nature of the EXPERIMEDIA). Understanding of the Venue requires physical presence at the Venue, hence the location of the meeting there. All other topics can be studied using printed material and/or on a computer, but face to face discussion of this content facilitates its rapid absorption by the new partner and ensures any misunderstandings are clarified effectively.

- Partners involved:
  - Co-ordinator
    
    The co-ordinator has a complete technical view of the project, and can fully cover the new partner’s training needs at this introductory phase.
  - Related Venue
    
    The Venue partner is also present as host, and to elucidate the subtle requirements and opportunities that the Venue offers.

- Resources:
  - Access to repositories
    
    The new partner will need full access to all related EXPERIMEDIA documentation and software components from the very start of the training process, according to
this plan. There are two main repositories: a documents repository, where all deliverables and reports are stored, and a software repository, where the code and its documentation are kept.

- Teleconference

The very first activity is a teleconference. This is easy to perform, e.g. using Skype it can be done at no cost.

- One face to face meeting

A face to face meeting has been budgeted and planned by the project, and it will be very useful to conduct it as the conclusion of this phase, so as to very efficiently train the new partner, when the new partner has made a first pass of all the EXPERIMEDIA content but is likely still full of interesting questions, can learn more quickly with detailed discussion and extensive clarifications, and needs to acquire a personal intuition of the constraints and opportunities offered by the Venue of the experiment.

- Schedule:
  - Start: time 0

  This is the first training phase, and commences as soon as the new partner joins the project.
  
  - End: after 1 month

  Due to possible constraints on organising a face to face meeting, up to 1 month may be required for this phase, although it will be good to complete this phase faster if possible.

2.1.2. Review of experiment definition

- Title:

- Review of experiment definition

  Once the first phase of the training plan is completed, the new partner – with the role of experimenter – and the Venue – with the role of experiment host – as well as the technical partners supporting the experiment, will all study the results of the face to face meeting offline, and perform a reality check that every aspect of the experiment is desirable, feasible, correctly planned. Changes can now be made if necessary to optimise the experiment.

- Activities:

  - Teleconference with Venue and technology providers
A teleconference will be held to discuss any necessary or suggested improvements to the experiment.

- Partners involved:
  - Related Venue
    The Venue partner for the experiment ensures that the experiment is optimally defined to benefit the Venue, with realistic and useful experimentation making realistic use of the EXPERIMEDIA Facility.
  - Related technical partners
    The technical partners supporting the experiment ensure that the experiment is optimally defined to make successful use of their components in the context of an EXPERIMEDIA experiment, making realistic use of the EXPERIMEDIA Facility, benefiting the Venue, and performing realistic and useful experimentation.
    The new partner also ensures that the experiment is optimally performing realistic and useful experimentation, making realistic use of the EXPERIMEDIA Facility, and benefiting the Venue.
    Any necessary changes are agreed upon and documented by the new partner. Of course, these changes must remain within the scope of the new partner’s role as defined in the EXPERIMEDIA Description of Work.

- Resources:
  - Teleconference
    This is easy to perform, e.g. using Skype it can be done at no cost.

- Schedule:
  - Start: after introduction
    This phase immediately follows the introduction of the new partner to EXPERIMEDIA.
  - End: within 1 week
    This phase is completed within a week, during which all related partners ensure that the conclusions drawn from the previous phase are correct and the experiment is optimal or decide how to optimise it.

2.1.3. Detailed technical study: feasibility and training

- Title:
  - Detailed technical study: feasibility and training
Now that the definition of the experiment has been concretely confirmed at a high level, the new partner needs to train to the level of conquering all the technical details that will be required for conducting the experiment. Familiarity with using the technical components of the EXPERIMEDIA Facility in practice needs to be acquired. The exact usage that will be made of these components needs to be understood. Since the new partner is also expected to perform any software development work that is necessary in order to adapt the generic technical components of the EXPERIMEDIA Facility to the particular experiment, the feasibility of fully relying on the EXPERIMEDIA Facility needs to also be tested. Furthermore, since some small gaps are indeed expected to be found, a design should be created defining the software development task of the new partner. For this process, the technical partners providing the respective technical components of the EXPERIMEDIA Facility will work together with the new partner, so that the new partner effectively and efficiently learns the necessary technical details of these components.

- **Activities:**
  - Technical teleconferences with each individual technical partner
    
    Each related technical partner will provide one on one close technical support to the new partner to any extent required.
  
  - Rapid prototyping by experimenter

    The new partner needs to create a first prototype of the software that will be required for the experiment, concentrating on the use of the technical components of the EXPERIMEDIA Facility (as opposed to e.g. the user interface for the experiment subjects, the manipulation of the data collected by the experiment, etc., because the new partner is fully in control of these aspects of the software and can focus on them individually at the appropriate point in time). This way, concrete support can be offered by the technical partners, addressing any actual issues that arise when using the EXPERIMEDIA Facility for the experiment.

- **Partners involved:**
  - Related technical partners

    Technical partners will provide all necessary details for the new experimenters to fully understand the functionality and characteristics of EXPERIMEDIA’s components.

- **Resources:**
  - Access to repositories

    Full access to all related EXPERIMEDIA documentation and software components is required.
  
  - Teleconference
This is easy to perform, e.g. using Skype it can be done at no cost.

- Software documentation
  
  Documentation describing the technical details of the components is available in the related repositories, as described above.

- Related infrastructure
  
  In order to assist the new experimenters in fully grasping the functional and usage details of the facility, any infrastructure offered by Venues and/or technical partners will be available. This could include cloud infrastructure (in case cloud functionality is involved), video cameras (in the cases where streaming is performed), etc.

- Schedule:
  
  - During 2nd month of the project
    
    This phase takes place after the completion of the full review (followed by possible modifications) of the experiment definition.

### 2.1.4. Legal and ethical considerations

- Title:
  
  - Legal and Ethical considerations
    
    Once the technical aspects of the experiment are completely determined (and given that legal and ethical issues have also been discussed in the very first phase of the new partner’s training so that these considerations have been taken into account in all phases previously) it is now time to fine-tune the experiment in terms of these Legal and Ethical considerations. The new partner can now go through every large and small detail of their plan for the experiment together with an advisor on these Legal and Ethical considerations, and any subtle issues can be identified. Any problems in methodology can be corrected by fine tuning the approach to avoid such problems, any potentially tricky situations that could arise can be identified and flagged so the experimenters are weary of them while conducting the experiment, and a final approval in terms of Legal and Ethical considerations can be given.

- Activities:
  
  - Teleconference
    
    This process requires discussion between the two partners involved. There is potentially more or less discussion necessary, but it can all be successfully conducted using one or more teleconferences.

- Partners involved:
K.U. Leuven, as WP 5.1 “Legal, ethical and regulatory framework” leader, will provide the new experimenters with all necessary insight regarding the legal and ethical parameters that ought to be taken into consideration when designing and conducting their experiments.

- Resources:
  - Teleconference
    - This is easy to perform, e.g. using Skype it can be done at no cost.

- Schedule:
  - At least 1 week after detailed technical study has started
    - It is reasonable to expect that training on legal and ethical issues should start after the new partner has come into contact, at least an initial one, with the technical details of the components which will be included in the new experiment.

### 2.2. The “random access” segment

The “random access” segment of the training plan consists of the following phases:

1) Assistance with EXPERIMEDIA documentation
2) Assistance with EXPERIMEDIA software components
3) Familiarity with and understanding of Venues
4) Support for Legal and Ethical matters, Dissemination, etc.

The “random-access” phases are described in the subsections that follow.

#### 2.2.1. Assistance with EXPERIMEDIA documentation

- Title:
  - Assistance with EXPERIMEDIA Documentation

EXPERIMEDIA has produced and is still producing copious amounts of written documentation in the form of numerous and extensive deliverables. The project also maintains extensive internal documentation not released as deliverables, including minutes of past meetings, which include important insights that have been reached and important decisions that have been made, technical “notes” where important technical ideas are sketched in draft form as a “first material” resource that is valuable for further technical work, and, of course, most importantly of all, software documentation. Finally, various items of relevant background material have also been identified. Reading and digesting all of this written material can be a daunting task for a new partner joining the project after it has been running already for a significant
time interval. In this phase, therefore, any support the new partner requires dealing with all this material is provided.

- **Activities:**
  - Schedule a teleconference up to 3 working days in advance
    
    It is expected that any relevant partners can join a teleconference with the new partner within 3 working days of a request for such a teleconference.
  - Support teleconference
    
    At any point, when the new partner has identified that certain documentation is relevant but needs assistance fully processing it, the author(s) of the material will be ready to join a teleconference with the new partner and provide any necessary explanation. We note that this does not involve simply presenting the material to the new partner – the new partner is expected to study the documentation individually. However, any required explanation, clarification, and potentially also dealing with any mistakes that are identified, will be performed.

- **Partners involved:**
  - Authors of documentation involved
    
    Every partner will provide support on any written documentation pertaining to the partner’s software.

- **Resources:**
  - Teleconference
    
    This is easy to perform, e.g. using Skype it can be done at no cost.

### 2.2.2. **Assistance with EXPERIMEDIA software components**

- **Title:**
  - Assistance with EXPERIMEDIA Software Components
    
    EXPERIMEDIA has produced and is still producing a variety of software components. Understanding the function and other properties of all these software components can be a daunting task for a new partner joining the project after it has been running already for a significant time interval. In this phase, therefore, any support the new partner requires dealing with all this material is provided.

- **Activities:**
  - Schedule a teleconference up to 3 working days in advance
It is expected that technical partners can join a teleconference with the new partner within 3 working days of a request for such a teleconference.

- Support teleconference

At any point, when the new partner has identified assistance is needed for the use of a particular software component, the developer(s) of the component will be ready to join a teleconference with the new partner and provide any necessary explanation. We note that this does not involve simply presenting the material to the new partner – the new partner is expected to study and experiment with the software components individually. However, any required explanation, clarification, and potentially also dealing with any mistakes that are identified, will be performed. We note that this process is identified in the context of training, i.e. for the new partner to fully understand the capabilities and properties of the software components – dealing with bugs or even new feature requests is not part of the training plan, and in fact can be dealt with less formally along the lines of the project partners’ already on-going collaboration on developing the EXPERIMEDIA Facility.

- Support workshop

A training workshop including the partners involved in each experiment (experimenters, technical partners of components involved, possibly venues) will take place if necessary to cooperate on software related topics and address integration issues.

- Partners involved:

  - Developers of components involved

    The technical partners responsible for the components and documentation involved will provide any required clarifications, directions and support regarding software and integration issue during both teleconferences and workshops.

- Resources:

  - Teleconference

    This is easy to perform, e.g. using Skype it can be done at no cost.

  - Access to repositories

    Full access to all related EXPERIMEDIA documentation and software components is required.

  - Software documentation

    Extensive documentation is available in the repositories (see D2.2.1 “EXPERIMEDIA Baseline Components” and D2.3.3 “First Major Software Release”).

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o (possibly, for real-time testing) Related infrastructure

Depending on the nature of the problem encountered by the new partner in understanding/using/modifying a component to adapt it to suit their particular needs/requirements, related infrastructure from Venues and/or technical partners may be required and will be readily available.

2.2.3. Familiarity with and understanding of venues

• Title:

  o Familiarity with and understanding of Venues

  The Venues have many subtle issues that need to be understood by any experimenter. These involve both permanent features, e.g. exactly understanding the expected profiles and interests of the users who will participate in experiments, and time-dependent features, e.g. finding out about the schedule of activities at the Venue, which may influence the possible scheduling of the experiment. The Venue will therefore be available at any time for providing information and clarification to the new partner.

• Activities:

  o Schedule a teleconference up to 3 working days in advance

    It is expected that Venues can join a teleconference with the new partner within 3 working days of a request for such a teleconference.

  o Support teleconference

    At any point, when the new partner has identified assistance is needed for the understanding of a Venue, a representative from the Venue will be ready to join a teleconference with the new partner and provide any necessary explanation and clarification, so as to help the new partner fully understand the capabilities and particularities of the Venue.

    OR

  o Schedule a meeting up to 6 working days in advance

    If it is estimated that a teleconference does not suffice to clarify the new partner’s questions, a meeting at the venue should be scheduled.

  o Meeting at Venue

    Visiting the venue and clarifying all arising issues on the spot will significantly help the new partner in familiarising themselves with all aspects that pertain to the Venue hosting their experiment.
• Partners involved:
  o Related Venue

  Representatives from the related Venue will be at the experimenter’s disposal for support teleconferences or meetings.

• Resources:
  o (possibly) Teleconference

  This is easy to perform, e.g. using Skype it can be done at no cost.

  o (possibly, for real-time testing) Related infrastructure

  Related infrastructure depending on the experiment and Venue will possibly be required (e.g. video cameras, cloud infrastructure, etc.).

2.2.4. Support for legal and ethical matters, dissemination, etc.

• Title:
  o Support for Legal and Ethical matters, Dissemination, etc.

  Legal and Ethical matters are likely to crop up at various points in the process of the new partner’s understanding how their experiment will function within EXPERIMEDIA. Although Legal and Ethical issues are considered at the very beginning of training and are focused on at the very end of training also so as to fine tune the experiment to fully comply to all Legal and Ethical concerns, the new partner may require additional assistance in between these end points if any uncertainty arises. Dissemination is usually easily understood by partners with previous experience of European projects, however, especially a partner new to this community may require additional support.

• Activities:
  o Schedule a teleconference up to 3 working days in advance

    It is expected that Activity 5 partners can join a teleconference with the new partner within 3 working days of a request for such a teleconference.

  o Support teleconference

    Whenever the new partner judges that additional support is required regarding the ethical and legal aspects pertaining to their experiment or even dissemination matters, the responsible partner will be ready to join a teleconference with the new partner and provide any necessary explanation or insight.

• Partners involved:
• K. U. Leuven or other Activity 5 partners

K. U. Leuven (for legal and ethical issues) or the responsible Activity 5 partner will be ready to provide any necessary explanation or assistance to the new experimenter to help them address any ethical, legal, or dissemination related issues.

• Resources:

  o Teleconference

     This is easy to perform, e.g. using Skype it can be done at no cost.
3. Content of the training

Section 2 provides a complete training plan for ensuring new partners joining the EXPERIMEDIA consortium are fully ready and able to successfully complete their work. Section 2 concentrates on the steps more than the content of the training plan, however. Here, we provide a “syllabus” for the training, which can function as a check list to be considered in each phases of the training plan. Further detail on what will be done related to each item of the list below for each particular new partner going through this training plan depends on the details of each particular experiment to be conducted by each particular new partner, therefore, further detail need not be included here, but should be determined for each particular new partner.

- Software Components
  - Functional characteristics
  - Non-Functional characteristics
  - Access to the components (shared project repositories, etc.)
  - Collaboration process (for receiving updates, reporting bugs, requesting new features etc.)

- Project Documentation
  - Familiarity with all relevant documentation
    - Deliverables
    - Past discussions of the consortium recorded in meeting minutes
    - Tech notes
    - Software documentation
    - Background material
  - The process of authoring new documentation, to which the new partner will now also contribute

- Methodology and constraints
  - Experimental process
  - Methodological choices specific to EXPERIMEDIA
  - Facility requirements and constraints
  - Legal and ethical considerations
  - Formal requirements according to the project’s Description of Work

- “Soft knowledge”
  - Sharing of other partners’ understanding and intuition about EXPERIMEDIA with the new partner
  - Understanding the human side of how work flows in this particular project
4. Conclusion and discussion

This document has presented the steps to be followed for the training of the new partners joining the project as a result of the first open call. The training plan comprises eight phases in total: four taking place sequentially and another four occurring at any time when required. The aim is to provide a complete training plan for ensuring new partners joining the EXPERIMEDIA consortium are fully ready and able to successfully complete their work, both in terms of the workflow and objectives of this training plan (Section 2) and in terms of the content of the training (Section 3). Concluding, we hereby deal with any additional / miscellaneous points and pointers that should be mentioned but did not fit in the above structure of this document.

- It will be efficient to have the face to face meeting for new partners whose experiment addresses the same venue at the same time.
- Some of these meetings might also be held together with a GA of the entire project, making use of partners’ travel budget even more efficient.
- We should point out that this training plan is a generic plan, so of course it should be adapted to each particular new partner in detail.
- There may be technical differences in how resources are provided to partners being trained, e.g. open source software components will be shared with them in a different way compared to closed source software components.
- The deeper aspects of the EXPERIMEDIA “Vision” need to be stressed: the Future Media Internet, the scenarios such as Live and Augmented, the experimental nature of the project that differentiates it from many application-development European projects.