



## D1.1 Project Management Handbook

Active Assisted Living Joint Programme

AAL JP project number: AAL 2019-6-190-CP

Project Acronym: GUIDed

Project Title: Assisted-Living and Social Interaction Platform (GUIDed)

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## List of abbreviations (alphabetically)

Abbreviation	Full name
AAL	Ambient Assisted Living
AB	Advisory Board
APA	American Psychological Association
CMU	Central Management Unit
FRC	Frederick Research Center
EB	Executive Board
HARPO	Harpo Sp. z o. o.
IPR	Intellectual Property Rights
KARDE	Karde AS
KI-I	Kompetenznetzwerk Informationstechnologie zur Förderung der Integration von Menschen mit Behinderungen
MAT	Materia Group
MLA	Modern Language Association
PLATUS	Platus Learning Systems GmbH
RGB	R – red, G – green, B – blue model
TL	Task Leader
WP	Work Package
WPL	Work Package Leader
UCY	University of Cyprus



## Executive Summary

The Project Management Handbook aims to serve as a work guide for the GUIDed project consortium partners. The document is a tool aiming to organize partners' individual and collaborative tasks and attain project goals and objectives in an effective and timely manner. The handbook also serves as a control tool promoting and safeguarding project progress and development according to the expected outcomes.

The present handbook is comprised of different sections encompassing structural and organizational aspects of project management:

The first section focuses on the structural organization of the GUIDed consortium and describes individual partner roles, including their responsibilities and tasks. This section provides details on timelines and delivery of project products.

The second section provides details on the means of communication between consortium partners including physical and virtual meetings as well as the control procedures and responsibilities of each partner.

This section is followed by a detailed description of the means, procedures and methods for consistent creation and delivery of written documents, such as project deliverables.

Finally, the handbook concludes with the description of the archive created in order for consortium partners to have access to all project related documentation and material.

## 1 Introduction

This document aims to support consortium efforts and work progress throughout the GUIDed project. It provides guidance in achieving the project objectives, effectively managing the progress of tasks and ensuring the timely delivery of project results. As such, it contains information about effective and efficient administration, methods for the delivery of project products (e.g., templates), information about timeline and deadlines, means of storage for documents and also means of communication. It should be noted that the present document is dynamic and will be adapted throughout project progress to reflect the current practice in the GUIDed project.

## 2 General project information

The GUIDed project is a collaborative effort of seven partners from four European countries (Austria, Cyprus, Poland and Norway). The project aims to develop a lifestyle ICT product with the main goal to facilitate older adults in their activities of daily life. Specifically, the GUIDed system will offer multimodular services, tailor-fitted to the end-users' needs encompassing five main everyday life domains:

1. Smart Nutrition and Health Service (S1)
2. Smart Home Control Service (S2)
3. Smart City Navigation Service (S3)
4. Smart Home Safety Service (S4)
5. Smart Social Communication Service (S5)

The project start-date is the 1<sup>st</sup> of January 2020 (M1) and completion-date the 30<sup>th</sup> of June of 2022 (M30). The project duration is 30 months. The project coordinator and partners can be found in the following table.

*Table 1. Project partners and their role*

Participant No	Participant organisation name	Participant short name	Organisation type	Role in the project	Country
1 (Coord.)	Agecare (Cyprus) Ltd - Materia Group	MAT	<i>SMALL MEDIUM ENTERPRISE</i>	<i>USER</i>	Cyprus
2	Kompetenznetzwerk Informationstechnologie zur Förderung der Integration von Menschen mit Behinderungen	KI-I	<i>RESEARCH ORGANISATION (NON PROFIT)</i>	<i>RESEARCH</i>	Austria

3	Platus Learning Systems GmbH	PLATUS	<i>SMALL MEDIUM ENTERPRISE</i>	<i>BUSINESS</i>	Austria
4	Harpo Sp. z o. o.	HARPO	<i>SMALL MEDIUM ENTERPRISE</i>	<i>BUSINESS</i>	Poland
5	University of Cyprus	UCY	<i>UNIVERSITY</i>	<i>RESEARCH</i>	Cyprus
6	Karde AS	KARDE	<i>SMALL MEDIUM ENTERPRISE</i>	<i>BUSINESS USER</i>	Norway
7	Frederick Research Center	FRC	<i>RESEARCH ORGANIZATION</i>	<i>RESEARCH</i>	Cyprus

### 3 General consortium structure

The management and coordination of the GUIDed project is performed as described in WP1. The GUIDed project management structure includes:

- **The Coordinator - MAT-** who is the legal entity acting as the intermediary between the partners and the European Commission and is responsible for the administrative and financial (gathering data and reporting to the respective authorities) management of the project.
- **The Technical Manager - UCY -** who is responsible for ensuring that the technical and scientific conduction of work will follow the project plan.
- **The Impact Manager- PLATUS -**who will lead the general dissemination and exploitation actions of the GUIDed project, in order to maximize the exploitation potentials for project results.
- **The User Research Manager - MAT-** who is responsible for the successful conduction of field trials as defined in the Work Plan.
- **Work Package Leader (WPL)** is a person leading a WP as laid out in the work plan and is responsible for stimulating and monitoring the performance of WP. WPL coordinates the production of deliverables and scientific papers related to his/her WP in collaboration with the Impact Manager, ensures the timely accomplishment of technical objectives and the delivery of deliverables of his WP. WPL is responsible for reporting to the Coordinator on the progress and the main highlights of the completed work, major opportunities and threats according to the Work Plan as well as flagging insufficient quality or unacceptable delays.
- **Executive Board (EB)** which is the supervisory body for the Project execution and decision making body in all relevant Project matters. The EB consists of one nominate representative of each partner with due authorisation to discuss, negotiate and agree, provide decisions or recommendations made by the organizations within the context of their responsibilities.
- **Advisory Board (AB)** which will be established including external experts with experience in Geropsychology, Cognitive Psychology, commercialization of health products, silver economy and older adults. The members of the advisory board will supervise and be engaged throughout project progress.

- **Ethics Board** including experts with experience in ethical standards which will serve as a guide and evaluator of the steps employed to comply with relevant criteria.

All project roles, responsibilities of partners and tasks are valid as described in the Description of Work and the Consortium Agreement signed by all partners. General information on each project role and consortium body are provided in the following section.

## 3.1 Project Coordinator

### 3.1.1 Rights and Obligations

The Project Coordinator is **Materia-Agecare (Cyprus) Ltd.** The Project Coordinator is the single point of contact between the Ambient Assisted Living (AAL) Programme Central management Unit (CMU) and the Consortium.

### 3.1.2 Responsibilities of the Project Coordinator

The Project Coordinator is responsible for the following tasks and functions:

- overall management of the Project,
- chairing the Executive Board,
- preparation of the meetings and decisions of the Executive Board.
- timely collection and, with the support of the Executive Board, preparation of statements, from the Parties for submission to the AAL CMU,
- ensuring the prompt delivery of all hardware, software and data identified as deliverable items as requested by the AAL CMU for reviews,
- management of all aspects related to Third Parties and the Consortium.
- management of the financial tasks and reporting to the AAL CMU
- maintenance of details of approvals given in relation to material that is subject to Controlled Licence Terms

If the Coordinator fails in their coordination tasks, the Executive Board may propose to the AAL CMU to change the Coordinator.

In general, the Project Coordinator has:

- I. *No power of Representation*

The Coordinator shall not be entitled to act or to make legally binding declarations on behalf of any other Party, except if so stipulated in the Consortium Agreement.

- II. *Entitlements related to Deliverable Submission as follows:*

If one or more of the Parties are late in submitting Project Deliverables, the Coordinator may submit the other Parties' Project Deliverables to the AAL CMU. Furthermore, the Project Coordinator can inform the AAL CMU if a Party is late in submitting or refuses to provide Deliverables as defined in the Consortium Agreement.

## 3.2 Technical Manager

### 3.2.1 Rights and Obligation

The **Technical Manager, University of Cyprus-UCY**, is responsible to ensure that the technical/scientific work packages WP3 and WP4 are performed in accordance to the plan and timeline set out in this project. UCY will monitor the timely execution of WPs activities in collaboration with the WP leaders and by following the intellectual outputs defined in the form of deliverables and milestones in the project. Moreover, UCY will assist the coordinator in the management of the remaining WPs, namely WP2 and WP5.

### 3.2.2 Responsibilities

The Technical Manager is responsible for the following tasks and functions:

- Collaboration of the respective WP leaders for the coordination of the technical development tasks of GUIDed including specification, implementation, software testing and evaluation and support for the field trials
- Reporting and monitoring of the progress of Work Packages 3 and 4 covering technical issues to the Executive Board and the Project Coordinator
- Defining and establishing procedures for the system development
- Calling frequent technical meetings and conference calls with all technical partners in coordination with the respective WP leaders

## 3.3 User Research Manager

### 3.3.1 Rights and Obligation

**Materia -Agecare (Cyprus) Ltd (MAT)** assumes the role of the User Research Manager who shall act as coordination and communication point for the trial sites. The User Research Manager shall coordinate the reporting of progress to the Coordinator and the Executive Board. The User Research Manager shall assist the trial sites by supporting them from a methodological-medical perspective and by providing information and guidelines to generate comparable trial results. Therefore, the User Research Manager shall have the right to demand from the Sites information about their inclusion rates and their successful conduction of field trials as defined in the Work Plan. In strong cooperation with the Ethics Committee, the User Research Manager supports the Sites to assure the correctness of the trials and the rights of participating volunteers.

### 3.3.2 Responsibilities

The User Research Manager is responsible for the seamless execution of the following tasks and functions:

- Coordination of all tasks devoted to the GUIDed trials including planning, realisation and data assessment of the activities devoted to the evaluation of prototypes in accordance with involved WP and Task Leaders
- Reporting and monitoring of the progress of accordant tasks to the Executive Board and the Project Coordinator
- Defining trials protocols and standard procedures for the trials

- Presenting trials results to the technical partners in the form of suggestions for improvements
- Managing the translation of the texts of the prototypes

### 3.4 Impact Manager

#### 3.4.1 Rights and Obligation

**Platus- Platus Learning Systems GmbH** assumes the role of the Impact Manager. The Impact Manager is responsible for the planning, organization and implementation of dissemination and commercialization activities with the ultimate goal to maximize project impact and market penetration potential.

#### 3.4.2 Responsibilities

The Impact Manager is responsible for the seamless execution of the following tasks and functions:

- Meet regularly with representative of each partner to define, coordinate and update a collaborative exploitation and dissemination plan
- Identification of conferences, magazines and journals for dissemination
- Coordination of dissemination activities like a brochure or the project web site
- Intellectual Property Rights (IPR) definition and data maintenance and harmonization of the partners' policies
- Evaluation and coordination of the effort required to develop marketable products
- Planning of exploitation strategies and joint initiatives
- Release of a business plan covering one or more preferred solutions concerning the partnership in the exploitation, the organization, the royalties, the market estimates and risks

### 3.5 Work Package Leaders

The table below describes WPLs and their respective WP

*Table 2. Work Packages and Leaders*

WP No	WP Title	WP Leader
1	Project Management and Scientific Coordination	MAT
2	End-Users Involvement and Experimental Evaluation	MAT
3	Smart Kit Assembly and Platform Development	KI-I
4	Scenarios and Demonstrators	KARDE
5	Dissemination, Outreach Activities and Commercialisation Plan	PLATUS

### 3.5.1 Rights and Obligation

The Work Package Leader (WPL) of each Work Package will be nominated by the Party leading the WP. The WPL's main purpose is to stimulate and monitor the performance of the WP.

### 3.5.2 Responsibilities

The responsibilities of the WPLs shall include:

- Coordination of production of deliverables
- Timely accomplishment of the technical objectives
- Reporting of progress, overview of main highlights, major opportunities and threats to the Project Coordinator
- Flagging insufficient quality or unacceptable delays to the Project Coordinator
- Proposals to the Coordinator for decisions in the EB.

### 3.5.3 General planning

- Each WP leader is responsible to have a practical plan of his/her WP and communicate it to the coordinator.
- When a WP links directly to another WP in the project, it is necessary to synchronize the planning of the two. Even though there might be differences regarding the planning details of the separate WPs, this synchronisation should facilitate the harmonisation of schedules. The process of synchronisation involves all WP leaders concerned and may be initiated by the coordinator.

## 3.6 Task Leaders

The task is the unit of each WP. The Task Leader (TL) is responsible for the timely and proper implementation of all activities described in their respective tasks including the attainment of related project milestones and the production of related deliverables. Except for the TL all participants in a task are responsible to contribute and provide their feedback led by the TL.

### 3.6.1 General planning

- Each TL leader is responsible to have a practical plan of his/her task and communicate it to the coordinator.
- When a task links directly to another task in the project, it is necessary to synchronize the planning of the two. Even though there might be differences regarding the planning details of the separate tasks, this synchronisation should facilitate the harmonisation of schedules. The process of synchronisation involves all task leaders concerned and may be initiated by the respective WPLs involved.

Table 3 includes a list of all project deliverables (N=18) in a timeline order, the tasks and WP they are associated with as well as the respective task leaders and contributing partners.

*Table 3. List of project deliverables*

WP	Task	Deliverable	Type <sup>1</sup>	Leader	Part	Due
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<sup>1</sup> R=Report, Q=Questionnaire, D= Document, S= Software, P=Public, Re=Restricted

1	1.1: Project Management	D1.1: Project Management Handbook	R, P	MAT	ALL	M2
1	1.2: Scientific Coordination	Q1.2: Quality Assurance Plan	R, P	UCY	ALL	M2
2	2.1: End-Users Recruitment and Demand Analysis	D2.1: Report on user recruitment procedures, and older adults demands analysis	R, Re	KARDE	ALL	M4
3	3.1: Platform Specification and Architecture	D3.1: Report on platform specification and architecture	R, P	KI-I	UCY, KARDE, HARPO, FRC, PLATUS	M4
5	5.4. IPR management	D5.3: IPR management plan	D, Re	PLATUS	ALL	M6
1	1.1: Project Management & 1.2: Scientific Coordination	D1.3a: Calendar year report	R, Re	MAT & UCY	ALL	M12
1	1.1: Project Management & 1.2: Scientific Coordination	D1.4: Mid-term review questionnaire	Q, Re	MAT & UCY	ALL	M15
5	5.1. Dissemination Strategy and Implementation & 5.2. Exploitation Plan and Implementation	D5.1a: Intermediate and Final Dissemination and Exploitation Plan and Implementation	R, P	KARDE & PLATUS	ALL	M15
5	5.3. Commercialization and Sustainability	D5.2a: Intermediate Business plan and business model	R, Re	PLATUS	MAT, HARPO, KARDE	M15
2	2.2: Experimental Evaluation and User Feedback (Testing Phase 1)	D2.2: Report on platform's experimental evaluation and feedback activities (Testing Phase 1)	R, P	MAT	PLATUS, HARPO, KARDE	M18
3	3.2: Smart Kit Assembly, 3.3: Smart Platform Development, 3.4: Platform Integration	D3.2: GUIDed platform prototype.	S, Re	UCY & HARPO	KI-I, KARDE, FRC, HARPO, PLATUS	M18
1	1.1: Project Management & 1.2: Scientific Coordination	D1.3b: Calendar year report	R, Re	MAT & UCY	ALL	M24
1	1.1: Project Management & 1.2: Scientific Coordination	D1.5: Final Report	R, Re	MAT & UCY	ALL	M30

2	2.3: Ethics, security, privacy and reliability of the platform	D2.3: Report on ethical issues	R, Re	MAT	ALL	M30
3	3.5: Platform Optimisation	D3.3: GUIDed platform product.	S, Re	KI-I	UCY, HARPO, FRC, PLATUS	M30
4	4.1: Definition and Analysis of the Users' Scenarios, 4.2: Product Setup, GUIDed Learning and Demonstrators Implementation (Testing Phase 2)	D4.1: Final Report on the Demonstrators Implementation	R, P	PLATUS & KARDE	ALL	M30
5	5.1. Dissemination Strategy and Implementation & 5.2. Exploitation Plan and Implementation	D5.1b: Final Dissemination and Exploitation Plan and Implementation	R, P	KARDE & PLATUS	ALL	M30
5	5.3. Commercialization and Sustainability	D5.2b: Final Business plan and business model	R, Re	PLATUS	MAT, HARPO, KARDE	M30

### 3.6.2 Responsibilities and role of Project Bodies

The Executive Board shall be responsible for the development, extrapolation and harmonisation of the Work Plan in line with the Consortium Agreement, and shall propose specific procedures in decision making relating these issues in accordance with the laid-out principles. The Project Coordinator has to inform the Executive Board about any changed proposals for activities to be confirmed and approved.

The Advisory Board will be established including external experts with experience in Geropsychology, Cognitive Psychology, commercialization of health products, silver economy and older adults. The members of the AB will supervise and be engaged throughout project progress.

The Ethics Board, consisting of an appointed person from each partner, will observe all ethical issues, especially all aspects of the dignity, autonomy and values (human and professional) of the primary and secondary end users. Furthermore, the ethical board will observe the ethical issues concerning the relationship between all end user groups and the project, including informal carers.

## 4 Communication

This section presents the different physical and electronic means of communication among the partners.

## 4.1 Forms of communication

### 4.1.1 Meetings

Plenary meeting is a meeting where all members of a consortium participate. Any member of the Consortium:

- Should be present or represented at any meeting
- May appoint a substitute or a proxy to attend and vote at any meeting and
- Shall participate in a cooperative manner in the meetings. All members must dully inform the Project Coordinator and the Executive Board if they cannot attend a meeting due to a force majeure event and read the meeting minutes circulated by the Project Coordinator or other responsible partner.

Table 4 describes all the planned remote and physical meetings of the consortium for the first project year (M1-M12). The planned meetings are in accordance with the Description of Work and the Consortium Agreement. The table will be updated throughout the project course for the second and the third project year.

*Table 4. Planned project meetings (Project Year 1)*

Meeting title	Type of Meeting	Attendees	When <sup>2</sup>
Kick-off meeting	Physical meeting, Nicosia, Cyprus	All consortium partners	28-29/01/2020
Monthly meeting at 9 a.m CET	Skype Meeting	All consortium partners	25/02/2020
			31/03/2020
			28/04/2020
			26/05/2020
			30/06/2020
			28/07/2020
			25/08/2020
			29/09/2020
			27/10/2020
			24/11/2020
29/12/2020			
Plenary meeting	Physical meeting, Oslo Norway	All Consortium partners	09-10/06/2020

With regards to the planned meetings, it is important to note the following:

<sup>2</sup> Dates and times might vary depending on partners' availability, national holidays or unexpected circumstances

1. For all the physical meetings the hosting partner will be responsible for taking the meeting notes.
2. A final agenda should be ready 14 calendar days before the meeting or 10 calendar days before in case of an extraordinary meeting.
3. Any partner may add items to the original agenda by written notification up to 5 calendar days before the meeting.
4. The draft minutes shall be sent to all Members within 5 calendar days counting from the date on which the meeting was held. The minutes shall be considered as accepted if, within 5 calendar days from sending, no Member has sent an objection in writing to the chairperson with respect to the accuracy of the draft of the minutes.
5. The final minutes should be distributed between the partners 12 days after the end of the meeting (at most).

#### *4.1.1.1 Physical meetings*

Physical meetings among all partners will be held throughout the duration of the project on a regular basis, but not more frequently than two times per year in order to minimise the project's ecological footprint. It is planned to hold two physical meetings per project year in the countries of the partners involved in the Consortium (Austria, Cyprus, Norway, Poland), or other countries if justified by project objectives, or Brussels, Belgium.

#### *4.1.1.2 Remote meetings*

For all the remote consortium meetings there will be a chair, a minutes' secretary and an agenda. As agreed between the partners, all the remote/internet meetings will be made by utilising [Microsoft Skype tool](#). The coordinator organization is responsible for noting down the minutes and circulating them to all partners' for feedback.

The agenda for the meetings will be structured by the coordinator. In case the meeting does not have the necessary notice time upfront, the notice time for the agenda and the contributions might be shorter as well. A monthly Skype meeting will be held every last Tuesday of each month according to Table 4. If a meeting date coincides with an international holiday or cannot be held in the pre-defined date due to any other reason it will be transferred on the closest available date for all partners.

It is noted that smaller working groups, i.e., technical partners or end-user organizations can/will hold separate meetings according to project needs, to ensure optimal communication and attainment of their task's goals. Each team meeting is to appoint a person to take the meeting minutes and circulate them to all project partners within 5 working days from the day of the meeting.

All partners' contact details and emails are stored in an [Excel spreadsheet](#) on [Google Drive](#) shared with all partner organizations and their legally appointed members (see Fig. 1). These contact details are used to ensure proper communication with partners. Hence, each partner is responsible to check that their members' details are updated at regular intervals.



My Drive > ... > WPs working do

Name ↑



Physical meetings



Teleconferences



Partners emails and Skype IDs

Figure 1. Partners' contact details spreadsheet

#### 4.1.1.3 Template, file name and contents for minutes

A template for the meetings' agenda and minutes is provided on the following [link](#) on the template section of the Google Drive and also in Annex A of the present document. This will make meetings' outputs and decisions easy to track and implement.

In order to easily identify meeting records, the name of each document will be coded as described below.

#### **Example of code generator**

*Date: year, month, day\_subject, i.e. 20200908\_KOM\_minutes*

*Example of date extraction: September 8th 2020: 20200908*

*Name/subject should be short, descriptive and easy to identify long after the meeting has taken place:*

*Example: 3<sup>rd</sup>\_Plenary\_meeting*

#### 4.1.2 Email communication

In order to avoid unnecessary information load to project partners, email communication should be as targeted as possible.. Mail to groups should be sent only when needed and to the smallest group or sub-group needed. In this way, the impact will be stronger and time spent on communications will be more efficient. The Project Coordinator has created a mailing list [guided-aal@materia.com.cy](mailto:guided-aal@materia.com.cy) which is under Materia Group's business account in [Google Suite](#). The mailing list contains all members of the GUIDed project as appointed by their organizations and according to the contact details mentioned in the respective Excel spreadsheet (Fig.1). It is recommended that all partners update their contact details and emails on the excel file in order to make sure that they are included in all correspondence. It is also recommended that any issue in receiving or sending emails should be communicated to the coordinator as soon as it is identified. Each partner organization has the responsibility inform the coordinator about any employee wishing to withdraw or join the GUIDed team and update them on their new employees' contact details or request the removal of their old employees' details for data protection issues. It is recommended that all mails to the mailing list have a similar subject name for easy identification between other projects and tasks of the

partner organizations following the format: *[GUIDed] Main topic, example: [GUIDed] Review of D1.1.*

## 5 Protocols for material production and distribution

### 5.1 Production of deliverables

The deliverables are the official products of the project subject to deadlines and protocols for preparation. The deliverables should be produced by the responsible TL. The TL is responsible to coordinate the efforts and ask the contributing partners for input through the preparation of their deliverables. TLs and contributing partners for each deliverable are described in the Description of Work and Table 3 of the present document.

Partners are to use a specific template for deliverables, provided in the common archive for documents by the Project Coordinator and described in detail in this section. The first page of the deliverable template includes the logo of the AAL programme, the logo of the GUIDed project, AAL JP project number, project acronym, full project title, document name and properties, including Deliverable ID, Status, Dissemination Level, Due date of deliverable, Actual submission date, Work Package, Organization name of lead contractor for this deliverable, Author(s) and Contributing Partners. Furthermore, the first page contains details and logos of the National Funding Authorities.

Each document should have the following sections: Version History, List of Tables, List of Figures, List of Abbreviations, Executive summary, Introduction, Main content, Conclusions, References and Appendix.

The Version History should describe in brief the modifications and contributions provided on each deliverable from its draft till its final version release. The history should include the date, the organization and the type of contribution provided, in brief. The List of Tables and List of Figures should be made by using the automatic feature provided by Microsoft Word. The text of the document must be written in an easily readable format and thus, the following type of input is suggested for consistency. The suggested language is English U.K.

*Table 5. Deliverable template: Format suggestions according to text type*

Type	Format
Main Text	Arial, 11, Normal Style, 1.15 line spacing, aligned to the left
Heading 1	Arial, 16 pt, bold blue
Heading 2	Arial, 14 pt, bold blue
Heading 3	Arial, 12 pt, blue
Heading 4	Arial, 11pt, blue, italics

Any widely known writing style (American Psychological Association – APA style, Modern Language Association – MLA style, etc.) is acceptable for providing in-text citations and references as long as it is used consistently and correctly throughout the document. The RGB (R – red, G – green, B - blue) model values of blue color used in various parts of the deliverable template are R: 32, G: 133, B: 116. The deliverable template can be accessed on the following [link](#).

### 5.1.1 Procedure

The TL is responsible for creating and editing the contents and presentation of the draft version and the final version of the deliverable. They are also responsible for announcing any upcoming document, its notice time and the deadline for submission.

In general, each TL is responsible for the effective time-management and coordination of contribution partners in order to deliver the final deliverable on time. However, it is suggested that the TLs should start the preparations for the production of their deliverable at least one month before its official submission deadline. The deliverable production and fine-tuning from its draft to its final phase should follow the procedure outlined in Fig. 2.

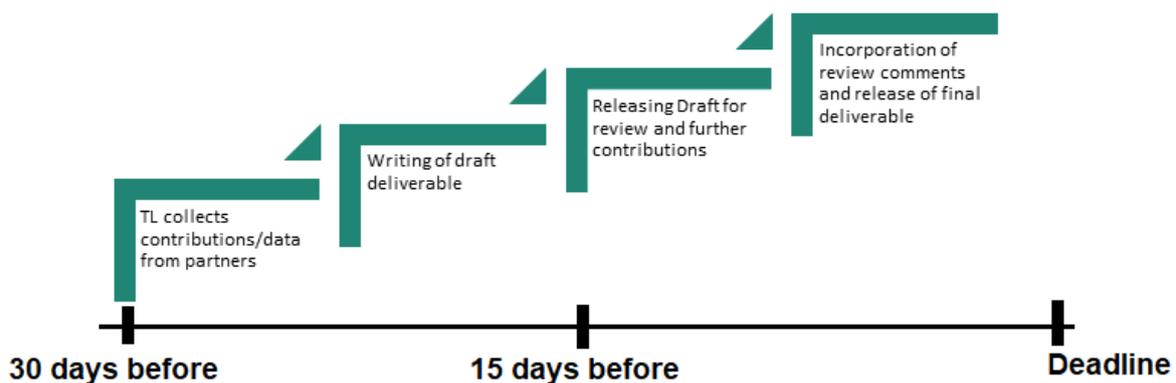


Figure 2. Phases of deliverable production

In detail, the following procedure is suggested:

1. TL creates the skeleton of the deliverable
2. TL asks for comments/contribution from partners involved in the task
3. TL releases first deliverable draft for feedback and review
4. TL incorporates all feedback
5. TL releases the final version of the deliverable and notifies the coordinator to submit it to the AAL CMU
6. The Coordinator submits the deliverable
7. The Coordinator uploads the deliverable in the shared archive (Google Drive)

All partners who contribute to each task according to the Description of Work and Table 3 of the present document are obliged to review the respective deliverables of the task. However, it is recommended that all consortium partners should read the deliverables and other documents circulated within the consortium in order to be informed about products and information that impacts them as Consortium members. To this end, adequate time needs to be given in advance in order to enable everyone to review the documents. In case, for unexpected reasons a deliverable is released later than expected for review contributing partners will use the remaining time to provide their review respecting the contractual deadlines.

## 5.2 Production of digital files

In order to ensure efficient and comprehensive exchange of digital information, all partners should utilise the list of the tools/software below. This will help avoid any integration issues of different tools/software.

- Microsoft Word (file format .doc, .docx, etc.)
- Microsoft Excel (file format .xlsx, .csv, etc.)
- Microsoft PowerPoint (file format .ppt, .pptx)
- Open Office (file format .odt, .odx, etc.)
- PDF files
- JPG files
- PND files
- HTML files
- Popular video formats, MP4, MPEG, AVI, etc.

## 5.3 Presentations

Presentations should be as clear as possible in order to facilitate all users attending the main points of the speaker. The template for the presentations can be found in the following [link](#) on Google Drive. The first slide of the template contains the logo of the AAL programme and the logo of the GUIDed project, the AAL JP project number and acronym, the event where the presentation takes place, the name(s) of the speaker(s) and the title of the presentation.

Some general recommendations on presentations to facilitate the attendee are:

- 1) Use the 5/5/5 rule: include maximum five words per line, five lines of text per slide and five consequent heavy-text slides.
- 2) Use animations, sound and videos sparingly as they are heavy to load, sometimes tiring for the audience and might cause unexpected errors to your presentation.
- 3) Use general fonts such as Arial or Times New Roman.
- 4) Use text at a 28 or 32 point size for main text and a 36 to 44 point size for titles.

## 5.4 Other documents and material

Any other types of documents circulated among consortium members for internal organizing and communication should be provided in a clear, eligible and understandable format. Documents citing or including other partners' work and IP should be communicated in a timely and efficient manner with them in order to avoid any conflicts and support collaborative efforts.

### 5.4.1 Publications and IPR

To make sure no IPR sensitive information is published, all publications (articles, papers etc.) should be uploaded to Google Drive upon creation, followed by an informative email to the GUIDed mailing list. It is then the responsibility of the beneficiaries to notify the submitting partner as soon as possible if any changes are needed. If no notification has been received within two weeks, it is assumed that the partners have accepted the document and will be published as planned. Final versions of publications should be uploaded to Google Drive in the publications folder.

## 5.5 Naming convention for GUIDed documents

In order to keep track of work and easily identify the documents circulated among consortium members, each document will be coded. The code should be included in:

- a. the title of the document,
- b. the first page of the document (information overview)
- c. at the bottom of each page as a footer.

The guidelines below apply to all documents (i.e final deliverables, draft deliverables and other documents).

To generate the name of a file, follow the guide below:

- When writing a shared document
  - [GUIDed] Title\_of\_the\_doc\_VNo\_entity\_short-name
    - *i.e.*, [GUIDed]Contribution\_to\_handbook\_V1\_MAT
- If circulating a draft deliverable version
  - [GUIDed] Doc\_Number\_Title\_of\_the\_doc DRAFT
    - E.g., [GUIDed]D1.1\_Project\_Management\_Handbook\_DRAFT
- If circulating the final version of a deliverable
  - [GUIDed] Doc\_Number\_Title\_of\_the\_doc FINAL
    - E.g., [GUIDed]D1.1\_Project\_Management\_Handbook\_FINAL
- If providing feedback on a deliverable
  - [GUIDed] Doc\_Number\_Title\_of\_the\_doc\_entity\_short-name
    - E.g., [GUIDed]D1.1\_Project\_Management\_Handbook\_FINAL\_MAT

## 6 The Google Drive server

The Google Drive server is used for storage of all shared documents of the GUIDed project. The main folder, named *[GUIDed\_AAL JP\_2019] Shared folder* and all subfolders are accessible to all consortium partners and the members they appointed according to the contact details provided in the respective Excel spreadsheet (Fig. 1). Hence, it is recommended that all partner organizations update the contact details of their employees when needed to ensure optimal access on the Drive.

The Google Drive folder is structured hierarchically by categories in folders. As seen in Fig. 3 the categories include:

- a. Administrative documents (such as the Description of Work and the Consortium Agreement)
- b. Deliverables final versions, which contains the final versions of the deliverables submitted to the AAL CMU
- c. Financials, containing financial information of the project for all consortium partners
- d. Materials and Templates, which contains logos, flyers and templates (including all the templates referenced in the present document) and
- e. WPs working documents, which contains
  - all draft internal documents and their versions which partners created in the past or are still working on before reaching their final version
  - all documentation unrelated to the previously described folders which falls under the tasks and activities of the relevant WP.



My Drive > ... > GUIDed > [GUIDed\_AAL JP\_2019] Shared folder

Name ↑	Owner	Last modified	File size
 Administrative		Jan 2, 2020	–
 Deliverables final versions		Jan 23, 2020	–
 Financials		Jan 2, 2020	–
 Materials and Templates		Jan 2, 2020	–
 WPs working documents		Jan 23, 2020	–

Figure 3. Organization of the Google Drive shared folder

Partners can access the Google Drive by signing in to their Google Account or by following the link to the Google Drive sent by the Project Coordinator. All partners experiencing any kind of difficulties accessing or editing information on the Google Drive should inform the Project Coordinator in order for the issue to be resolved. Partners can choose to add the GUIDed shared folder to their Google Drive space by right-clicking the *[GUIDed\_AAL JP\_2019] Shared folder* in the “Shared with me” tab and choosing the respective option (Fig. 4).

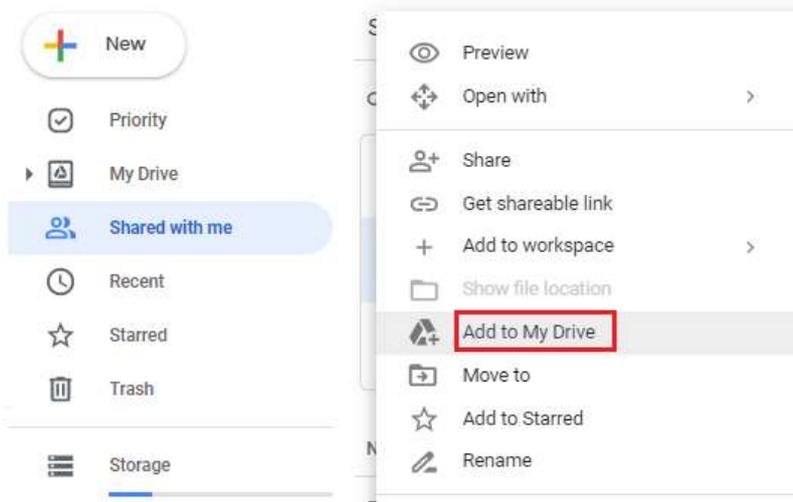


Figure 4. Add to My Drive option

Further tips for using the Google Drive:

- Double-click on folder or documents to open
- Drag documents into the folder you want to upload them to
- Download and share documents with others by right-clicking on them
- You can add suggestions to an online text document by clicking the “suggesting” mode on the top right corner
- Saving new revisions:
  - You may create a new version of a document under version control
  - If you edit a text document under version control directly on the server, a new version is created automatically. Its version information should be completed in order to inform the members of the workspace.
  - You explicitly create a new version of a document under version control as follows.
    - The ‘Revise’ form lets you upload a file as the new version. The form further offers default values for the new version number and the version state. These values may be modified, e.g., an out-of-sequence version number may indicate that the current version is a significant change of the preceding version.
    - Entering instructive information in the field ‘Changes made in version version-number’ will help the members of the workspace understand the version history and later on to find a specific older version.

## 7 Risk assessment and management plan

For the purpose of effectively managing the risks and ensuring the quality, the Consortium has designed strict quality assurance processes for all the different stages in the project (e.g. the technical and scientific tasks and the business tasks). These processes will be updated throughout the project lifecycle as new risks could be identified at any time with the objective being to decrease the probability and impact of events adverse to the project. Examples of such potential risks already identified in the DoW include: illness of personnel, technical obstacles, delay of milestone deliveries and the withdrawal of consortium members. Any potential risks and the appropriate risk mitigation measures to be implemented are elaborated in D1.2 Quality Assurance Plan.

## 8 Conclusions

The present document aims to establish the protocol and procedures for the management, monitoring and implementation of the GUIDed project, detailing aspects such as partner roles and obligations, communication, document storage and sharing and production of project outputs.

All consortium members are responsible for consulting the present document in regular intervals to ensure the implementation of a common strategy and procedures along the duration of the project.

The present Project Management Handbook is a dynamic document and will be adapted to new updates, information and collaborative decisions taken by project partners which cause alterations in any of its contents in order to reflect the current practices.