D4.4

TranS4MErs Platform and Application

TranS4MErs

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Author(s)	Organisation
Elena Avatangelou (platform design, document authoring)	Netcompany Intrasoft
Notis Pikros, Michalis Sotiropoulos, George Gkikas (technical development)	Netcompany Intrasoft
Contributors	**Organisation**
Antonio Damasceno (platform design)	F6S
Hanna Kim (platform design)	Improve
Becky Garrard, Lise-Ann Sheahan, Tamara Wierks (platform design) Denise Thomas (wireframes)	IMR
Erika Krisztian, Gloria Bevilacqua (graphic design)	EuropaMedia
Teodora Georgieva, Daniela Georgieva, Konstantin Uzunov (platform design)	ARCC

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Acronyms and Abbreviations

Acronym	Definition
ADMA	Advanced Manufacturing
DoA	Description of Action
KPI	Key Performance Indicator
QM	Quality Mark
SME	Small and Medium Enterprise
TP	Transformation Plan
WP	Work Package

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1. Executive Summary

Deliverable D4.4 "TranS4MErs platform and application", aka the ADMA xChange platform, is a web application that enables the collaboration among SMEs, TranS4MErs, large enterprises and business support organisations within the digital transformation process. It acts as a repository for the knowledge super-grid, responsible for connecting users to training and educational material and for facilitating the collaboration among users (TranS4MErs, SMEs, service providers and programme managers).

The present document accompanies the web application, presenting the xChange platform development methodology, the key user roles and their respective journeys, and an overview of all services provided by the platform with indicative screenshots.

The xChange platform is accessible to registered users only and it is available at https://trans4mersxchange.eu/.

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2. Introduction

2.1 ADMA TranS4MErs in Short

ADMA TranS4MErs is re-energizing the European Advanced Manufacturing (ADMA) Support Centre project's efforts to help SMEs' transformation towards next-generation factories. The €5.6M project, funded by the Horizon 2020 Research and Innovation Framework Programme of the European Union, coordinated by Irish Manufacturing Research (IMR), brings pan-European multi-partner cooperation (38 partners from the 27 EU member states) to support ambitious SMEs on their digital transformation journey. ADMA TranS4MErs will build and deliver assistance with digital competencies and training in advanced skills in digital technologies in SMEs. With the help of the knowledge super-grid infrastructure and the selected cohort of SME advisors, the TranS4MErs, we will assist the transformation of 1000 SMEs into Factories of the Future by 2024.

2.2 Scope of the Document

Deliverable D4.4 "TranS4MErs platform and application" has been developed within the frames of Task 4.3: TranS4MErs platform/toolbox and application. D4.4 is a Demonstrator deliverable, i.e. a software application. Hence, the present document has the goal to provide an overview of the actual application, along with information on accessing it.

More specifically, D4.4 is the ADMA xChange platform that enables the collaboration among SMEs, TranS4MErs, large enterprises and business support organisations within the digital transformation process. It is a web application, also optimised for use on mobile devices, that acts as a repository for the knowledge super-grid, responsible for connecting users to training and educational material and for facilitating the collaboration among users (TranS4MErs, SMEs, service providers and programme managers).

The xChange platform is accessible to registered users only and it is available at https://trans4mersxchange.eu/.

The document presents the xChange platform development methodology, the key user roles and their respective journeys, and an overview of all services provided by the platform with indicative screenshots.

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3. Introducing the ADMA TranS4MErs xChange Platform

3.1 Platform Definition and Initial Requirements

The ADMA TranS4MErs xChange platform is the central tool used within the ADMA TranS4MErs project to enable the digital transformation process of SMEs across Europe. It is a collaboration space for SMEs, TranS4MErs and service providers, through which these stakeholders can establish collaborations, receive training, work collaboratively on the SMEs transformation process, find and purchase services. The high quality of all services provided is ensured by (a) the registration requirement to use the platform, (b) the use of Quality Marks for all actors providing services to SMEs, and (c) the evaluation of those actors upon service delivery.

In addition, the platform provides useful information to the ADMA TranS4MErs programme managers, enabling them to monitor the programme's progress, to review usage statistics, and to identify the "champions" of the transformation process.

The xChange platform requirements were initially discussed during a Design Thinking workshop that took place within T1.4 and were presented in D1.4. The platform's design process however was a more time and resource demanding task, as the detailed requirements of each stakeholder involved, matured along with the project progress and the definition of the various methodologies and processes to be supported by the platform, as presented later in this document.

3.2 Project Definitions

In this section, key terms related to xChange platform are presented in short. For more details on each term, please refer to the respective documents.

ADMA TranS4MEr: the person who assists a SME on its transformation journey. He/she is a trained key person that understands the specific challenges and appropriate tools for the SME transformation and acts as a helping hand/trusted advisor. (D1.1, D1.2)

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Service provider: a person or company offering training and expertise to support the technology implementation, also expressed as the catalogue of tools and services. (D1.1, D3.1)

Quality Mark: it is a mark of recognition for TranS4MErs, services and tools. It is awarded by the ADMA programme managers to ensure the high quality of all services provided to the SMEs. (D1.1, D1.2)

Vouchers: they are used to finance the transformation planning phase for SMEs, and for many also the first implementation actions. The voucher system will provide the SME with 'funds' to pay for the chosen education module, tech tool, expert advice etc. (D1.1, D4.1)

ADMA scan: a questionnaire that uncovers strengths and weaknesses in 7 areas related to advanced manufacturing (D1.1)

3.3 Accessing the Platform

The xChange platform is available to registered users only at:

https://trans4mersxchange.eu

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4. Development Methodology

4.1 Development Phases

For the delivery of the xChange platform the standard Software Development Life Cycle (SDLC) methodology was followed, including the steps presented in the Figure 1. The process was repeated for each user role that is supported by the platform (i.e. the TranS4MEr, the SME, the Service Provider and the Programme Manager) in four main iterations. The re-design of the functionality or structure of a page was needed in several cases based on the feedback received from the partners during the development process, in order to achieve the best possible result for the platform users. The phases of the SDLC followed within the ADMA TranS4MErs project include the following activities:

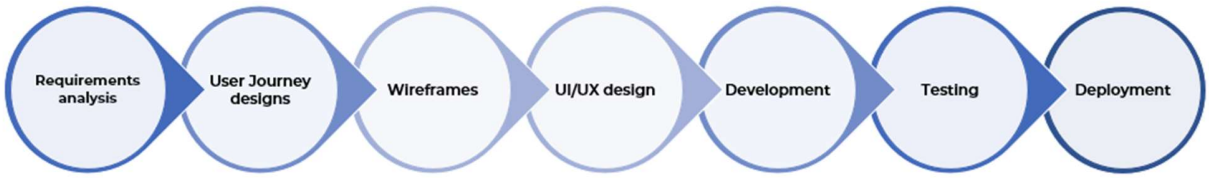

Figure 1: The xChange platform development methodology

Requirements Analysis

The ADMA TranS4MErs user requirements elicitation was based on the principles of Design Thinking for user-centred design. A co-design and requirements workshop was organised to this end, involving key consortium partners, during which the role and key functionality of the ADMA TranS4MErs platform was analysed. A comprehensive list of ideas on the services to be provided to the key platform stakeholders (i.e. the SME, the TranS4MEr and the Service Provider) was developed, leading to the final list of the ADMA TranS4MErs platform requirements. For a detailed description of the requirements analysis, please see Deliverable D1.4.

User Journey Designs

Based on the initial user requirements list, the user journeys of all platform users were designed in detail using MURAL. Interactions both among user roles and with external platforms were identified and presented in a diagram as shown in Figure 2.

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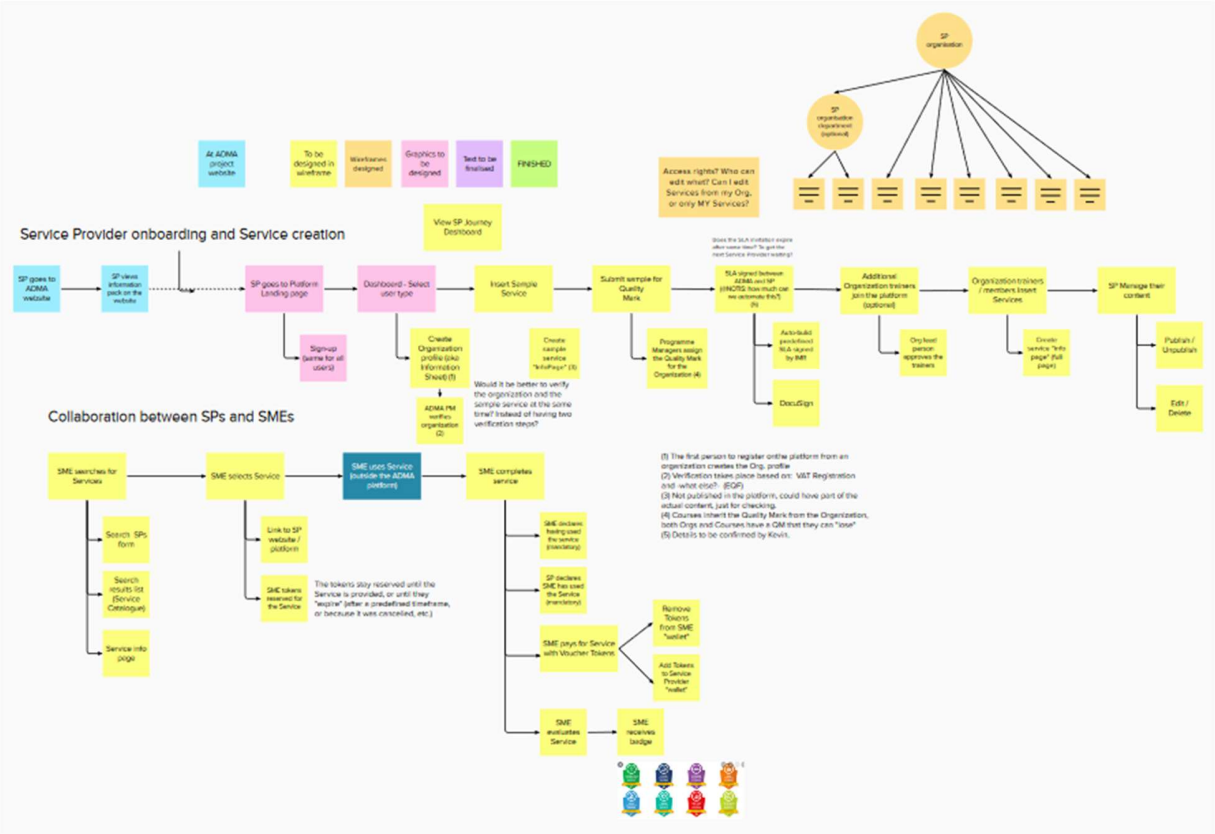

Figure 2: Using MURAL to design the xChange platform services

Wireframes

Following, each step in the user journeys was depicted in the form of wireframes, defining the structure of the xChange platform pages and optimizing the use of screen space.

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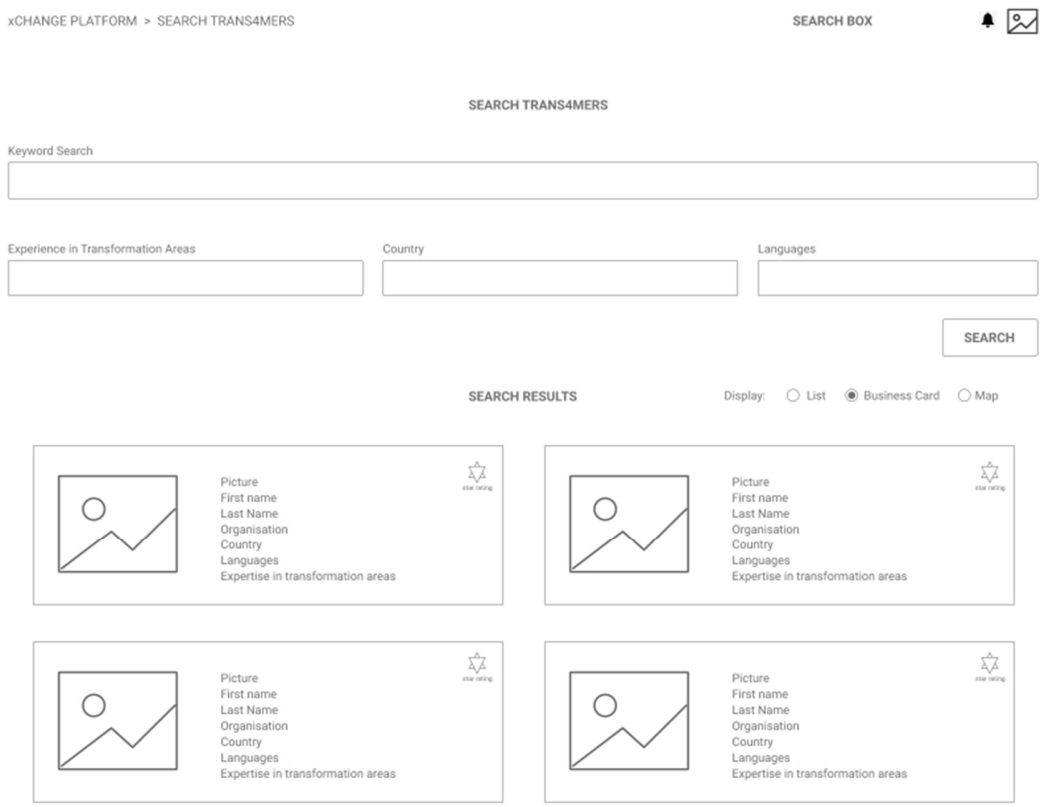

Figure 3: Wireframing the xChange platform

UI/UX Design

In the next step the UI/UX for each wireframe was designed by the project's creative team, establishing the look and feel of the xChange platform.

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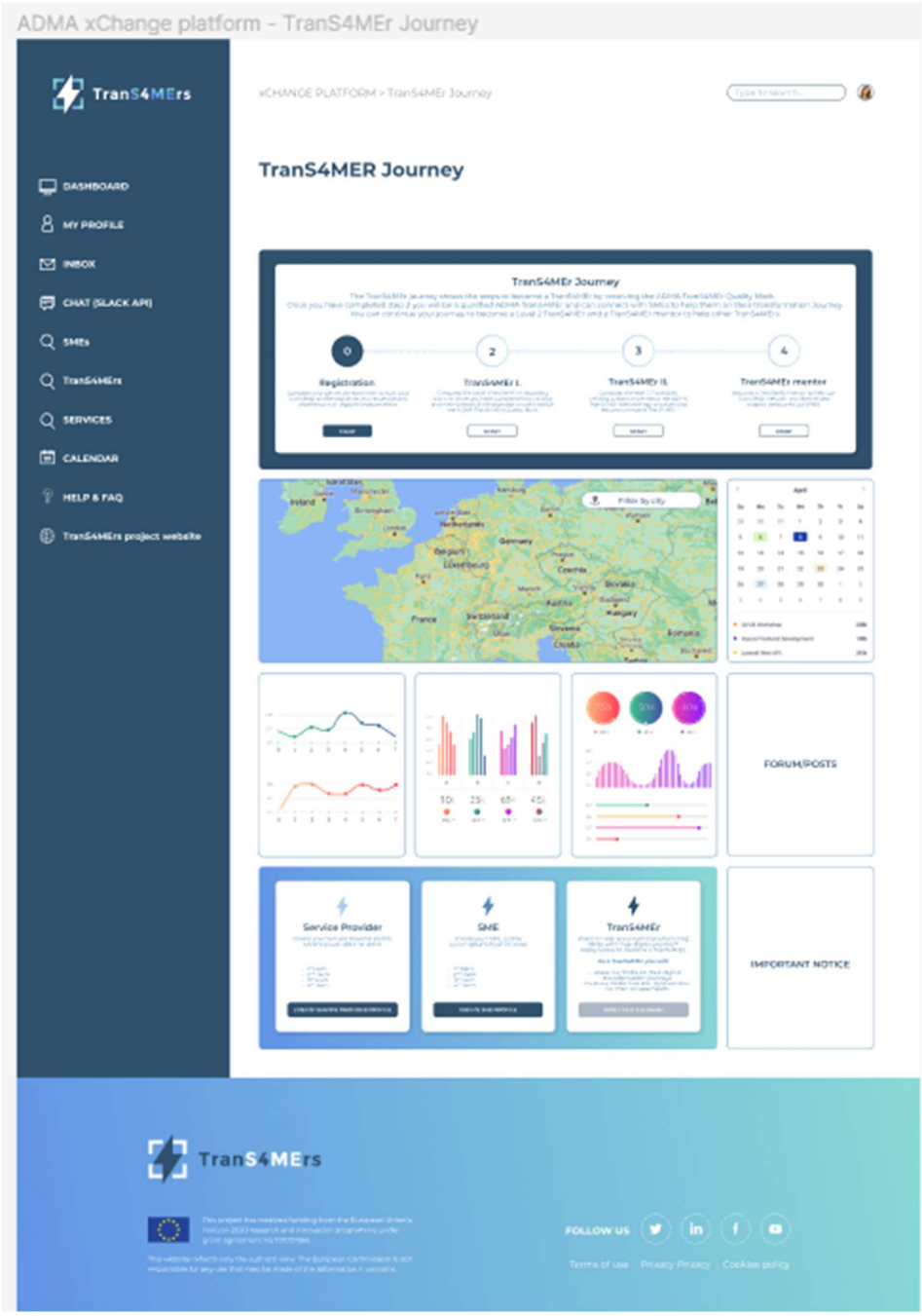

Figure 4: Sample of xChange UI design

Development

The agile project management methodology was adopted for the technical development of the project. The work was divided into modules and the actual coding started. This phase was completed in the development environment of the xChange platform, without affecting the performance and the functionalities of the live portal

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that is hosted in the production environment. The schedule consisted of short daily meetings to align the development effort and weekly review meetings, during which expert partners were involved to provide feedback and clarifications on open questions of the development team.

Testing

The ADMA TranS4MErs project team was involved in the platform's internal testing process. The goal was not only to identify bugs, but also to provide feedback regarding the usability and intuitiveness of the platform. The text descriptions were also improved during the final testing phase of the development process.

Deployment

The xChange platform is a responsive web application that is available through any browser at: https://trans4mersxchange.eu.

4.2 Development Timeline

After the Platform Requirements Elicitation in M4 of the project (D1.4) a development timeplan was prepared for the development and delivery of the xChange platform. Prioritization in the development of each platform module depended on the correlated project activities.

The formal delivery of the platform was on M13 of the project (initially M12). However, following the learning loops concept of the ADMA TranS4MErs methodology, it is foreseen that the development process will continue beyond M13 to enable platform improvement based on the feedback received by the actual users during the first months of operation. A redesign of the graphic design is also in progress, to improve the look and feel of the platform based on comments received during the last phases of user testing.

4.3 Technologies Used

The ADMA TranS4MErs xChange platform was built using Drupal. Drupal provides its users with the tools they need to make their own content management solution, while still providing some pre-built components to help them get started. Thus, it can be described both as a content management system (CMS) and a content management framework (CMF) – one system that strives to have the strengths of both, without their deficiencies. Drupal is free and open source, it is written in PHP and is distributed under the GNU General Public License.

Drupal is a modular system. Its functionality is held in modules that integrate into the main workflow at various points, altering the way other parts operate or even adding

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new features entirely. In order to build a fully functional website, we use modules that either come as part of the standard Drupal download (the core) or are provided by the various developers of the Drupal community.

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5. User Roles and Journeys

5.1 Overview

The xChange platform supports four types of users, each playing a significant role in the Transformation process of SMEs. Each user role has their own user journey and specific services provided by the platform that they are allowed to access and use. The user roles are:

- TranS4MEr
- SME
- Service Provider
- Programme Manager

5.2 TranS4MEr

The ADMA TranS4MEr is the person who assists an SME on its transformation journey. He/she is a trained key person that understands the specific challenges and appropriate tools for the SME transformation and acts as a helping hand/trusted advisor- that guides the SME throughout the journey.

The TranS4MEr advances through the platform by receiving the ADMA TranS4MEr Quality Mark and "unlocking" available services after each step. Their journey includes four steps:

1. Create a detailed profile, demonstrating their experience in consulting SMEs through digital transformation projects.
2. Complete the TranS4MEr I Training to receive the Quality Mark and connect with SMEs to help them on their transformation journey (as is presented in the SME journey).
3. Continue their training to be become a Level 2 TranS4MEr (Expert).
4. Become a TranS4MEr mentor to help other TranS4MErs provide the best support possible to SMEs.

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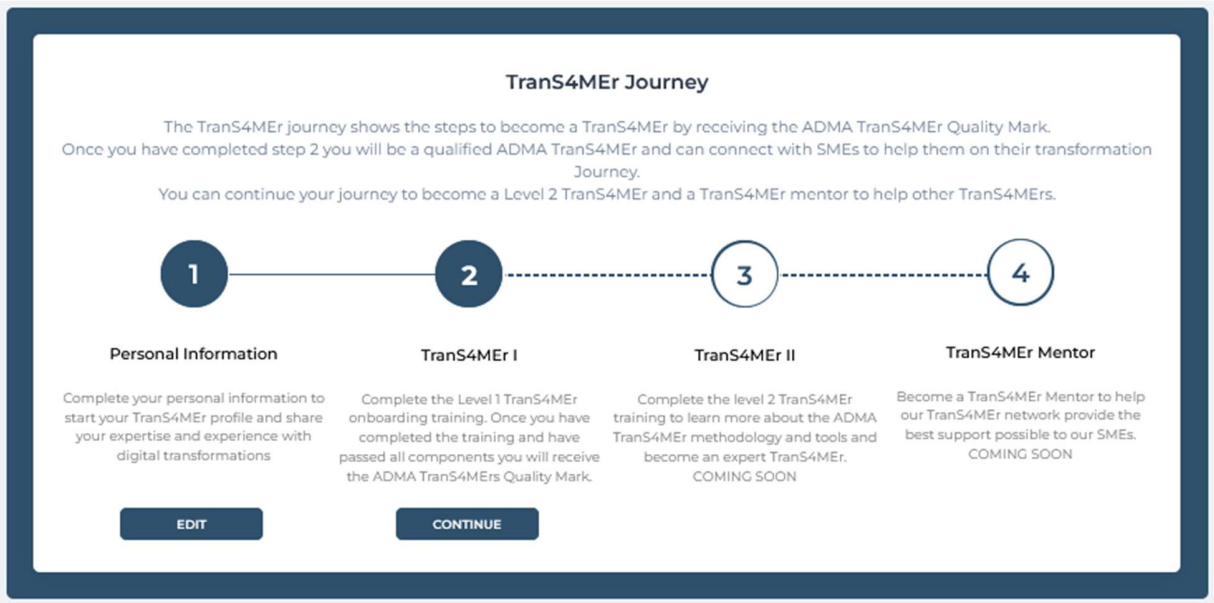

Figure 5: The TranS4MEr onboarding journey

5.3 SME

The key stakeholder at the centre of attention is the SME, which is to be supported on its transformation journey.

SMEs acquire access to the full platform functionality once they have been awarded with the Design Voucher. They can then begin their transformation journey, which comprises of the following steps:

1. Search for and match with a TranS4MEr.
2. Take the SME scan to evaluate their current digital readiness status.
3. Collaborate with the TranS4MEr in developing the Transformation and Implementation Plan, including a selection of KPIs to monitor throughout the process.
4. Select a set of Services to be implemented during the implementation period.
5. Submit their Transformation and Implementation Plan for evaluation.

SMEs that receive the Implementation Voucher can then initiate the second phase, which includes:

6. Implementing the selected services towards becoming a Factory of the Future.
7. Completing the transformation journey and evaluating the entire process.

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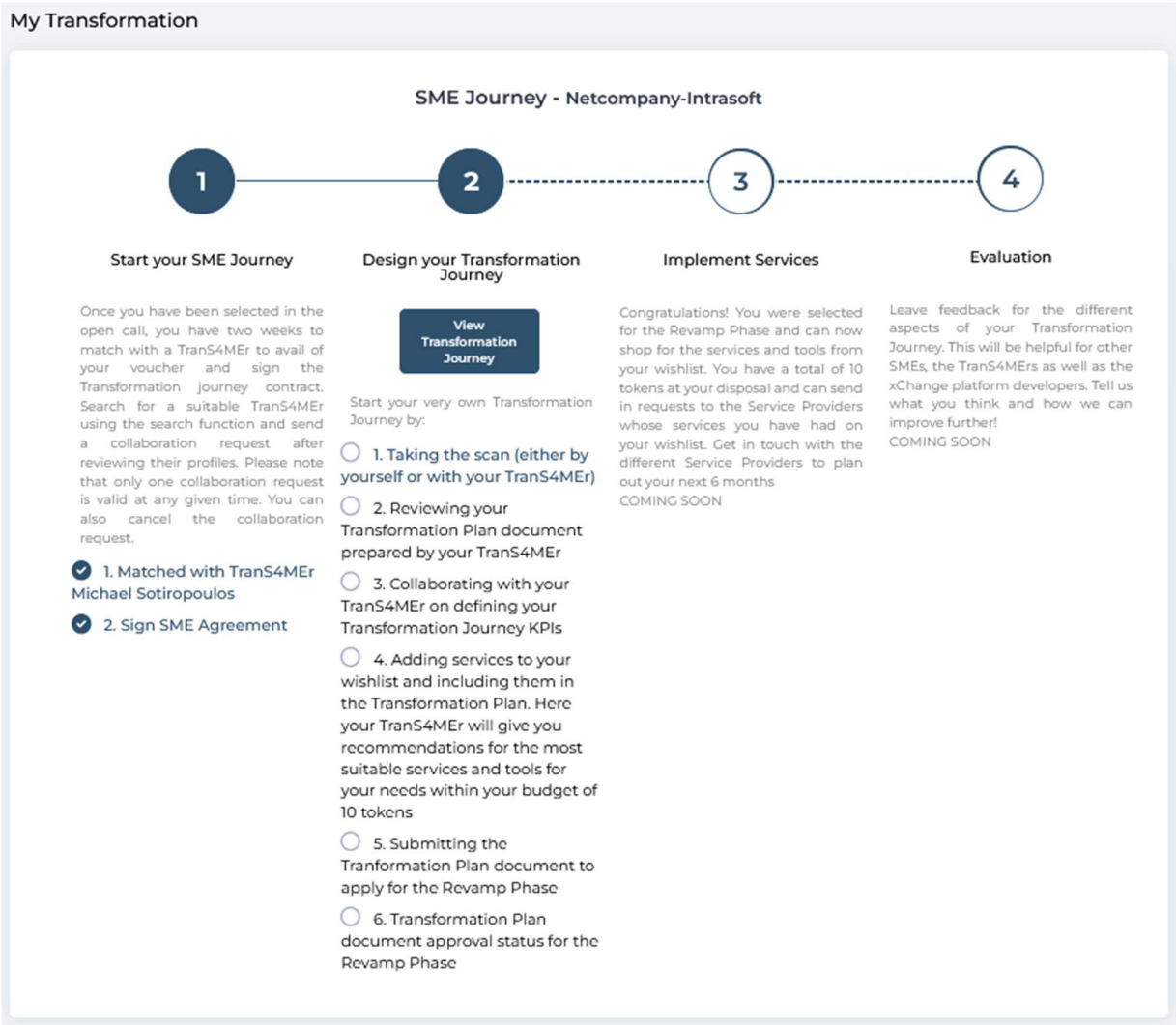

Figure 6: The SME transformation journey

A journey is also available for SMEs who do not wish to apply for the vouchers where they can take the scan and browse the service catalogue to find services they would like to implement by contacting the Service Provider directly.

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5.4 Service Provider

Service Providers offer training and expertise (aka the catalogue of tools and services) to support the implementation of the SMEs transformation journey.

Service Providers need to receive the ADMA TranS4MErs Quality Mark before being able to offer their service through the xChange platform. Their journey includes the following steps:

1. Create a detailed company profile.
2. Share a sample service to demonstrate the type, style, and quality of their work.
3. Based on their profile and sample service, receive the Quality Mark, which enables them to add their services to the xChange platform service catalogue for SMEs.
4. Sign the Terms and Conditions.

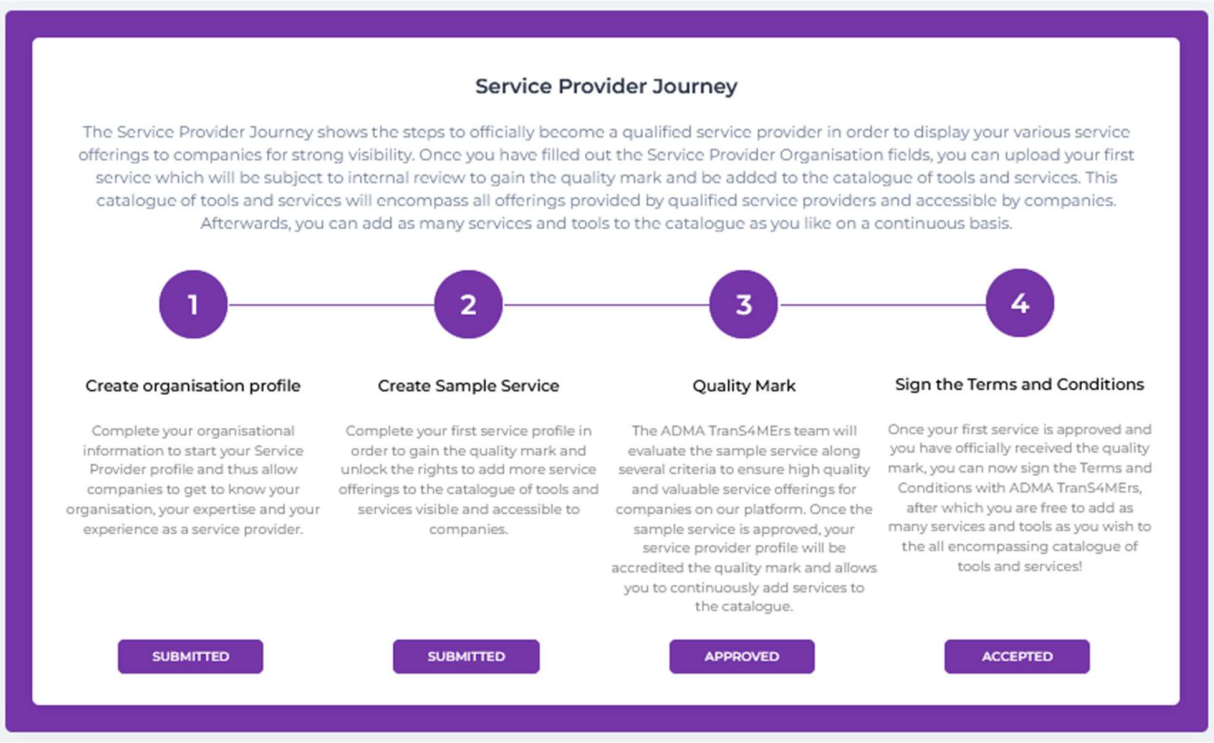

Figure 7: The Service Provider onboarding journey

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5.5 Programme Manager

Programme Managers are members of the ADMA TranS4MErs team, responsible for supporting, monitoring and facilitating the overall operation and use of the ADMA TranS4MErs xChange platform. The responsibility of Programme Management (PRM) is not only to develop and assure the coherence of the ADMA TranS4MEr program, but also to ensure that the affiliated partners share the vision, understand the processes, and are engaged in attracting SMEs and other stakeholders.

Programme Managers have access to the following services through the xChange platform:

- User management, e.g. awarding and managing Quality Marks
- Monitoring SME progress and KPIs
- Monitoring services and revamp voucher usage and spending
- Monitoring platform usage statistics
- Monitoring evaluation of the overall platform, TranS4MErs and services
- Leaderboards, awards and competitions
- Content management

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6. Platform Services

6.1 Services Overview

The xChange platform provides a number of services to the platform users to enable the overall process of SMEs' digital transformation. The following table is an overview of those services and the user roles that have access to each service.

	TranS4MEr	Service Provider	SME
Registration and login	X	X	X
Edit user account	X	X	X
Dashboard	X	X	X
Choose user role widget	X	X	X
Search Services	X	X	X
Search TranS4MErs			X
Search SMEs	X		
My Transformations	X		X
TranS4MEr Journey Widget	X		
My TranS4MEr profile	X		
TranS4MEr I training	X		
My TranS4MEr Requests	X		
Create SME Profile			X
My SME profile			X
Transformation Journey Portfolio	X		X
My SME Requests			X
Service Provider Journey Widget		X	
My Service Provider Profile		X	
Add Service		X	
FAQ	X	X	X
TranS4MErs Project Website	X	X	X

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6.2 Functionality Common to all Users

6.2.1 Registration and Login

The first action performed by all users upon accessing the platform is registration and login. Registration is based on the user's email address, which is validated by sending an initial email with a unique access code, before allowing them to continue on the platform.

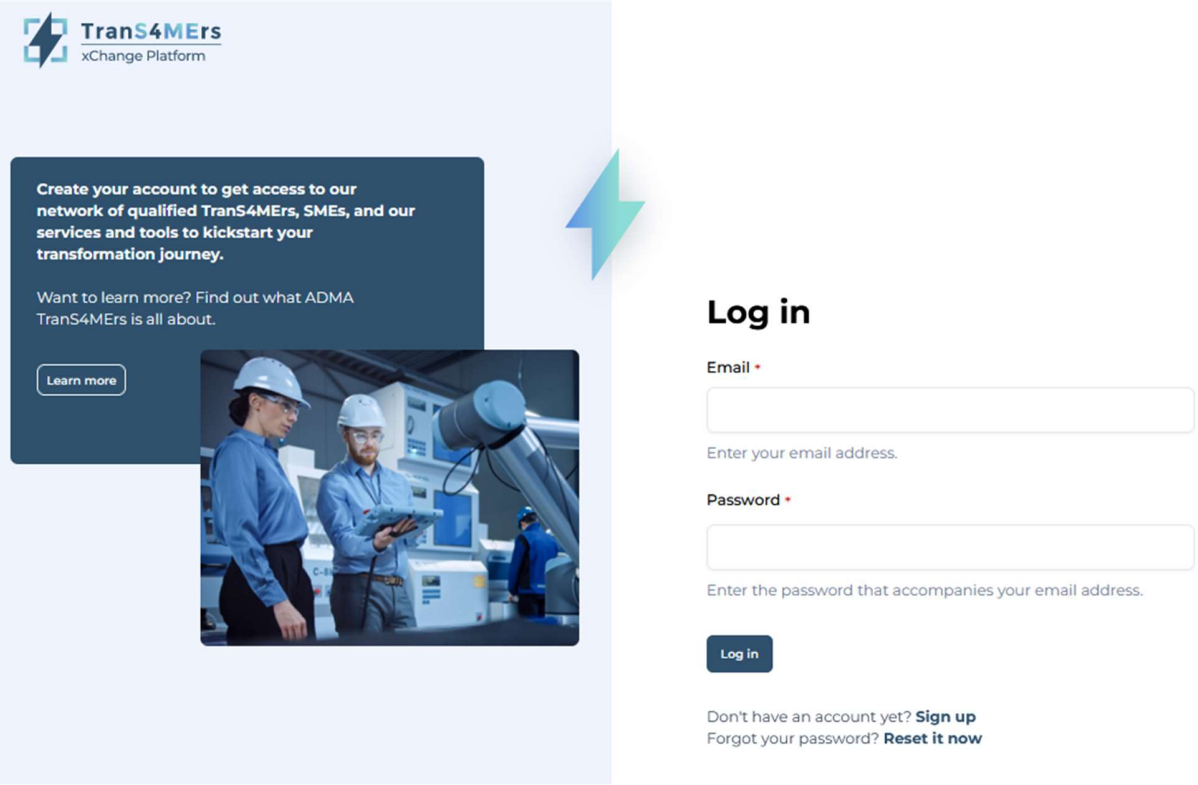

Figure 8: cChange platform login screen

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6.2.2 Edit User Account

All users can edit their account information, which includes:

- First and last name
- Email
- Password
- Timezone
- Picture

The “My Account” service is accessible via the icon on the top right corner.

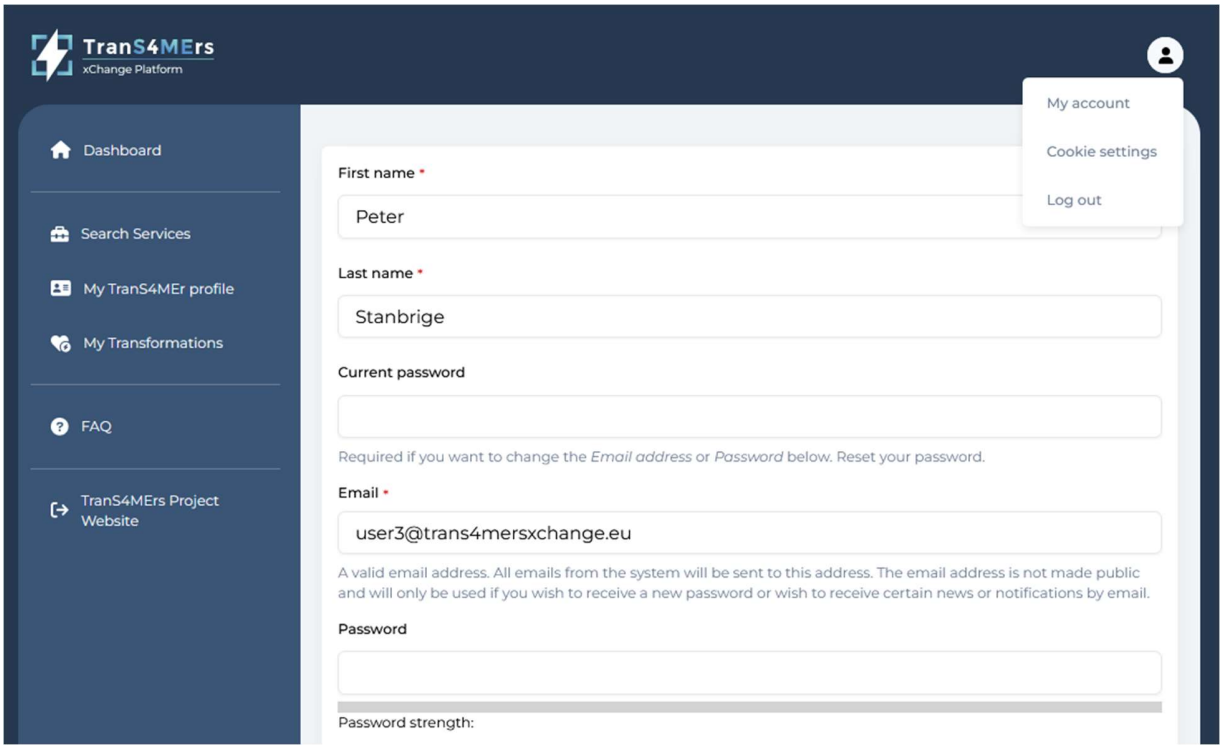

Figure 9: Editing the user account

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6.2.3 Dashboard

The Dashboard is the first platform section users see upon entering. It includes widgets of all functionalities available to the user based on their profile and their progress along the Transformation Journey. The Dashboard is accessible via the left menu.

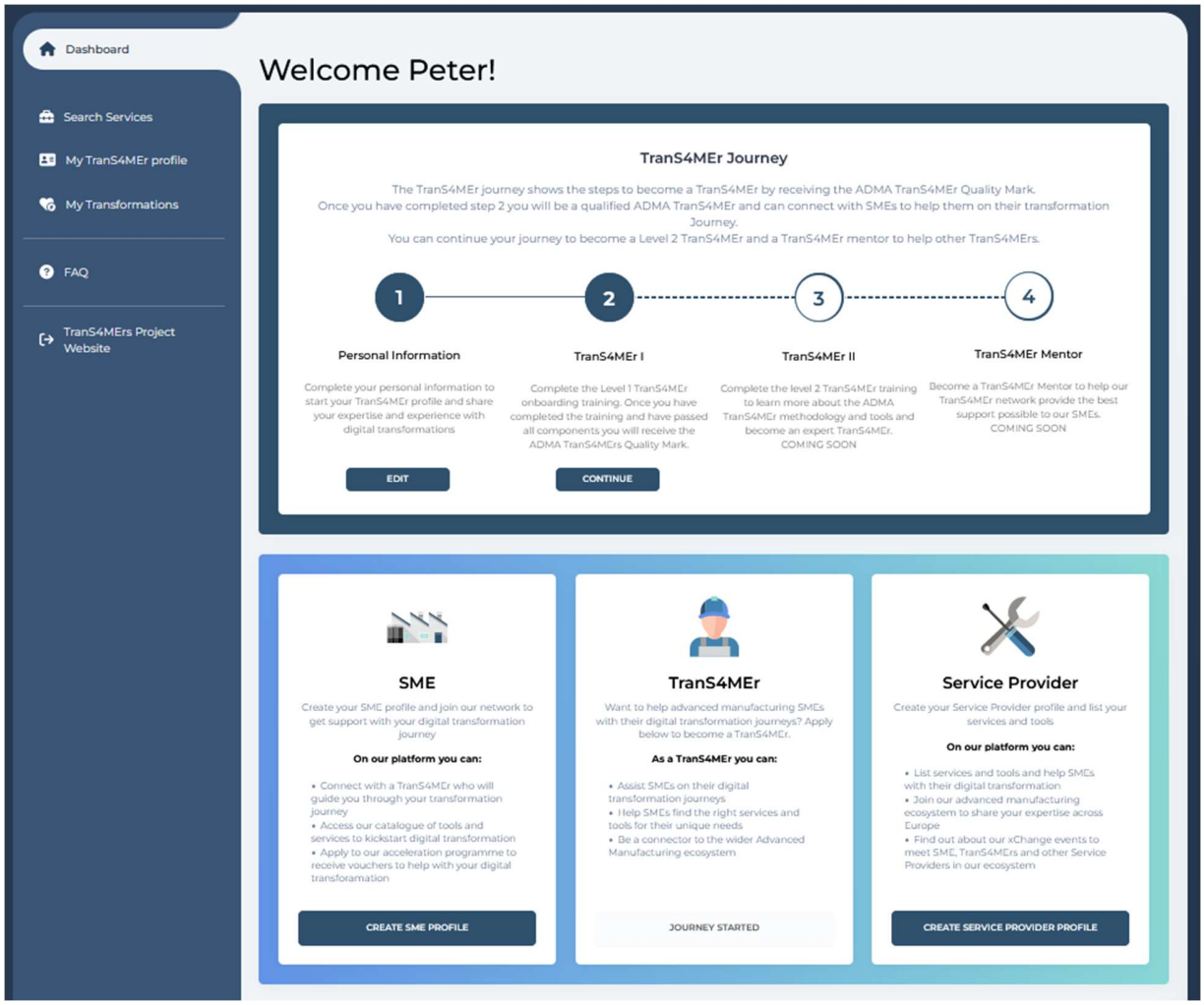

Figure 10: The user dashboard

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6.2.4 Choose User Role Widget

After registering on the platform users select the type of profile / role they wish to create. Their options are:

- SME
- TranS4MEr
- Service Provider

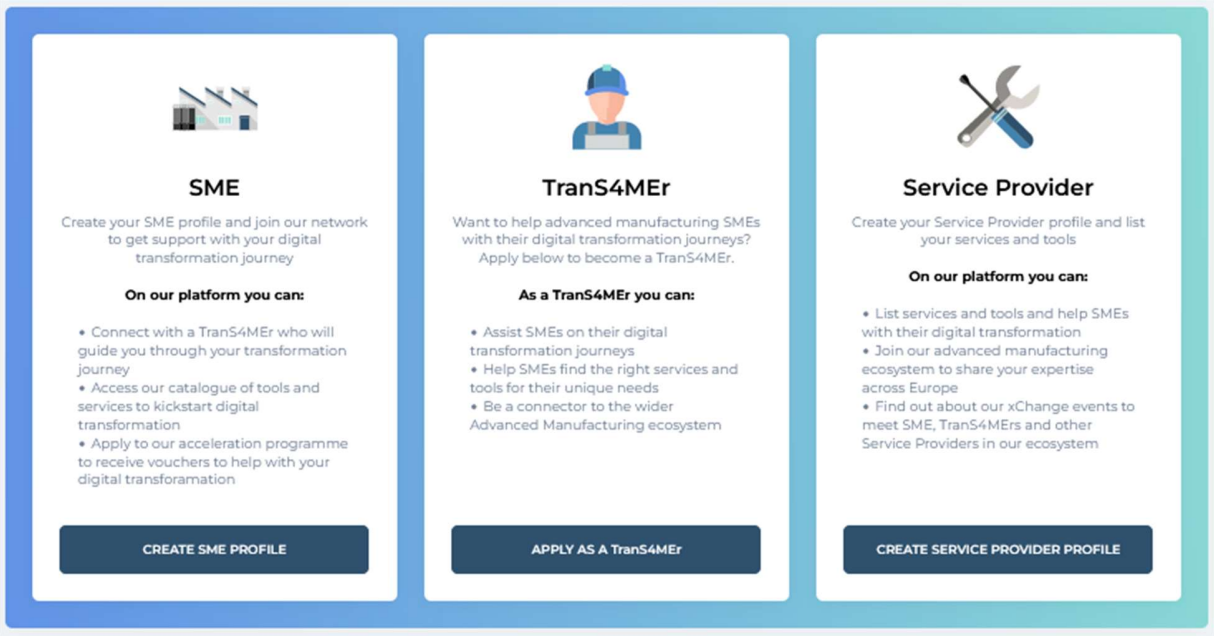

Figure 11: Widget for selecting user role

6.2.5 Search Services

Users can search for services available in the Catalogue based on numerous criteria, such as keyword, organisation, application area, language, country. Results are presented in the form of business cards. Users can then select a service to view all details, bookmark it, or add it to an Transformation and Implementation Plan (for TranS4MErs only).

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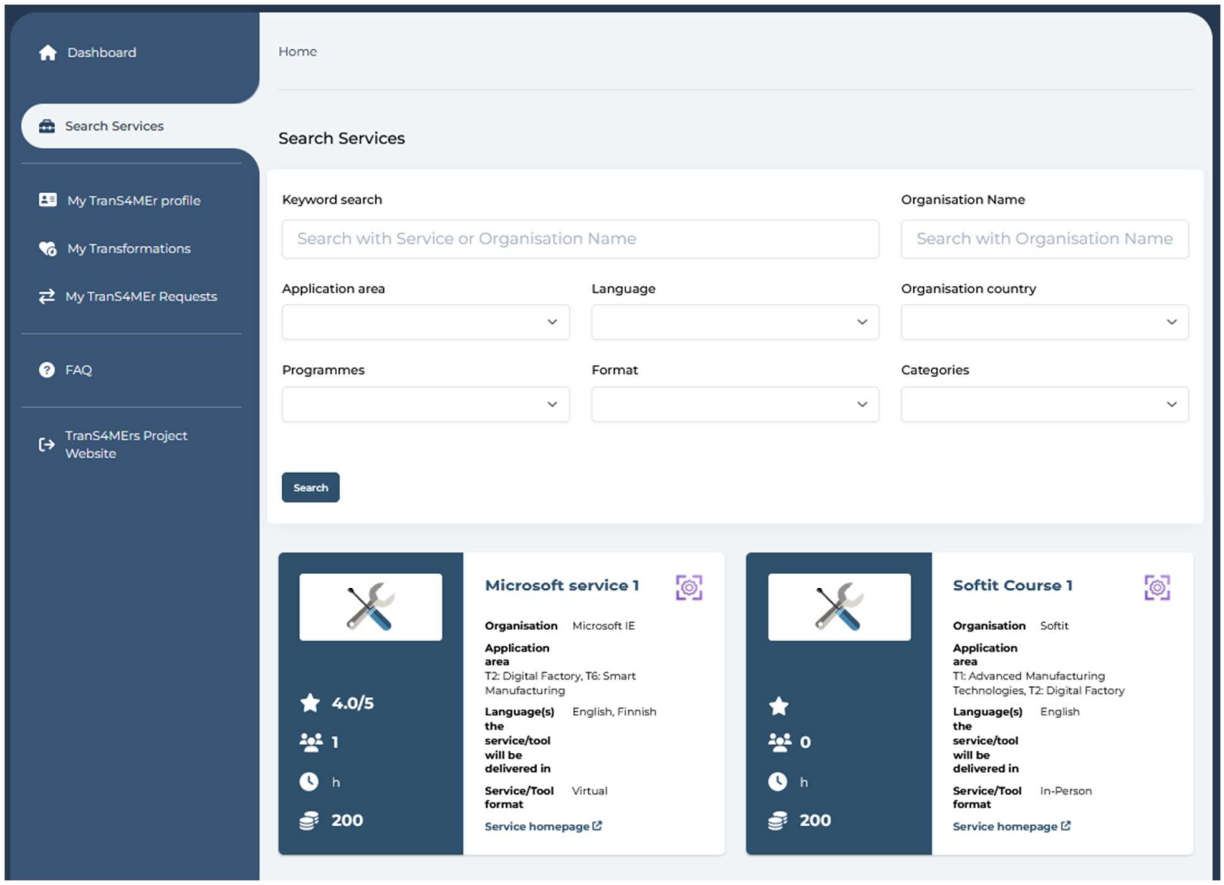

Figure 12: Searching for services

6.2.6 FAQ

At the FAQ section, users can find information about the key ADMA TranS4MErs concepts, terminology, processes, etc.

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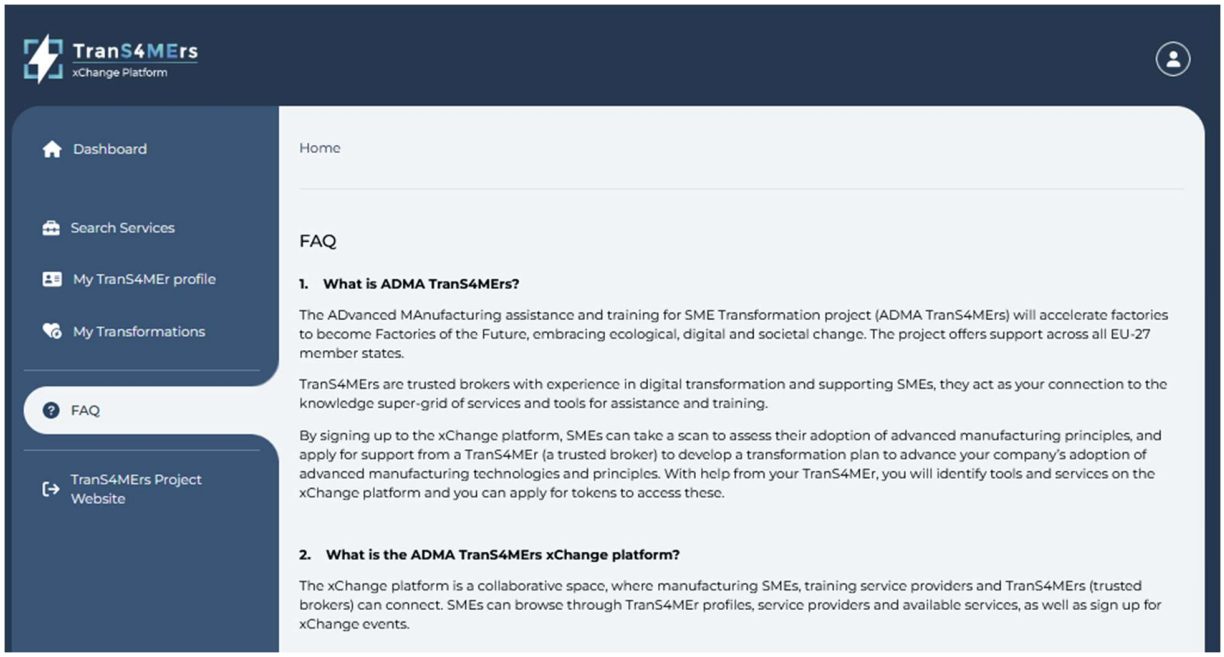

Figure 13: The FAQ section

6.3 TranS4MEr Functionality

6.3.1 My TranS4MEr Profile

The TranS4MEr's profile includes comprehensive information to enable TranS4Mers to demonstrate their expertise in consulting SMEs and facilitate them in establishing collaborations with SMEs through the platform. TranS4MErs can choose which sections of their profile will be publicly available using toggle buttons. They can also declare their availability for collaboration with SMEs.

The profile information comprises of:

- Organisation title
- Contact information (Address, phone number)
- Social media links
- Short descriptions related to their expertise (headline, bio, educational background)
- Spoken languages

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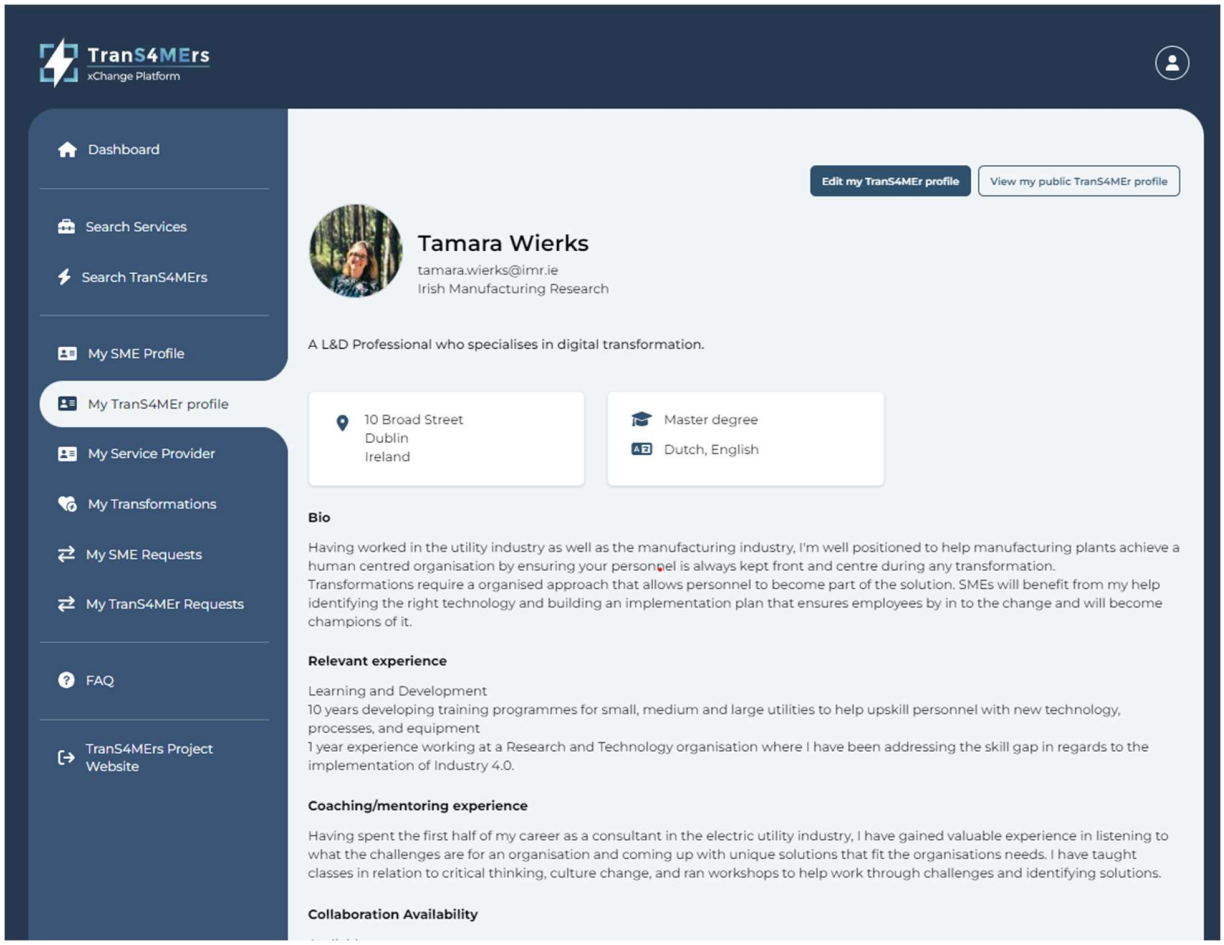

Figure 14: The TranS4MEr profile

6.3.2 TranS4MEr Journey Widget

The TranS4MEr journey widget guides TranS4MErs through the process of receiving a Quality Mark, and thus being able to act as a TranS4MEr on the platform.

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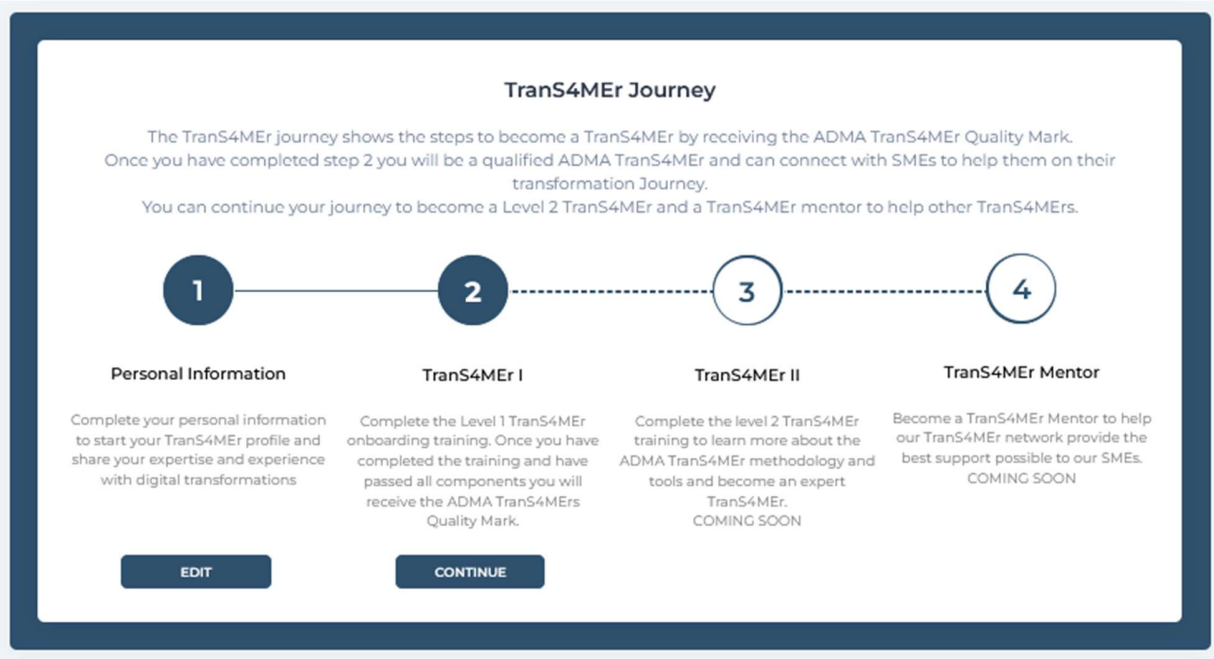

Figure 15: The TranS4MEr journey

6.3.3 TranS4MEr I Training

TranS4MEr Level I training comprises of a series of lessons, quizzes and a webinar that users who aspire to become TranS4MErs need to complete to acquire the Quality Mark.

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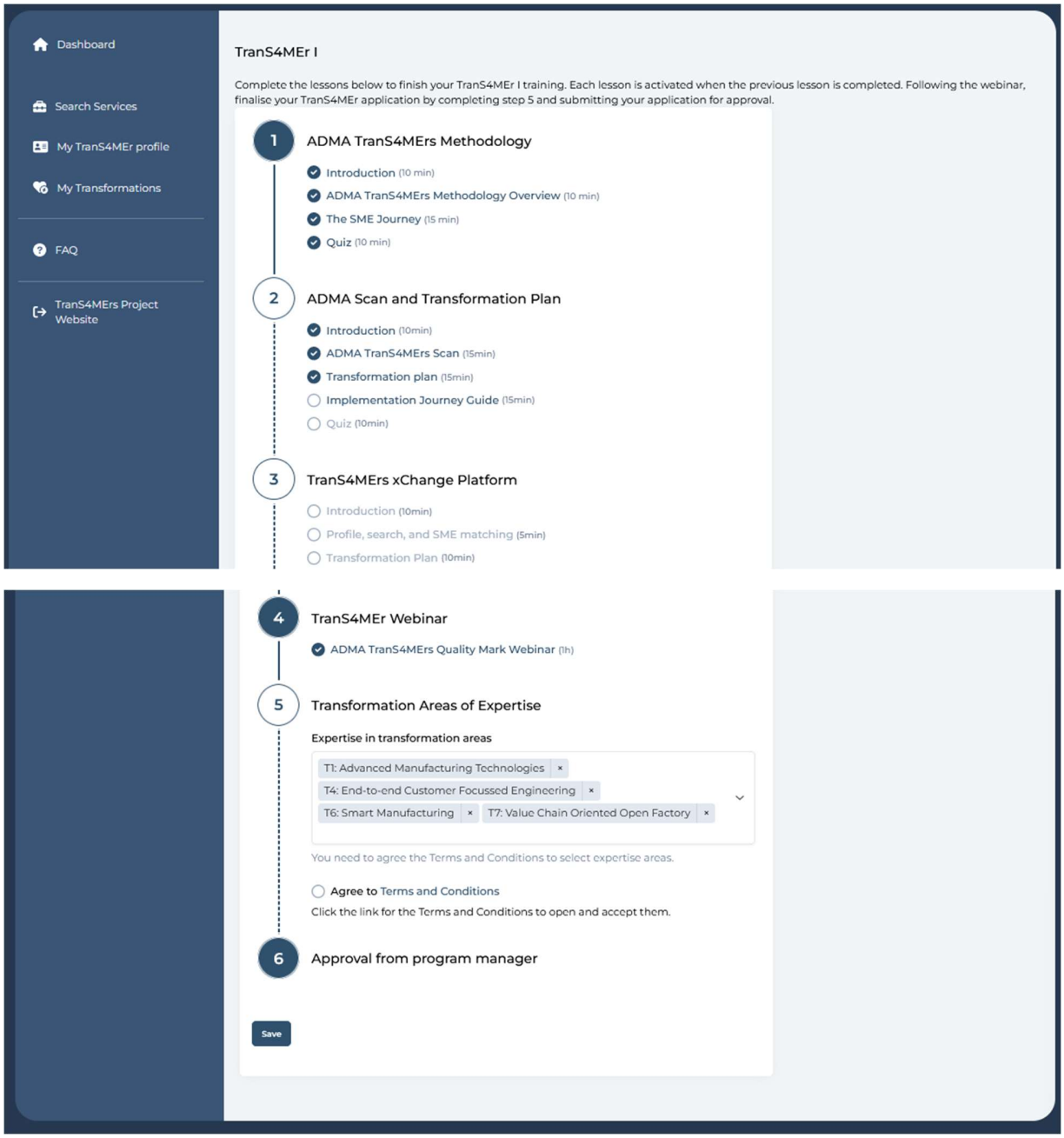

Figure 16: The TranS4MEr training to obtain the Quality Mark

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6.3.4 My TranS4MEr Requests

TranS4MErs have access to collaboration requests from SMEs. The ones they accept are then presented in the My Transformations section.

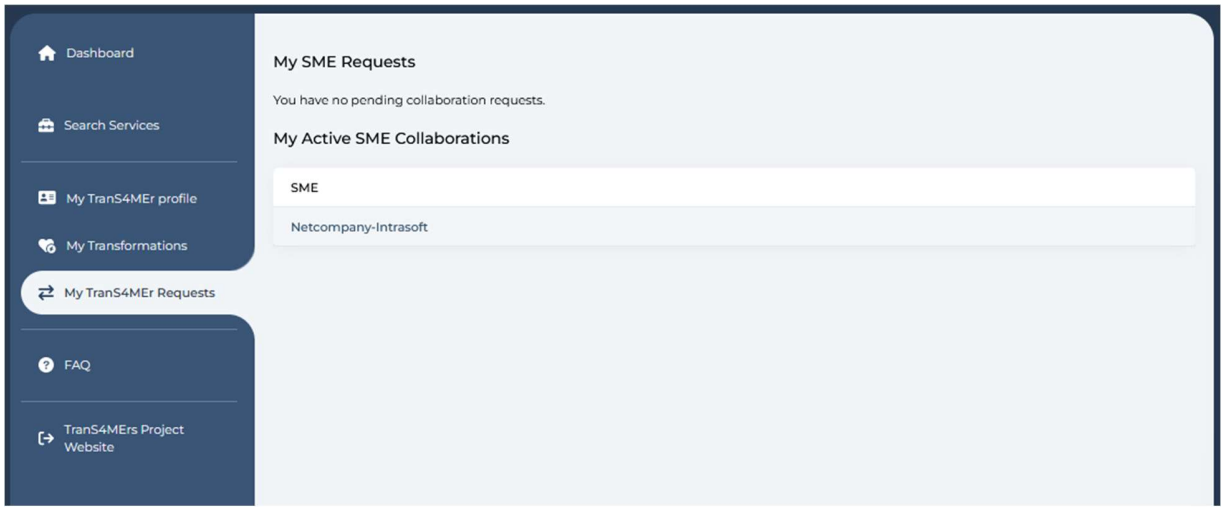

Figure 17: Receiving and accepting collaboration requests from SMEs

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6.3.5 My Transformations

In this section of the platform, TranS4MErs have access to the list of transformation journeys they work on in collaboration with SMEs.

Within each transformation journey they have access to the specific tasks they need to perform, such as developing the Transformation Plan, selecting KPIs for monitoring theSME's progress and compiling a list of services the SME should implement during their transformation journey. The My Transformations page is shared with the SME, however each user type has access to different parts of the service.

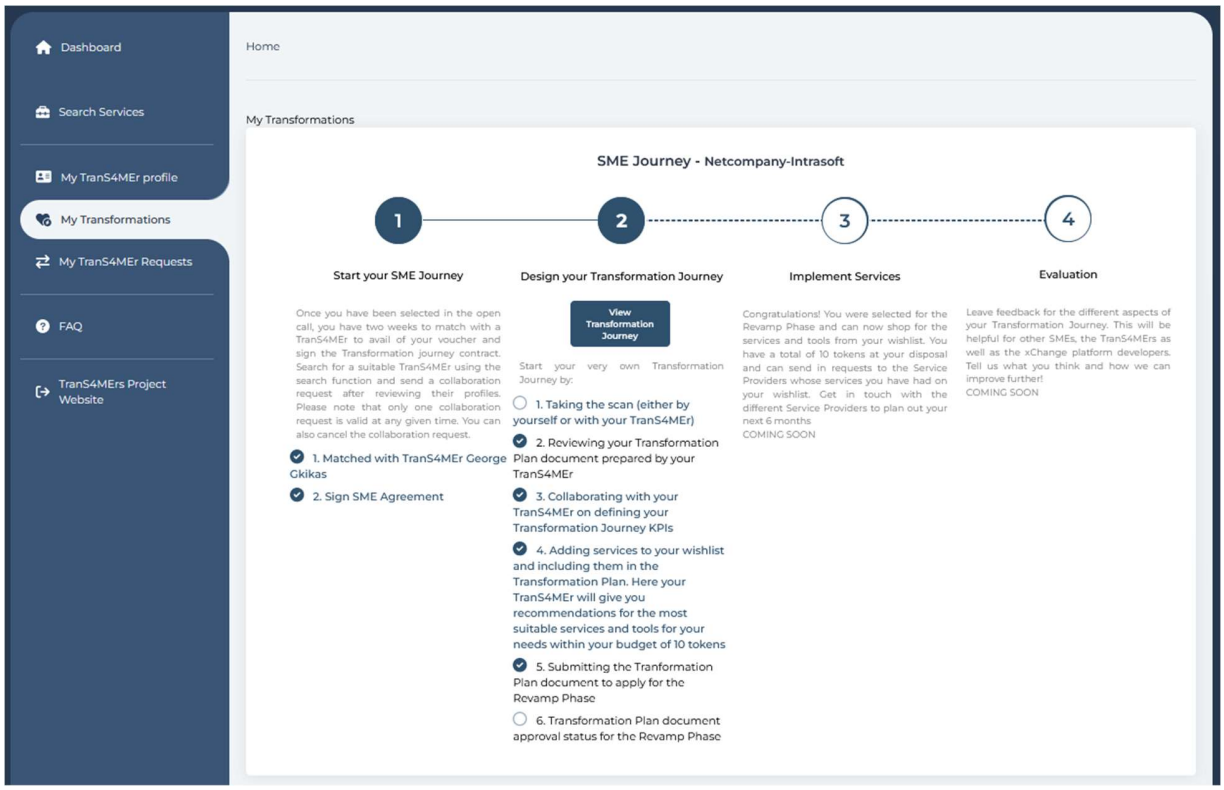

Figure 18: The SME transformation journey – TranS4MEr view

6.4 SME Functionality

6.4.1 Create SME Profile

SMEs that enter the platform for the first time, have the option to either retrieve their company data from the collaborating platform F6S and request a voucher for proceeding with the design phase of the project, or create their profile directly on the xChange platform, and have limited access to the platform's functionality.

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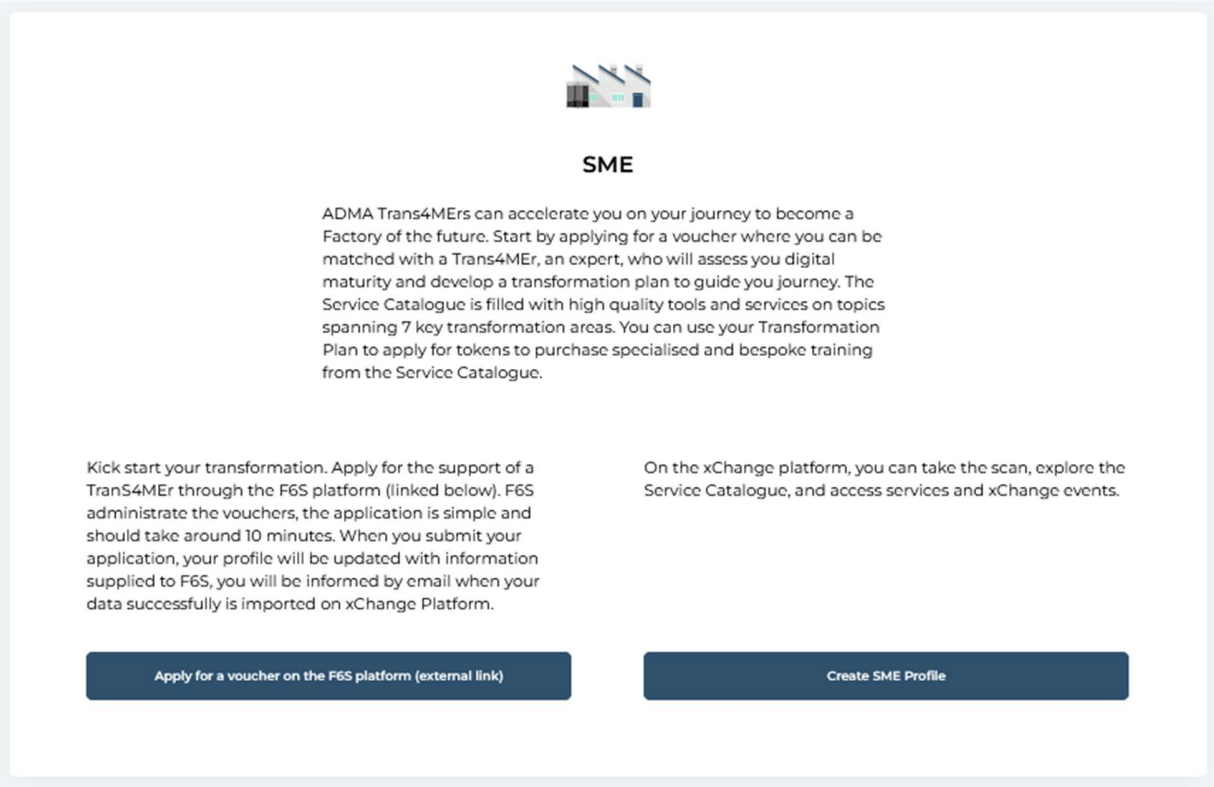
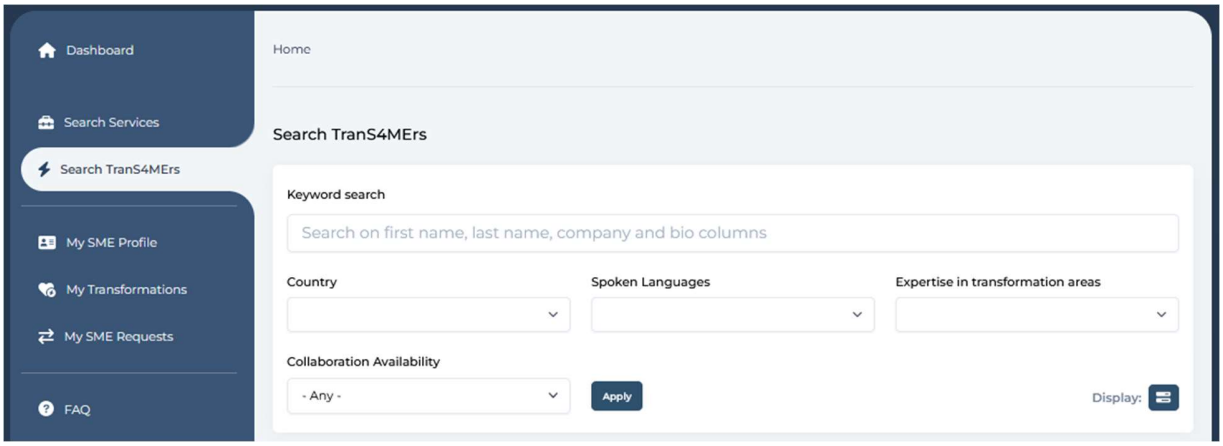


Figure 19: Creating an SME profile

6.4.2 Search TranS4MErs

SMEs can search for TranS4MErs based on numerous criteria, such as keyword, language, country, expertise. Results are presented in the form of business cards. Users can then select a TranS4MEr to view their profile in detail and send them a collaboration request.



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 101037866.

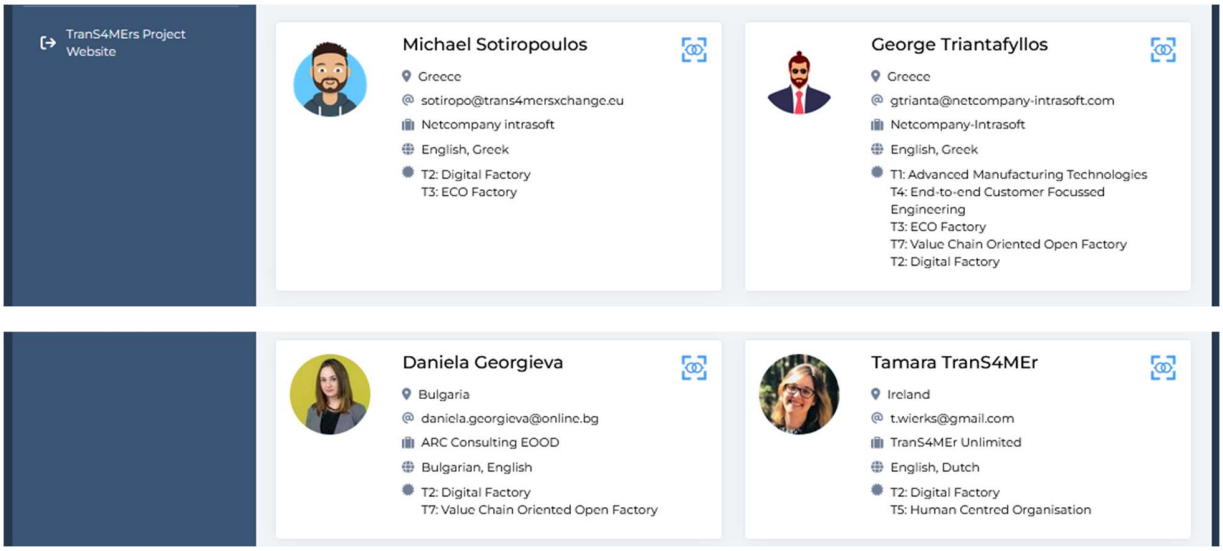


Figure 20: Searching for TranS4MErs

6.4.3 My SME Profile

In this section SMEs can edit details in their company profile.

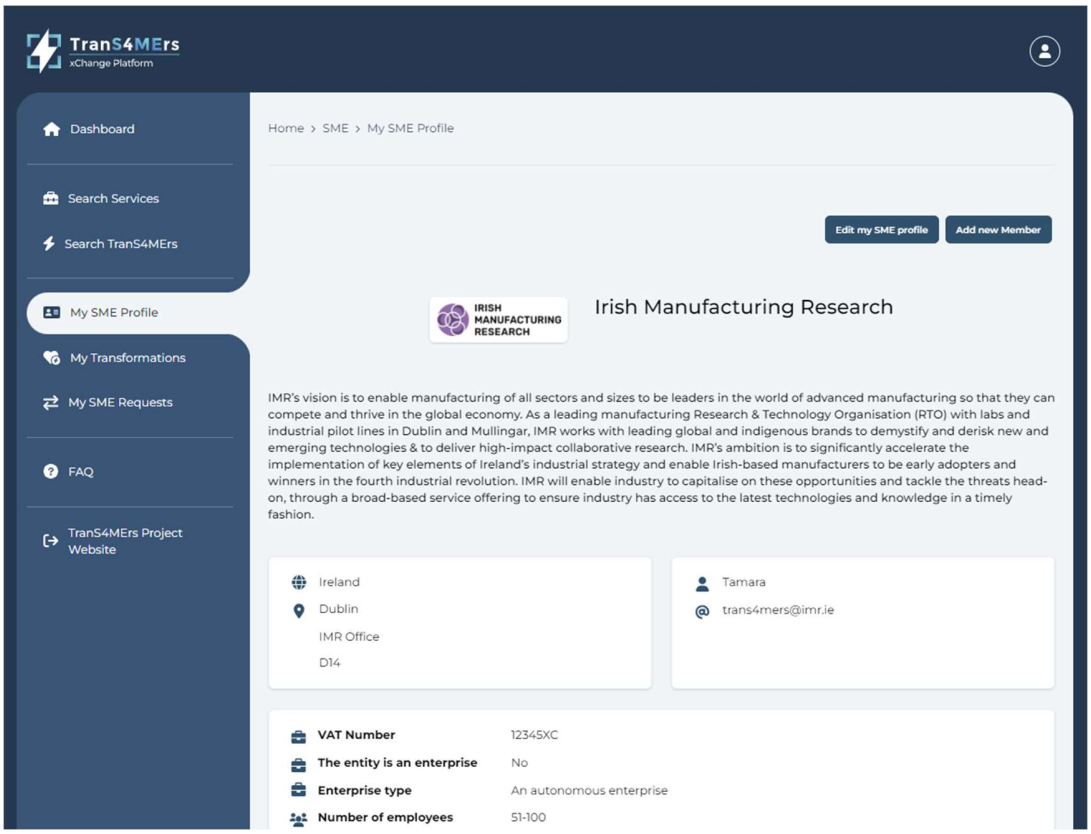


Figure 21: Overview of an SME profile

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6.4.4 My Transformations

In this section, SMEs have access to all the activities they need to complete in their transformation journey. They can search for, select and establish collaboration with a TranS4MEr, sign the collaboration agreement, take the scan, review the Transformation and Implementation Plan developed by their TranS4MEr, purchase services and evaluate the entire process once their journey is complete.

The My Transformations page is shared with the TranS4MEr, however each user type has access to different parts of the service.

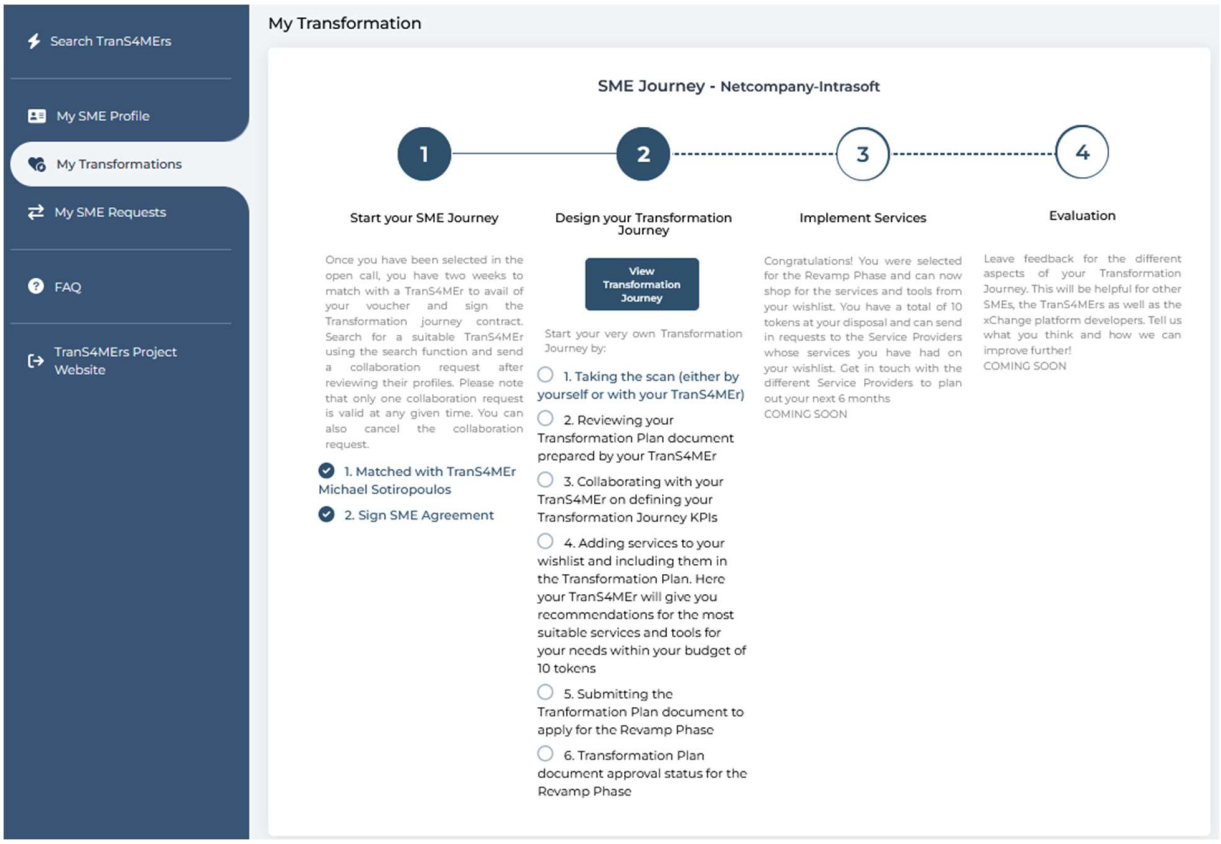

Figure 22: The SME transformation journey – SME view

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6.4.5 Transformation Journey Portfolio

In this section, SMEs have access to the portfolio of documents and other material related to their transformation journey.

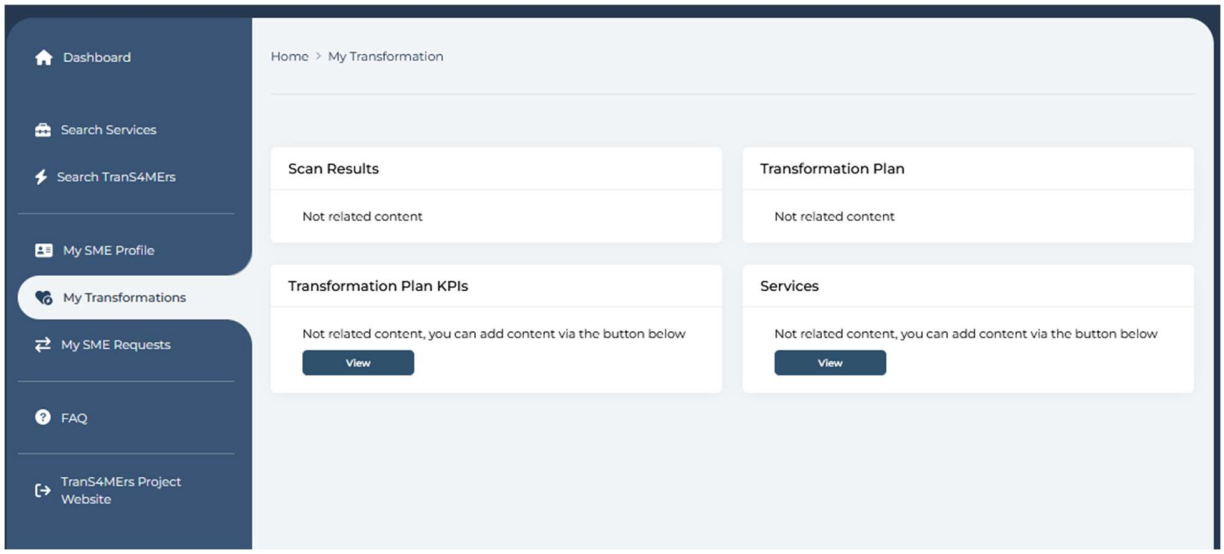

Figure 23: The SME transformation portfolio

6.4.6 Evaluate Services

At the end of the transformation journey, SMEs evaluate the overall process, the services and the TranS4MEr as part of the platform's learning loops. Evaluations are used to improve the functionality provided by the platform and contribute to the ADMA TranS4MErs competitions and leader boards.

6.4.7 My SME Requests

This section presents all collaboration requests sent by the SME to TranS4MErs, the active collaborations, and the feedback provided by SMEs on services.

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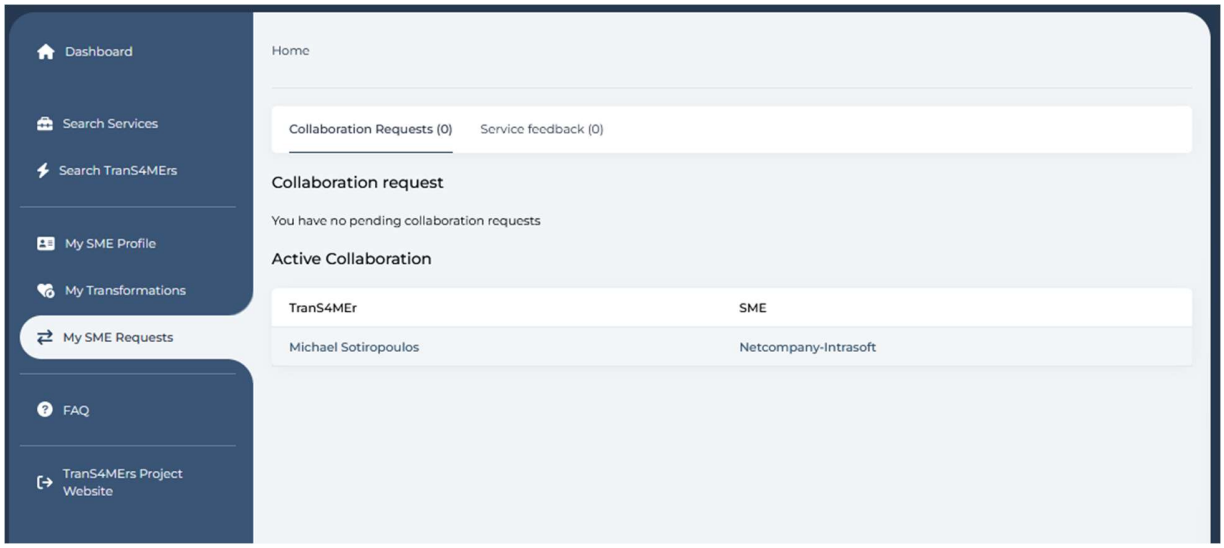

Figure 24: SME requests for collaboration

6.5 Service Provider Functionality

6.5.1 Service Provider Journey Widget

The Service Provider journey widget guides users through the process of receiving the Service Provider Quality Mark, and thus being able to offer their services through the xChange platform.

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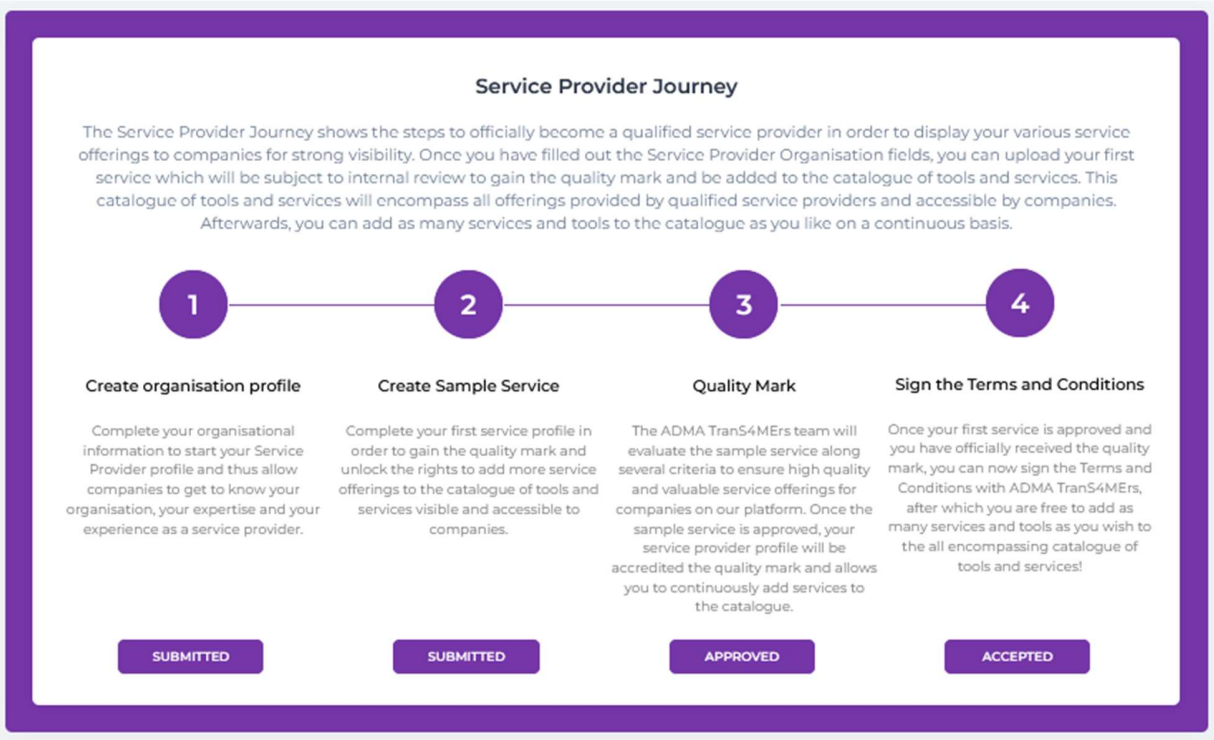

Figure 25: The service provider journey to receive the Quality Mark

6.5.2 My Service Provider Profile

The Service Provider profile includes a comprehensive description of the Service Provider organization, a list of the services they offer, their overall evaluation and the number of services they have sold through the xChange platform.

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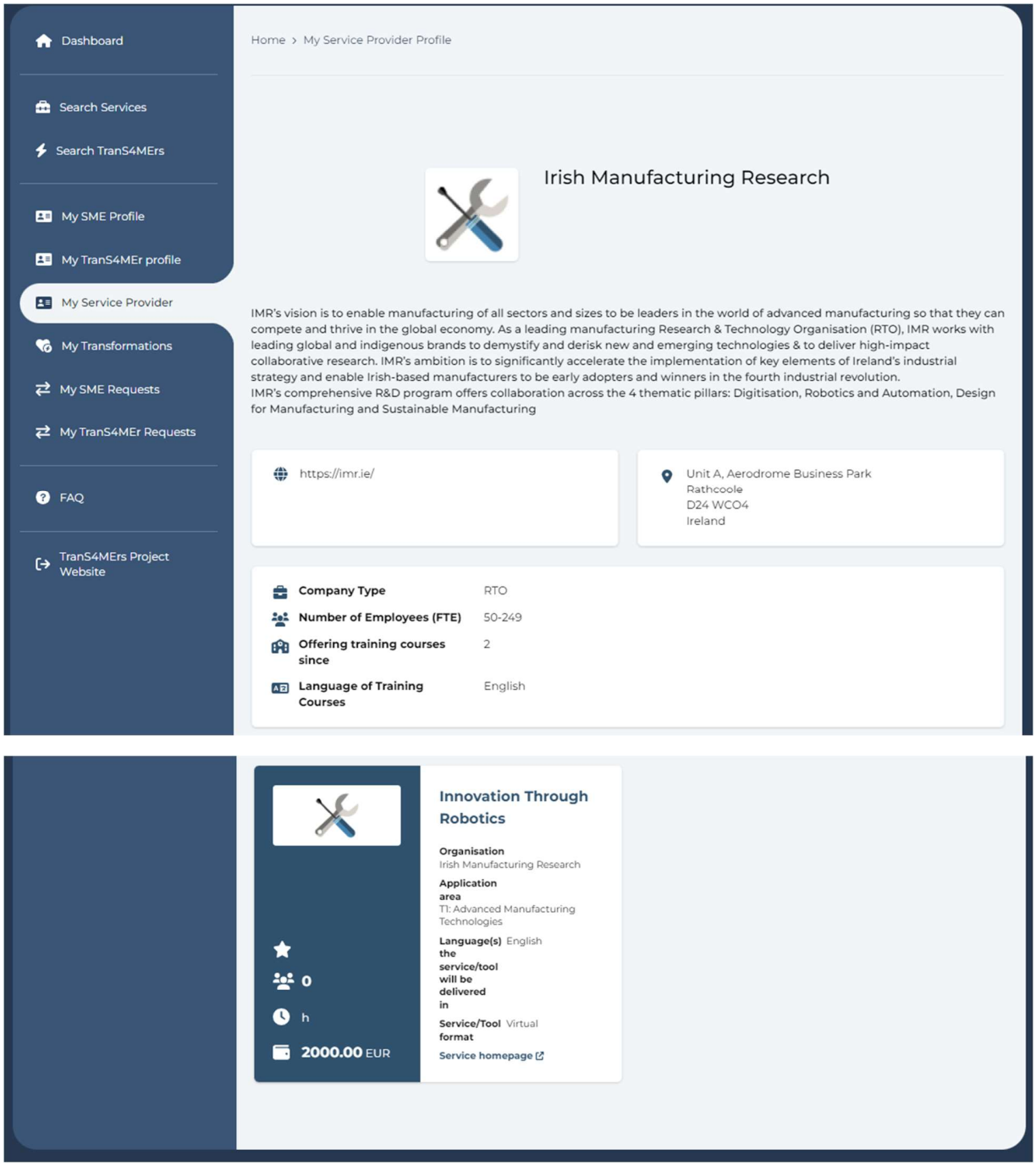

Figure 26: The Service Provider profile and services

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6.5.3 Add Service

This section enables Service Providers to upload their services' description into the xChange platform (Service Catalogue).

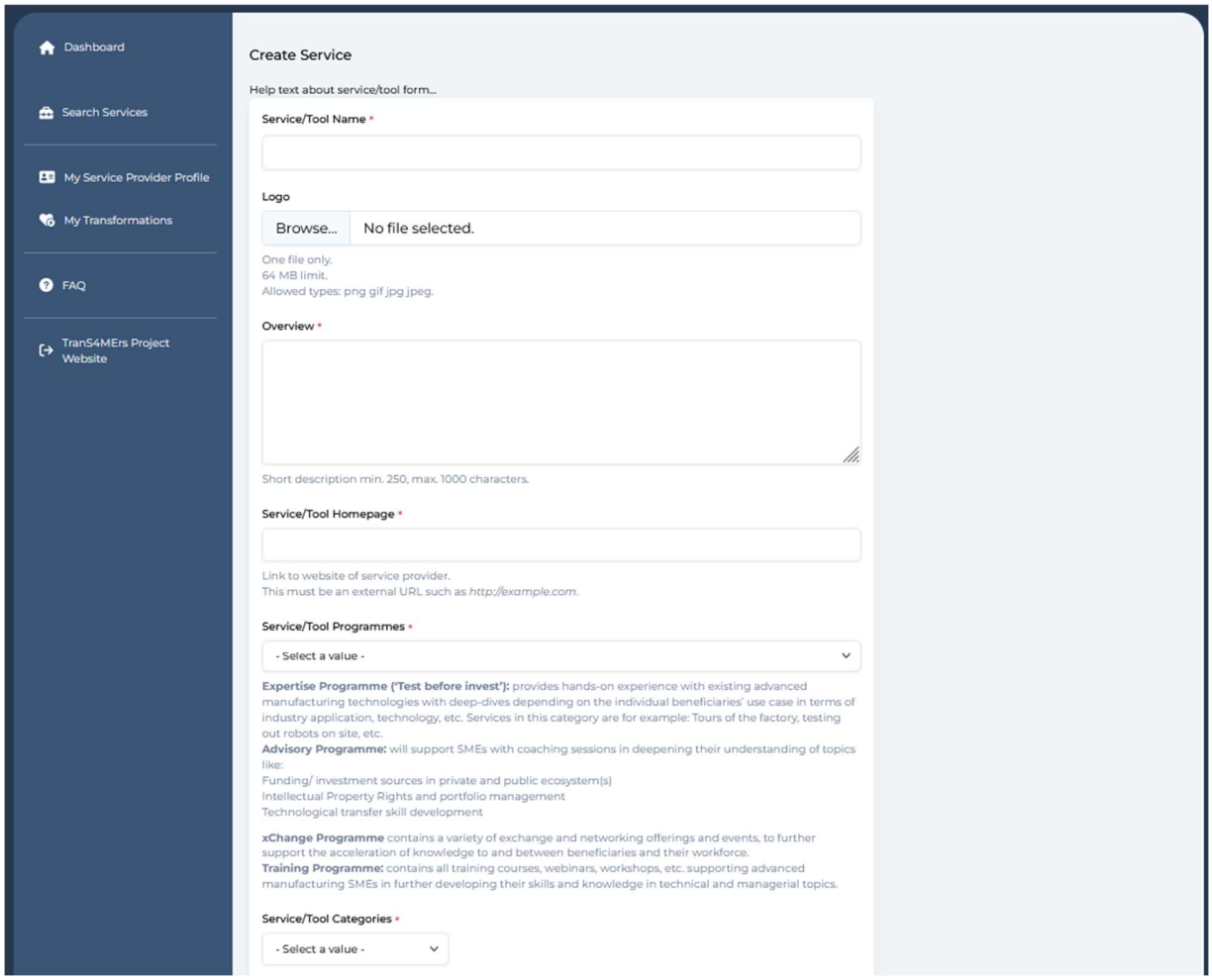

Figure 27: Adding a service to the catalogue

This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 101037866.

7. Conclusions

The xChange platform was delivered on M13 of the project (initially scheduled for completion in M12), enabling all related stakeholders to create their profiles, receive Quality Marks (where applicable) and initiate their collaboration through the SMEs' transformation journey.

Following the learning loops concept of the ADMA TranS4MErs methodology, it is foreseen that the development process will continue beyond M13 to enable platform improvement based on the feedback received by the actual users during the first months of operation. Feedback from the Advisory Board will also result into platform improvements.

A redesign of the graphic design is also in progress, to improve the look and feel of the platform based on comments received during the last phases of user testing.

The xChange platform will continue to evolve throughout the project to ensure that all stakeholders involved will receive high quality services and a seamless experience during the digital transformation process.

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