Company Handbook

Changelog

v2.0 _ 2021.05.28

_Update of document to Company Handbook 2.0

v1.0 _ 2021.03.26

_Delivery Version

Company Handbook

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Vortex's goal is to create innovative solutions that will bridge the gap between people and technology. Nevertheless, we strive to follow the principles of inclusion with our clients, from various fields. To tackle the challenges that are presented to us, we have available human resources utterly specialized in informatics, UX/UI, interface and design, services and management.

Just as The New European Bauhaus is a creative and interdisciplinary movement, so is our company composed of 4 multidisciplinary teams, specialized in different areas, which brings the creativity pool to its maximum potential.

We value the principles of affordability, simplicity, accessibility, functionality, inclusion, innovation, experimentation, connection and transformation, which are at the core of the idea of improving the quality of our living, co-existing experience. We seek to merge technology, science, art and culture in a prosperous and balanced environment.

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Company Handbook

Overview

This is Vortex's company handbook. This document presents the information about Vortex's culture, values, organization structure, internal processes, and principles of quality standard.

The handbook is also a summary of Vortex's organization and procedures, which are presented here to ensure the adequate quality of our services and products, as well as the management system. It serves as a guide to Vortex's employees and a visit card to all that intend to know more about the company.

Objectives

The Vortex family has transversal corporate values, adapted to the internal and external environment and business context, particularly its positioning amongst partners and customers. The scope is:

- Present Vortex company and its philosophy
- Define Vortex's business approach
- Analyse the market's environment
- Provide a general overview of Vortex's internal processes
- Explain Vortex's Quality Policy and contingency actions

The main goal is to ensure that the best practices are applied on the management of processes and resources, thus promoting the satisfaction of Vortex's customers and other interested parties/stakeholders.

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Vortex

Vortex History

Vortex was born in 2021. The LGP course ("Laboratório de Gestão de Projetos" - "Project Management Laboratory") in FEUP was the moment when the employees of the Vortex family met and understood that the differences that separate them are the ones that brought them together. From the CEO, department directors, to operations, services, and multimedia professionals, we all understand that working as a team will lead Vortex to better solutions and high-quality services.
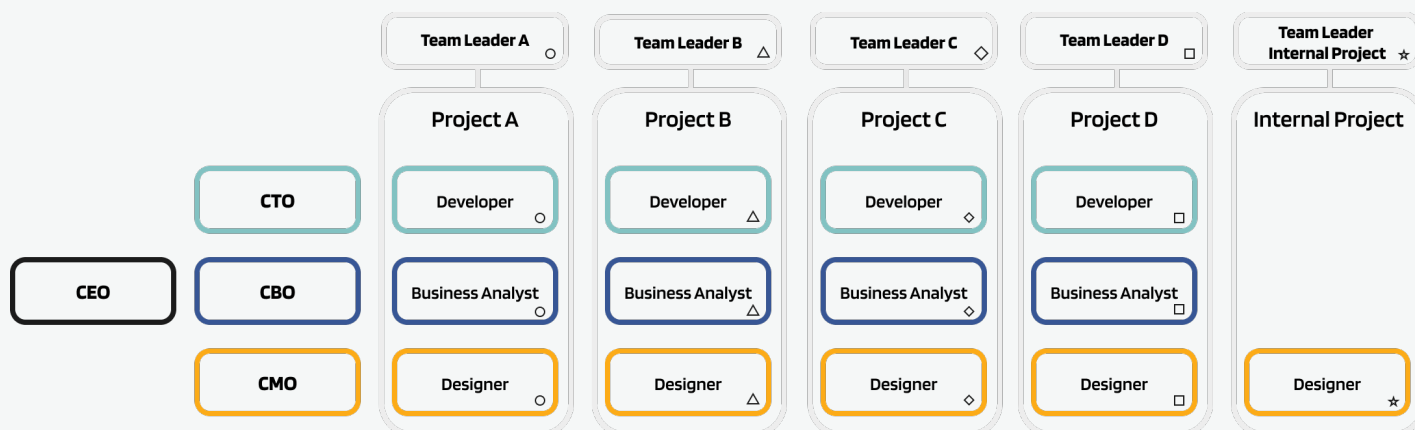
Mission and Vision

Our mission is to provide top quality software products for businesses and institutions who seek the best solutions for their customer's needs through simplicity and quality. Vortex's vision is to bridge the gap between people and technology, through innovation. Vortex's mission focuses on striving to always maintain a close relationship with clients coming from various fields and provide technological solutions and improvements to their specific challenges and needs, with the goal of allowing them, and their products, to be more effective, efficient and ultimately more successful.

Company Organization

The Vortex family is a multidisciplinary team, where the knowledge of different backgrounds allows the company to have complementary know-how, experience, skills and qualifications that will contribute to the achievement of the expected results by the company and each corresponding project.

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The Vortex family

Team Leader A ○	Team Leader B △	Team Leader C ◇	Team Leader D □	Team Leader Internal Project ★
Project A	**Project B**	**Project C**	**Project D**	**Internal Project**

CEO — CTO, CBO, CMO

Team	Name	Course	Role
	Cláudia Martins	MIEIC	Team Leader / Project Manager
	André Mori	MIEIC	Implementation Manager
	Augusto Osório	MM	Usability and Interface Design Manager
Team A (CPF APP)	João Lopes	MESG	Usability and Interface Design Manager / Image, Communication and Marketing Manager
	João Pacheco	MM	Usability and Interface Design Manager
	José Silva	MIEIC	Support Manager
	Lucas Stein	MIEIC	Requirements Manager

	Luís Oliveira	MIEIC	Process Manager
	Miguel Romariz	MIEIC	Process Manager
	Sérgio Dias	MIEIC	Planning Manager
Team B (e-Valuate)	Vitor Ventuzelos	MIEIC	Team Leader / Planning Manager
	Matilde Santiago	MESG	Quality Manager
	Filipe Barbosa	MIEIC	Process Manager
	Bernardo Branco	MM	UI/UX Manager
	Bruno Fernandes	MIEIC	Quality Manager
	José Simões	MIEIC	Process Manager
	José Martins	MIEIC	Design Manager
	Margarida Pinho	MIEIC	Planning Manager
	Afonso Sá	MIEIC	Design Manager
	Paulo Moutinho	MIEIC	Implementation Manager
	Leonardo Moura	MIEIC	Implementation Manager
	Célio Rodrigues	MM	UI/UX Manager
Team C (Air Med Digital)	Tito Griné	MIEIC	Team Leader / Project Manager
	António Dantas	MIEIC	Quality Manager / Documentation manager
	Eduardo Macedo	MIEIC	Planning Manager / Requirements Manager
	João Mota	MIEIC	Support Manager
	João Varela	MIEIC	Design Manager / Implementation Manager
	José Baptista	MIEIC	Process Manager / Implementation Manager
	Luís Henriques	MIEIC	Support Manager / Test Manager
	Ana Santos	MIEIC	Requirements Manager / Planning Manager
	Tomás Santos	MIEIC	Test Manager / Architecture Manager
	Jessica Leão	MESG	Planning Manager / Process Manager

	Carmen Silva	MM	Image, Communication and Marketing Manager
	Gracielle Sampaio	MM	Usability Manager / UI/UX Manager
Team D (Labcentric)	Eduardo Ribeiro	MIEIC	Team Leader / Project Manager
	Carlos Albuquerque	MIEIC	Requirements Manager / Usability Interface Design Manager
	Daniel Silva	MM	Usability and Interface Design Manager
	William Lobo	MESG	Quality Manager / Process Manager
	César Nogueira	MIEIC	Quality Manager / Process Manager
	Pedro Esteves	MIEIC	Test Manager
	Miguel Pires	MIEIC	Architecture Manager / Implementation Manager / Image, Communication and Marketing Manager
	Luís Costa	MM	Image, Communication and Marketing Manager
	André Moutinho	MIEIC	Design Manager / Implementation Manager
	João Luz	MIEIC	Requirements Manager
	João Macedo	MIEIC	Test Manager
Internal Project	Rita Garcia	MM	Team leader / Project Manager / Quality Manager
	Mariana Ribeiro	MM	Planning Manager / Support Manager / Communication Manager

Resources

Vortex generates value through resources that can be divided into tangible and intangible. The resources that Vortex can count on are:

Tangible Resources, which are the physical assets of an organization, such as people and finance.

   - Financial Resources: Vortex's budget is presented in the LGP Challenge.

   - Physical Resources: While amidst a pandemic, with lockdown, the necessary infrastructure is basic:
      - Unlimited internet access.
      - Personal computers with access to the necessary programs and tools.

Intangible Resources are non-physical assets such as information, reputation, and knowledge.

   - Technology Resources: The Vortex family has different backgrounds related to technology, network, data integration, business software, IT architecture, service engineering, project management, business process management and multimedia.

   - Human resources: The Vortex family is what makes this company what it is. It is composed by 50 people, of which 46 are divided into 4 teams according to its allocated project, and 3 are allocated to internal projects.

Communication

Internal

Vortex takes communication processes as a priority to guarantee management of expectations between teams. The methods of communication used, in order to be effective, are:

- Management meetings between board of the company and supervisor.

- Team meetings.

- Meeting minutes, every document and deliverable available in the cloud (OneDrive, Teams and GitHub) for all Vortex members.

- For routine and frequent communication, every company member uses the Discord application, allowing the creation of both general and specific channels, for each project's team or deliverable.

- Project progress reports updated and available to help in decision-making of the company.

External

Vortex needs to guarantee communication with clients, so as to understand their needs and expectations and manage them in order to create and deliver value. Vortex's communication with the clients and partners is done through:

- Periodical meetings between each project's team and client.

- E-mail communication regarding some doubts related to each project and meeting minutes.

- Presentation of the company to the clients and the supervisors through the review and Final Presentation of the LGP challenge.

- Presential meetings with the client to validate solutions, understand and manage final users' perceptions.
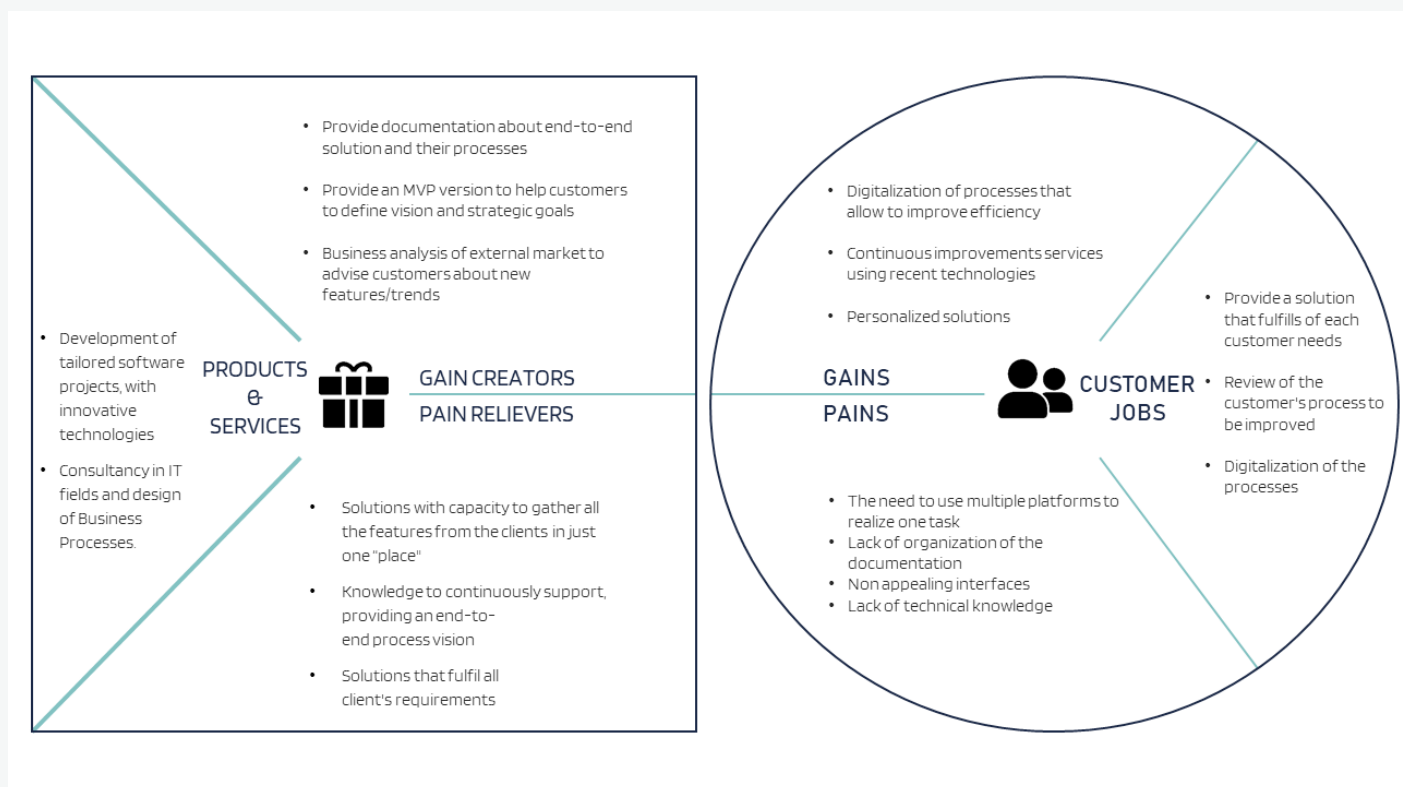
Business Model

According to Vortex's strategy, solutions are developed taking into consideration the customer business goals and user needs, allowing the co-creation of value with customers and present innovative solutions.
Vortex is devoted to developing and continuously improve the effectiveness of solutions, prioritizing their accuracy and giving an immediate support during acceptance and implementation, while also helping clients to increase business performance. During this process, Vortex will improve self-development and create career opportunities for our team. Vortex's future weighs on creating the next generation of leadership.

Value Proposition Canvas

Vortex is not only concerned with the development of IT solutions, but also with the development of its clients, which is carried out through the digitalisation of their processes, allowing them to save not only money, but also time. The same is supported by multidisciplinary and experienced teams, using Agile work methodologies to always deliver the best possible result.

PRODUCTS & SERVICES

- Provide documentation about end-to-end solution and their processes
- Provide an MVP version to help customers to define vision and strategic goals
- Business analysis of external market to advise customers about new features/trends
- Development of tailored software projects, with innovative technologies
- Consultancy in IT fields and design of Business Processes.

GAIN CREATORS
PAIN RELIEVERS

- Solutions with capacity to gather all the features from the clients in just one "place"
- Knowledge to continuously support, providing an end-to-end process vision
- Solutions that fulfil all client's requirements

GAINS
PAINS

- Digitalization of processes that allow to improve efficiency
- Continuous improvements services using recent technologies
- Personalized solutions
- The need to use multiple platforms to realize one task
- Lack of organization of the documentation
- Non appealing interfaces
- Lack of technical knowledge

CUSTOMER JOBS

- Provide a solution that fulfills of each customer needs
- Review of the customer's process to be improved
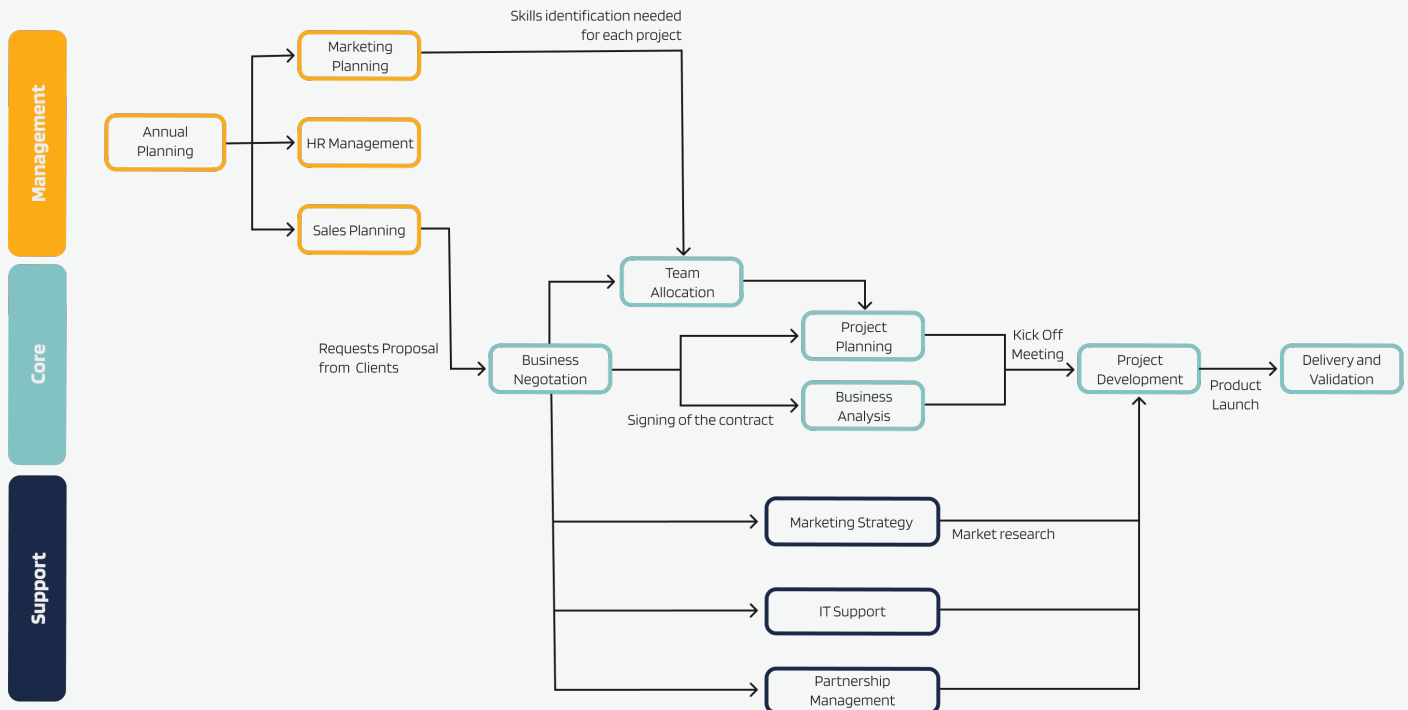- Digitalization of the processes

Business Model Canvas

Through the Business Model Canvas, it is possible to develop and design the company's business model by describing 9 essential aspects. It will allow us to understand how we create value for customers when focusing on new technological solutions, our culture, and values, that guide our business.

Key Partners	**Key Activities**	**Value Propositions**	**Customer Relationships**	**Customer Segments**
FEUP Institutions with interests in our projects	Business Analysis and Negotiation Project Planning IT Consulting and Support Marketing and Communication	Vortex offers a consultancy service that helps clients to optimize and design processes, finding solutions and technological improvements, integrated, efficient an adapted to the needs of each client. Accessibility Trust Availability Customization	Team Leaders Personalize Service Regular meetings with clients to manage expectations and update the current project information	Private and public companies/institutions that want to optimize processes and implement IT solutions
	Key Resources		**Channels**	
	Human resources such as Front-end and Back-end Developers, UX/UI, QA, Business Analyst and Team Leaders Online platform/website FEUP offices Licenses		Website Email Social Media Partnerships	

Cost Structure	**Revenue Streams**
Human Resources Operational costs: fees and licenses Capital costs Maintenance Costs Research and Development for usability tests	Project Fees Solution sales

Process Map

The process map explains what processes are involved in the activity of the Vortex company, and are divided in: Management processes, Core processes and Support Processes. The Core processes are related to the core business of the company and services necessary for the service provision. Then some processes are identified to support the core processes, and the management processes impact the whole company.

In order to understand, in more detail, each process of our process map, each process is described in the respective table below.

1. Annual Planning

From: Management (composed by CEO, CTO, CMO and CBO) | **To:** Company

Input: Market analysis and results from past year

Operations: Predict activities for next year, as well as budget and plan of activities.

Output: Budget and Plan of activities

2. Marketing Plan

From: Multimedia Department | **To:** Company

Input: List of company goals and quantity of budget available

Operations: Define the marketing strategy and a detailed plan of action to accomplish these goals

Output: CMPK (Company Media Press Kit)

3. HR Management

From: People department (to be created) | **To:** Company

Input: Needs from project teams or departments

Operations: Manage and hire human resources according to the needs of the company

Output: Allocation of human resources in the project teams and respective departments.

4. Sales Planning

From: Management | **To:** Sales Team (to be created)

Input: Market analysis and forecasts based on last results

Operations: Plan new proposals and sales of company services

Output: New project deals with clients

5. Business Negotiation

From: Sales Team | **To:** Company

Input: List of needs and goals for the clients' projects

Operations: Contract negotiation, budget of each project and scope definition

Output: Project budget and scope defined and aligned between the company and the client

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6. Team Allocation

From: People department	**To:** Team Leader

Input: Project plan, budget and scope defined

Operations: Allocate people according to the needs and budget of each project

Output: Project team defined and ready to start the project planning

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7. Project Planning

From: Team Leader	**To:** Team

Input: Project scope and team allocation

Operations: Plan the activities of the project, dates of the deliverables and sprints

Output: Project Plan defined, with roadmap of main deliverables of the project

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8. Business Analysis

From: Services department	**To:** Team

Input: Scope definition and elicitation of requirements in meetings with clients

Operations: Elicitation of requirements, negotiation with client and production of deliverables for the client and documentation for the team

Output: List of User stories defined

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9. Project Development

From: Team	**To:** Company

Input: List of User stories defined

Operations: Production/development and testing of code

Output: Build of application/system, according to the list of user stories

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10. Delivery and Validation

From: Team	**To:** Client

Input: List of functionalities implemented

Operations: Testing and support in acceptance

Output: Acceptance Phase concluded

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11. Marketing Strategy	
From: Services Department	**To:** Company
Input: List of previous results of the company's marketing strategies and the future needs of the company in terms of market positioning	
Operations: Planning of a new marketing strategy, analysing the alternatives of allocation of the company's resources and its needs	
Output: New marketing strategy defined	

12. IT Support	
From: Support team (to be created)	**To:** Company
Input: List with needs of improvements and repairs related to IT devices	
Operations: Execution of improvements and repairs required by the company	
Output: Companies' IT devices supported and working perfectly	

13. Partnership management	
From: Management (composed by CEO, CTO, CMO and CBO)	**To:** Company
Input: List of goals for positioning in market and list of partners available to discuss possible partnerships	
Operations: Analysis of the partners' market operations, according to companies' goals and objectives	
Output: An efficient and well-structured relationship with partners, helping the company accomplish its goals.	

Quality

Policy

Vortex's consulting company is committed to define and meet client's needs and expectations in a planned and ethical way. Furthermore, it is important to see Quality Policy as a fundamental document that guarantees the fulfillment of the mission and vision. Vortex is committed to:

- Assure that all the Vortex family has access to this policy.

- Setting, monitoring, and reviewing objectives to support our business goals.

- Establishing processes to ensure our client's needs and expectations are met.

- Developing and implementing appropriate business solutions and processes.

- Development and training, arming all our employees with the knowledge and tools to provide a better service.

- Continuously improving the quality of our services and deliverables by ensuring process optimization and greater agility, based on ISO 9001 quality standards.

Procedures

Vortex must define the procedures to ensure everyone knows how to apply the quality policies defined previously. For every procedure there are some key points to follow, that are: who is the responsible for the task, to whom should it be reported to and which steps should be followed to complete the procedures.

Technologies and Communication: As a home office company, the use of remote technologies to ensure the business continuity is a crucial part for the company's daily work. Furthermore, our company should work closely with the employees and all the other stakeholders, aiming to provide a successful environment to the remote work. The official company channels are Discord for informal communication, OneDrive as a backup repository and Microsoft Teams for official communications and documents drive, and GitLab for project planning and source code management. For tasks delegation and management, we use Trello to ensure that no task is missed, so that the access to internet is mandatory.

Internal Meetings: to ensure that all members of the Vortex family are aligned, there are weekly meetings on different levels of the company:

    - Meetings between C*O's: CEO, CTO, CBO and CMO;
    - Meetings between C*O's and Team leaders of each project;
    - Meetings in each department: Multimedia, Services, and Informatics.
    - Meetings in each project

External Meetings: Video conferencing meetings using Microsoft Teams tools, where the goal is to ensure the project is going on the right path. It is recommended that all projects should have a follow-up with the clients and all the other stakeholders.

Documentation and Validation: Regarding the necessary documentation for each active project in the company, it's considered important that, first of all, each Team Leader can validate the documents, and then the Chiefs should give their opinion and validation too. Documents should be updated whenever necessary and whenever there is feedback. Only then will it be possible to guarantee greater internal and external transparency.

The multimedia department is also responsible for standardizing company documents and, therefore, all of these must be ready, at least 3 days before each delivery.

Deliverables and Communication: Vortex primes for quality and standards, so each deliverable and communication should follow branding created by Multimedia Department with help from the Services Department.

Some examples of this branding, available in Teams Company folder, are the signatures for emails, backgrounds for online meetings, font and chromatic pallet for documents, mockups and the company's official logo.

Marta Faria
CBO | Services Department

Email: up202001763@fe.up.pt
Phone Number: 911775906

FEUP – R. Dr. Roberto Frias, 4200-465 Porto

Figure 1– Example of the company's signature.

Retrospective: In Vortex, we believe that we need to constantly review processes and improve. To facilitate this, Vortex has been developing a culture of self-evaluation, feedback sharing and effective communication, using a model of retrospective that can be applied to teams or departments.

The retrospective should start with a moment of sharing personal experiences or team building. After that, each person of the team/department can add post-its in each column: What I loved, what I learned, what didn't go well and actions. After that, the retrospective promoter should read and start discussion about each post-it, grouping them in case they are about the same topic. To finalize the session, each person can evaluate the project and the team environment from 1-5. The inputs should be taken into account by the team leader or managers, to improve the work methodology at Vortex.

Figure 2 - Retrospective board template.

Project Development: For the development of the entire project, Vortex has established a method of organizing and planning this entire implementation process, which leads to the creation of value, representing a cycle based on constant feedback. The process of developing the work consists of writing User Stories that reflect the constant needs of the customers. The next process goes through ideation, development, testing and deployment. In the end, it is important to have a review and a retrospective.
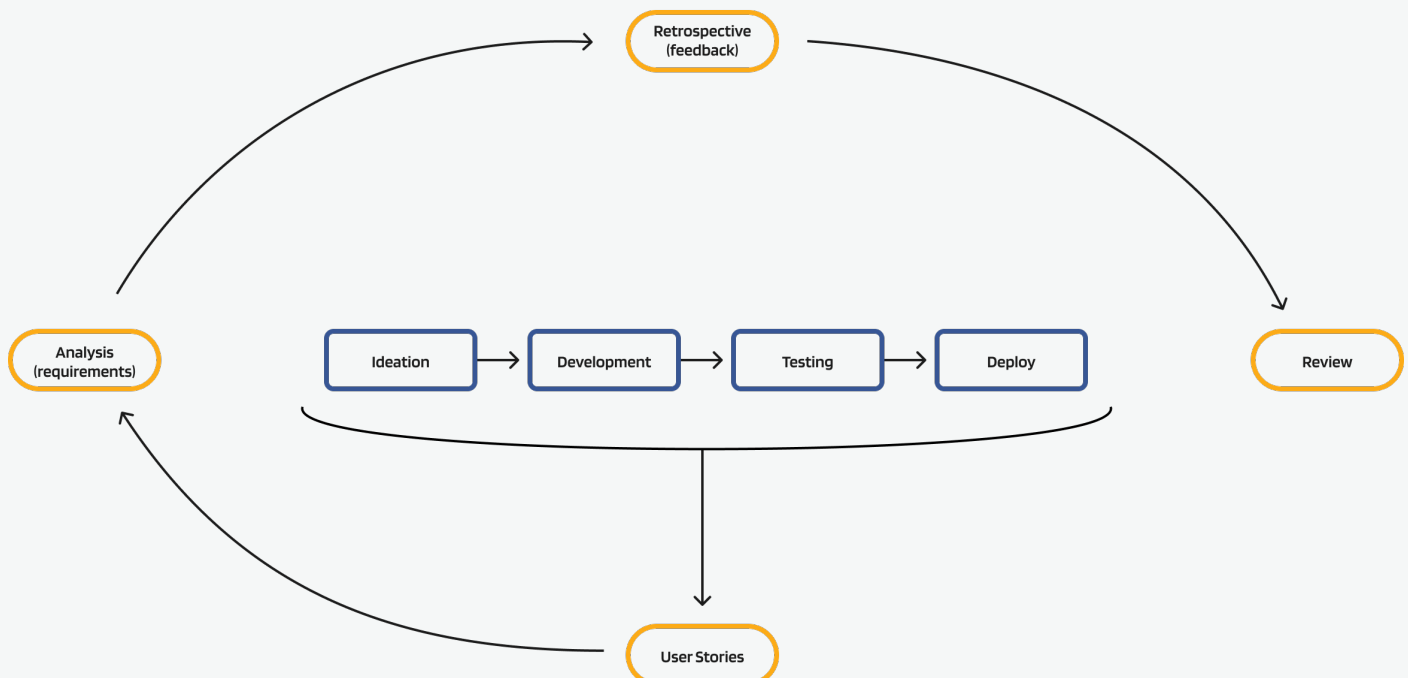
The impact of COVID-19 in Vortex

Safety

Due to this pandemic, Vortex is implementing all DGS recommendations to break the virus' chain of transmission and ensure the well-being of every employee, partner, customer, and respective families.
The first DGS recommendation for active companies during the pandemic situation is for the teleworking regime to be applied whenever possible, so that our company is in its home office, working closely with FEUP to provide technological conditions for remote work. This way, the company considers that the communication and information about the current situation is important to guarantee the well-being of all our stakeholders.
The Vortex family is fully available to assist every project's needs via phone or email.
Furthermore, the Vortex family should take into consideration the following daily measures:

    - Wash your hands frequently, with soap and water, rubbing them well for at least 20 seconds.

    - Cough or sneeze into the arm with the flexed elbow, not the hands.

    - Avoid touching the eyes, nose and mouth with hands.

    - Disinfect all frequently used equipment.

    - Adopt responsible social behaviors by eliminating physical contact and applying social distancing, including the minimization of time spent outside the house. When outside, the 2m distance rule should be applied whenever possible.

    - Assume civil and social responsibility to ensure that you don't have contact with people with Covid-19.

- If you are in contact with someone who is infected or suspected of being infected, you should self-isolate immediately.

- Contact DGS authority's trough "Saúde 24" in case of symptoms such as fever, cough or fatigue.

- Contact Vortex in case of Covid-19 positive test result.

Mental Health

Vortex understands the struggles about home office and is available to provide support to all employees. Additionally, we share these guidelines to help you maintain your mental and physical health.

Not all employees feel comfortable in speaking up about mental health, whose definition is "where each individual realizes their own potential, can cope with the normal stresses of life, can work productively and fruitfully, and is able to make a contribution to their community".

The causes of poor mental health at work are workload, related with relationships, working hours, job demands, poor work life balance, control, organizational change and individual factors, i.e., personality, self-confidence and resilience.

One of the main conditions associated with mental health is stress: the adverse reaction that people have to excessive pressure or other types of demands placed on them at work. The causes for stress could be:

- Demands - this includes issues such as workload, work patterns, and the work environment.

- Control – how much a person has over the work they're doing.

- Support – this includes the encouragement, sponsorship and resources provided by the organisation, line management and colleagues.

- Relationships – this includes promoting positive working to avoid conflict and dealing with unacceptable behaviour.

- Role – whether people understand their role within the organisation and whether the organisation ensures that they do not have conflicting roles.

- Change – how organisational change (large or small) is managed and communicated in the organisation.

The possible health implications for Covid-19 are related with: overwhelming anxiety, foul mood, depression, lack of sleep, fatigue, grief, anger and irritability, distraction, poor diet and reduced exercise, musculoskeletal and substance misuse.
We strongly recommend that team leaders schedule regular wellbeing conversations, using the following question examples:

- How are you?
- How are you feeling?
- I have noticed....
- What support do you need?
- What do you need from me right now?
- How are you finding your current workload?
- What challenges are you dealing with?

However, please follow the next table where we present some indicators of poor mental health. If you relate to any of these symptoms or aspects, please contact your team leader and ask for our help, Vortex is here for you!

Physical	Psychological	Behavioural
Fatigue	Anxiety or distress	Increased smoking and drinking
Headaches	Mood changes	Substance misuse
Change in sleep pattern	Feeling down	Withdrawal
Sweating / constantly feeling cold	Indecision	Resigned attitudes
Appetite or weight changes	Loss of motivation	Restlessness
Digestive problems	Distraction or confusion	Increased sickness absence
	Irritability	Uncharacteristic errors
	Loss of humour	Intense or obsessive activity
	Increased sensitivity	Risk taking
	Tearfulness	Working longer hours
	Lapses in memory	Disruptive or anti-social behaviour
	Difficulty relaxing	Irritability, anger or aggression
		Inconsistent or impaired performance

Physical Health

There are a few tricks that may help employees to maintain their health while working from home, being theme:

🗓️ **Schedule:** We shouldn't forget that, even though we are not at the office, we still have a schedule to follow. So, we should create a routine, having a time to start and to stop working. At the end of the day we should "close" our "office" so we don't work overtime.

🖥️ **Workstation:** We might not have the same conditions as we have in the office, but we can improve our conditions with objects we have at home, for example, using books so we can level the computer to the eyesight.

🖥️ **Work Environment:** It is advised to find a place away from the main areas of the house. That way, you will a have a quieter workplace, and you will face less distractions. To avoid such distractions, we shouldn't have our mobile phone nearby, and when we use it we should just stick with productivity apps (unless it's a break).

🤸 **Exercise:** It is advised to stretch frequently, and a good way to do it is by not having water nearby, so we need to get up and fill our glass or bottle. If it is possible, when doing a pause, go outside and get some fresh air. If this isn't possible, then open the windows so there's an air renewal.

Socialisation: Despite of the pandemic and all the restrictions alongside of it, we shouldn't forget to socialize, because it is very important for our mental health. A way to add more human contact to our day is by using videoconferencing platforms such as zoom, skype and so on.

Food: If possible, we should prepare some meals in advance to avoid easy and fast solutions (junk food). It's also advisable to have healthy snacks, such as fruits and nuts.

Communicate: Administrators can't be too task-centered. Ask how somebody is and be truly inspired by the appropriate response. Life is chaotic (particularly at this present time) and we need to accept this.

Monitoring as a Manager: Consider the idea of the work, the individual and your way of life. Build up whether you need to quantify and screen hours, or yield both.