

DELIVERABLE

D8.1 Quality Handbook

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Statement of Originality

This Deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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Glossary of used terms

Acronym	Definition
CA	Consortium Agreement
C/O	Care Of
D	Deliverable
DESCA	Development of a Simplified Consortium Agreement
DoA	Description of the Action
EAB	External Advisory Board
EC	European Commission
EU	European Union
GA	General Assembly
H2020	Horizon 2020
KOM	Kick Off Meeting
IM	Innovation Manager
MST	Management Support Team
PC	Project Coordinator
PM	Project Manager
PSC	Project's Steering Committee
ToC	Table of Contents
WP	Work Package
WPL	Work Package Leader

Executive Summary

This deliverable describes easyRights's quality strategy to all Consortium members. It outlines the project's organisational structure and the decision making bodies and voting rules within project meetings, including the conflict management procedures. It summarizes the project's work plan, which has been extensively described in the DoA, the schedule of tasks, deliveries and milestones, the IPR management principles and rules, and the partners' roles and responsibilities in the creation of contents. It outlines the managerial control, record keeping, and periodic reporting mechanisms. It introduces the reader to the selected document repository and communication platforms, Basecamp and Google Drive. Finally, the document presents the process of preparation, review and approval of deliverables, which will be adopted all along the project.

1. Introduction

The D8.1 Quality Handbook provides a coherent foundation for administering the easyRights project in order to ensure dependable and straightforward project management and work plan implementation. It contains the necessary information such as partner data, planning procedures, quality assurance procedures and risk management to run the project on a day to day basis. This deliverable defines project management procedures and supporting material for the consortium members.

EasyRights Task 8.1 (Managerial Guidelines), coordinated by POLIMI, covers all the activities that are required for the daily operation of the project. This Quality Handbook, drafted by the Project Coordinator at the end of month 3 and shared with the appointed reviewers, follows a principle of parsimony, avoiding as far as possible the repetition of contents already provided by other available sources, the DoA and the Consortium Agreement (CA).

The key project management guidelines have been outlined by POLIMI to the whole partnership during the kick-off meeting held in Brussels on 7-8-9 January 2020 and are now summarized in this document. Most of them simply mirror the contents of the DoA and of the CA, without any change – notably in the following chapters 2, 3 and 4.

Task 8.1 also includes the set-up and maintenance, by POLIMI, of two web based tools for internal communication, electronic document repository (archival), scheduling and monitoring of the project's progress in terms of deliverables, activities, milestones, task completion and use of resources. These two service tools/platforms are identified as Google drive and Basecamp, the key aspects of them are summarized herein (see chapter 5).

Finally, Task 8.1 includes an arrangement of the internal review and approval process for all project Deliverables to verify consistency with the work plan tasks and safeguard their quality. This process is described in this document (see chapter 6) and includes the assignment of review responsibilities for the deliverables expiring until project month 12 as done during the Brussels KOM in the presence of all partners.

2. Governance structure

2.1 General structure and decision making bodies

The management and organizational structure of the Consortium comprises the following Consortium Bodies:

- General Assembly (GA), composed of one representative per partner
- Project Coordinator (PC), supported by the Management Support Team (MST)
- Work Package Leaders (WPL), forming the Project's Steering Committee (PSC)
- An Innovation Manager (IM)
- An External Advisory Board (EAB)

2.1.1 General Assembly (GA)

The GA is the highest level of management and the ultimate decision-making body. The GA will comprise the coordinator and a representative from each partner who will possess the necessary authority to commit their organizations to the decisions of the GA. The majority of the partners within the consortium have substantial EU project experience, both as partners and as project coordinators.

The GA will take high level, formal decisions to obtain consensus within the easyRights consortium. As such, the GA will agree on changes to budget distribution, make decisions regarding acceptance of new partners as well as potential exclusion of partners and make decisions on any premature completion or termination of the action or parts hereof. In case that a decision will have to be made through voting, each partner will have one vote. If consensus by a quorum of 2/3 of GA members cannot be reached, the coordinator will hold the deciding vote. GA meetings will be held at least every 6 months. Tasks and responsibilities of GA includes:

- Responsible for the overall work plan including technical, strategic and management decisions of the project
- Agreeing on strategic direction of easyRights including budgetary changes
- Supporting the coordinator in fulfilling all obligations towards the European Commission
- Reviewing and resolving major difficulties in the project and to decide on strategic changes
- Make final decisions on potential IPR issues

2.1.2 Project Coordinator (PC)

The Project Coordinator Prof. Grazia Concilio (POLIMI), will have full responsibility towards the EC for achieving the contractual results as well as for overall administrative project management. The role of the coordinator is also to ensure a sufficient scientific quality by coordinating collaboration between the individual partners and individual work packages.

The coordinator has one vote in the GA and PSC. In case of an equal number of votes, the coordinator's vote will be the deciding one. The coordinator has the mandate to act as the consortium representative and make decisions on behalf of the consortium in line with the work outlined in the DoA, the CA and the decisions made by the GA and/or PSC. Tasks and responsibilities of GA includes:

- Maintaining the management structure and project communication to ensure that the S&T objectives and milestones are met according to the expected time schedule and ensure the implementation of all project administration tasks
- Acting as the intermediary between the parties and the EC
- Monitoring that all partners comply with their contractual obligations
- Risk management: monitoring and implementation of the needed contingency strategies
- Ensuring that all partners comply with the publication procedure

2.1.3 Work Package Leaders (WPL) and Project's Steering Committee (PSC)

The WPL are responsible for the execution of the scientific, technological, dissemination and exploitation activities in the respective WPs and coordinate the partners involved in that WP. All WPLs have been selected on the basis of their substantial experience with research coordination and EU projects. The coordinator has already established good working relations with the WPLs.

Taken together, the WPLs form the Project's Steering Committee (PSC). This will meet on a monthly basis through audio/video conference and at least on a biannual basis in person. The PSC is in charge of implementing the project as defined in the DoA and to make the necessary decisions to ensure that work is progressing according to the contractual plan and budget. In case that a decision will have to be made through voting, each WPL will have one vote. If consensus by a quorum of 2/3 of PSC members cannot be reached, the coordinator will hold the deciding vote. Tasks and responsibilities of WPL and PSC are:

- Daily management of the WPs
- Coordinating the work of the task leaders and other consortium members who contribute to the tasks
- Assuring quality of the preparation of the WP related deliverables
- Coordinating the internal review process of contractual deliverables
- Monitoring and harmonizing activities between different WPs
- Delivering inputs to WP-specific and general purpose progress reports
- Conducting regular meetings with task leaders and subsequently updating the coordinator

During the KOF meeting in Brussels, the WPLs roles have been associated to the following names:

Grazia Concilio (WP1 and WP8), Sandra Garcia Torres (WP2), Nicola Morelli (WP3), Inna Tolskaya (WP4), Lydia Roessl (WP5), Anna Koronioti (WP6), Susie Ruston McAleer (WP7).

2.1.4 Management Support Team (MST)

As coordinator, POLIMI bears the overall scientific, technical administrative and financial management responsibilities of the project. The MST will assist and facilitate the work of the GA, PSC and PC for executing the decisions made as well as the daily management of easyRights. The MST will primarily consist of a team of experienced administrative project managers, mostly hired at IED and BIC, who will cooperate with the PC with relevant support functions in all key tasks (legal, dissemination, exploitation, innovation and IPR, financial management etc.) when necessary for the project and/or on an “ad hoc” basis.

The MST will take together with the PC the decisions that are necessary to coordinate and implement management activities in relation to the execution of the project. The MST will meet with the PC at least once a month (online or in-person meetings) or more frequently if needed. Tasks and responsibilities of MST include:

- Support the coordinator in achieving the contracted results including project reporting and accounting
- Management of financial issues and overseeing of project budget with proposal of budget adjustments or reallocations when necessary and in cooperation with the coordinator
- Preparing the periodic and final reports in cooperation with the coordinator and other relevant contributors
- Follow-up on dissemination and exploitation of results in cooperation with the coordinator
- Day-to-day administrative management, including planning and execution of meetings
- Monitoring of IPR activities and IPR related work together with the coordinator

2.1.5 Innovation Manager (IM)

The Innovation Manager (IM) is appointed by the Project’s Steering Committee and proposed jointly by WP2 and WP3 leaders. The IM drives knowledge exchange and reciprocal learning within and between the pilots; liaises with state of the art research on innovation management and value creation; deals with open data and knowledge management related issues; makes sure that the emerging partnerships and governance agreements are widespread known both within and outside the Consortium.

IM’s tasks include:

- Favouring knowledge exchange and reciprocal learning within and between the pilots
- Liaising with state of the art research on innovation management and value creation
- Dealing with open data and knowledge management related issues
- Making sure that the emerging partnerships and governance agreements are widespread known both within and outside the consortium

During the KOF meeting in Brussels, Tasos Vasiliadis from IED was appointed as the easyRights Innovation Manager.

2.1.6 External Advisory Board (EAB)

The External Advisory Board (EAB) is appointed by the Project's Steering Committee and chaired by the Project Coordinator. The EAB shall assist and facilitate the decisions made by the General Assembly. The PC will ensure that a non-disclosure agreement is executed between all Parties and each EAB member. Its terms shall be not less stringent than those stipulated in this Consortium Agreement and it shall be concluded no later than 30 calendar days after their nomination or before any confidential information will be exchanged, whichever date is earlier. The PC assisted by the MST shall write the minutes of the EAB meetings and prepare the implementation of the EAB's suggestions. The EAB members shall be allowed to participate in GA meetings upon invitation but have not any voting rights.

The External Advisory Board (EAB) will give scientific and practical advice and recommendations to the consortium, thus supporting the management of easyRights privacy policy and exploitation planning. The EAB will be an external group of experts with special competencies in innovation and immigration policy and practice.

The current list of EAB members includes the following:

Table1: EAB members (as of March, 2020)

Name	Affiliation
Sanda Martincic	Since 2002 she has been working at the Department of Informatics, University of Rijeka. Currently she is an associate professor and teaches undergraduate, graduate and PhD courses. Her current research interests are in the field of speech recognition, speech synthesis, speech corpora development, spoken dialog systems, natural language processing, complex networks analysis.
Gudrun Biffl	Professor of Economics, Danube University Krems. Head of Department for Migration and Globalisation, Danube University Krems. Dean of the Faculty Business and Globalisation, Danube University Krems (2010-2015). Member of the Statistics Council of the Federal Office of Statistics since 2009; Chair of the Statistics Council since 2015.
Emilio De Capitani	Executive Director of the Fundamental Rights European Experts Group (FREE Group - www.free-group.eu). Contract lecturer at the "L'Orientale" University of Naples and at S. Anna High School in Pisa. Former Secretary (1998-2011) of the Civil Liberties Commission (LIBE) of Parliament European. During his professional activity responsible for institutional relations and legislative coordination at the European Parliament (1985-1998) and the Council Regional of Lombardy (1971-1985).
Peter Scholten	Professor Public Administration, specialized in the Dynamics of Migration and Diversity Policies, at the Erasmus University of Rotterdam. His research focuses on the governance of migration and migration-related diversity, multi-level governance, comparative public policy, and the relationship between knowledge

	and power in the field of migration. Peter is director of IMISCOE, Europe's largest academic research network on migration, integration and social cohesion.
Marieke van Erp	Since September 2017, she leads the Digital Humanities Lab at KNAW Humanities Cluster where we are working on strengthening digital methods in humanities research at Huygen ING, IIH and Meertens Institute. Between October 2009 and September 2017, she was a researcher at Vrije Universiteit Amsterdam, where she worked on various interdisciplinary projects such as NewReader and CLARIAH.

The EAB members will participate to the easyRights consortium's meetings or, when this is not possible, will meet online on a biannual basis during the project. A sum of € 12 000 (excluding overheads) to cover the travel expenses incurred by the EAB members has been included within the travel budget of DUK and POLIMI (in equal parts). The same partners also have added the amount of € 2 000 each to the other direct costs, to make room for small fees to be paid for the EAB members' involvement.

The EAB has no voting rights or decision making capabilities.

2.2 Project meetings

The following face-to-face project meetings are foreseen by the easyRights DoA:

- KOM at the start of the project, actually held in Brussels on January 7-8-9, 2020 at the presence of all project members;
- GA meetings, at least once a year;
- PSC meetings, at least 4 times a year, by audio / video conference;
- Technical consortium meetings, at least 2 times per year;
- WPL meetings, whenever considered necessary for the progress of each WP;
- EAB meetings, at least twice a year, indicatively once in person and once remotely, by audio/video conferencing;
- Review meetings (to be organised by the PC in agreement with the EC Project Officer), respectively after month 12 (first reporting period) and at the end of the project.

In order to obtain maximum efficiency, the various meetings will as much as possible be organised in conjunction with one another, e.g. the GA, PSC, and technical consortium meetings combined. Also, during the KOM meeting in Brussels it was decided to combine internal meetings with project events as for example the hackathon events of WP3. Wherever possible, meetings will take place at the premises of one of the partners. The project will also make extensive use of teleconferencing, including for the organisation of monitoring meetings at regular dates or whenever it will be deemed necessary.

For more details on the meeting's agenda and minutes preparation, notices and decision making mechanisms, the reader is referred to the easyRights CA. The following tables summarizes the information contained therein:

Table 2: Key rules concerning project meetings

	Chairperson	Prior notice (ordinary*/extraordinary**)	Minutes c/o	Quorums
GA meetings	PC	45*/15** calendar days before (new agenda items 14*/7** calendar days before)	PM	7 partners present, 5 votes 2/3 of GA members
PSC meetings	PC	14*/7** calendar days before (new agenda items 2 calendar days before)	PM	2/3 of PSC members
EAB meetings	PC	45*/15** calendar days before	PC/PM	Not significant
Other meetings	Who called it	No prescription	Who called it (no rule)	No quorums

The chairperson of a Consortium Body will prepare and send each Member of that Consortium Body a written (original) agenda no later than the minimum number of days preceding the meeting as indicated below:

Table 3: The minimum number of days preceding the meeting

	Prior sending the agenda
GA meetings	21 calendar days, 5 working days for an extraordinary meeting
PSC meetings	7 calendar days, 2 working days for an extraordinary meeting
EAB meetings	21 calendar days, 5 working days for an extraordinary meeting
Other meetings	21 calendar days, 5 working days for an extraordinary meeting

3. Work plan

The following contents are mostly extracts or summaries from the easyRights DoA, 2019. They are presented here as a useful reference and synthesis. What is new is that Task and Deliverable related responsibilities for the first year are indicated with names of persons in addition to the partners in charge (see subsections 3.2 and 3.3 below). Any variation of the lists presented therein will be reported in future versions of this document.

3.1 Work packages

The work is organised in 9 Work Packages (WP), which in turn consist of tasks and deliverables.

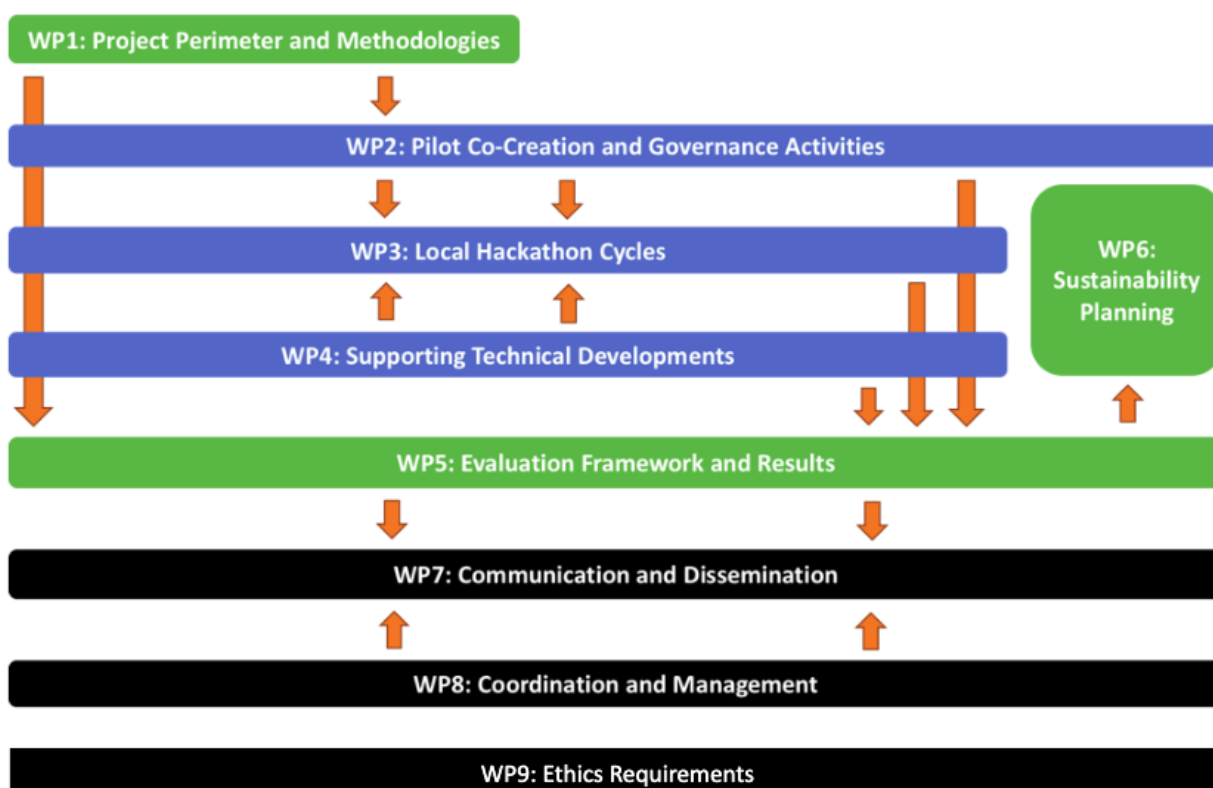


Figure 1: Work Packages overview

The relationship of each work package to other work packages is made explicit in the Description of Action by stating how the actions build on the result of other work packages and how the outputs and deliverables will be used by others. The interrelation between the work packages has also been made explicit via the Gantt chart (see following section 3.2) and the following figure, which gives insight into the overall WP structure and interdependencies between the different WPs.

3.2 Project Planning Gantt Chart

The project planning chart presents, in details, the breakdown of tasks within each work package over the course of the project.

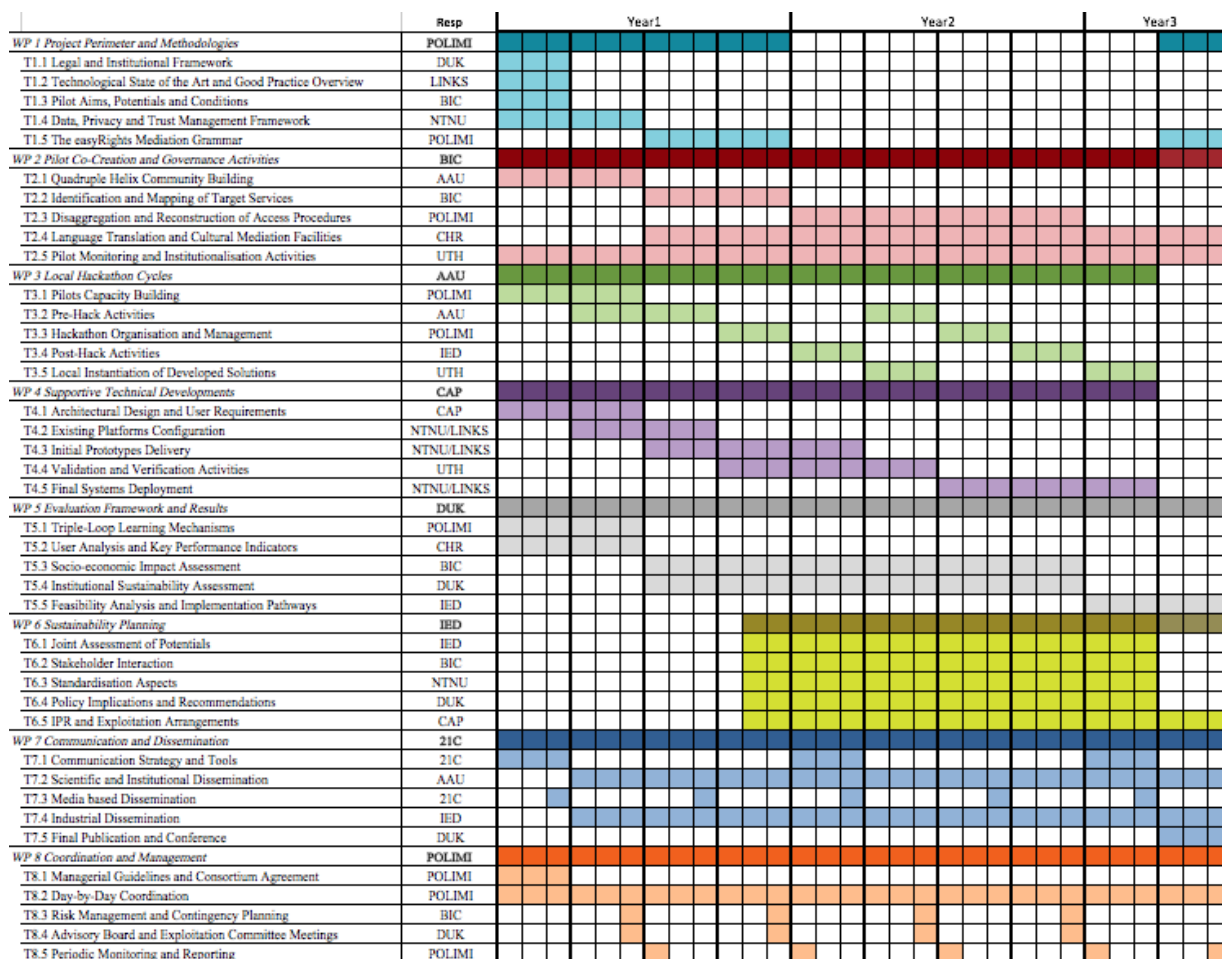


Figure 2: Work Packages timing (GANTT Chart)

3.3 Milestones

A major tool for making technical decisions during the execution of the project is the assessment of identified milestones. For this project, the milestones and associated means of verification are assembled in the following Table.

Table 4: List of milestones

Milestone number	Milestone title	Related WPs	Lead beneficiary	Due date (in month)	Means of verification
MS1	Project website up and running	WP6	IED	2	The project website is developed and correctly updated along through the project process. Means of verification: progress report
MS2	Communication strategy and plan	WP7	21C	3	The communication strategy and plan are completed. Means of verification: deliverable D7.1
MS3	Quality handbook and consortium agreement	WP8	POLIMI	3	The consortium agreement is signed and the quality handbook completed. Means of verification: deliverable D8.1
MS4	Pilots agendas	WP1	POLIMI	6	Pilots agendas are defined. Means of verification: Deliverable 1.3
MS5	Quadruple Helix communities	WP2	BIC	6	Quadruple Helix communities are developed/engaged. Means of verification: deliverable 2.1
MS6	Evaluation approach & instruments defined	WP5	DUK	6	Evaluation plan is completed as including evaluation approach and instruments. Means of verification: deliverable 5.2
MS7	1st hackathon cycle ended in the pilots	WP3	AAU	12	The first hackathon cycle in the pilots is completed. Means of verification: deliverable 3.2
MS8	End of second hackathon cycle	WP3	AAU	24	The second hackathon cycle is completed in all the pilots. Means of verification: deliverable 3.3

MS9	EasyRights platform and tools	WP4	CAP	27	The platform and the tools are completed. Means of verification: progress report
MS10	Final Project Conference	WP7	21C	30	The final conference is organized and carried out. Means of verification: deliverable 7.7
MS11	Mediation Grammar	WP1	POLIMI	30	The mediation grammar is completed. Means of verification: deliverable 1.6

On approaching the dates indicated in Table 3, involved WPLs and collaborators will evaluate the progress towards the identified milestones. The accomplishment of the milestone will be decided upon during a MB meeting.

Whenever necessary, the work plan may be modified as a result of the decisions on the milestones. Major changes of work plan will be communicated to the EC Project Officer as soon as possible, and the most adequate steps will be taken to proceed in the best possible way in order to achieve the project objectives.

3.4 Task responsibilities

The work plan is structured across a number of Tasks corresponding to the various WPs in order to ensure proper and effective implementation and development of the WPs, high-quality and on-time delivery of the deliverables as well as the fulfilment of all the milestones. For detailed descriptions of the Tasks the reader is referred to Annex 1 (Part A) of the [EASYRIGHTS DoA, 2019].

In order to ensure a clear and efficient management of the project, the DoA assigned specific Task responsibilities to the Partners who have, in turn, identified the persons in charge based on their expertise, knowledge, skills and capabilities. The following Table summarizes the project Tasks and the responsible persons for each of them. Based on the DoA we have also added a column showing the collaborating partners for each Task. This does not refer to the internal review function, which will be shared within the partnership on a rotating basis as explained in Section 6 of this document.

Table 5: Work packages and task responsibilities per WP and partner

WP Title	Tasks	Responsible Partner	Leading Person	Collaborating Partners
WP1: Project Perimeter and Methodologies	Task 1.1: Legal and Institutional Framework	DUK	Lydia Roessl	POLIMI, PMO, BCC, LAR, UTH, BIC, CHR
	Task 1.2: Technological State of the Art and Good Practice Overview	LINKS	Giuseppe Rizzo	AAU, LINKS, 21C, UTH, NTNU, IED, CAP, CHR
	Task 1.3: Pilot Aims, Potentials and Conditions	BIC	Sandra Garcia Torres	PMO, BCC, 21C, LAR, UTH, IED, BIC, CHR
	Task 1.4: Data, Privacy and Trust Management Framework	NTNU	Jacques Koreman	POLIMI, LINKS, UTH, CAP
	Task 1.5: The easyRights Mediation Grammar	POLIMI	Grazia Concilio	AAU, PMO, BCC, 21C, LAR, UTH, DUK, IED
WP2: Pilot Co-creation and Governance Activities	Task 2.1: Quadruple Helix Community Building	AAU	Nicola Morelli	PMO, BCC, 21C, LAR, UTH, IED, BIC, CHR
	Task 2.2: Identification and Mapping of Target Services	BIC	Sandra Garcia Torres	PMO, BCC, LAR, UTH, IED, CHR
	Task 2.3: Disaggregation and Reconstruction of Access Procedures	POLIMI	Grazia Concilio	PMO, BCC, LAR, UTH, IED, BIC, CHR
	Task 2.4: Language Translation and Cultural Mediation Facilities	CHR	Brent McHugh	POLIMI, PMO, BCC, LAR, UTH, IED, BIC
	Task 2.5: Pilot Monitoring and Institutionalisation Activities	UTH	Olga Kehagia	AAU, PMO, BCC, 21C, LAR, IED, BIC, CHR
WP3: Local Hackathon Cycles	Task 3.1: Pilots Capacity Building	POLIMI	Grazia Concilio	AAU, PMO, BCC, LAR, UTH, NTNU, IED, BIC, CHR
	Task 3.2: PreHack Activities	AAU	Nicola Morelli	POLIMI, PMO, BCC, 21C, LAR, UTH, DUK, IED, BIC, CHR
	Task 3.3: Hackathon Organisation and Management	POLIMI	Grazia Concilio	PMO, BCC, 21C, LAR, UTH, IED, BIC, CHR

	Task 3.4: PostHack Activities	IED	Anna Koronioti	POLIMI,AAU, PMO,BCC,LA,UTH, DUK,CAP,CHR
	Task 3.5: Local Instantiation of Developed Solutions	UTH	Olga Kehagia	POLIMI,AAU,PMO, BCC,LAR,DUK,NTN U,IED,BIC,CAP,CHR
WP4: Supportive Technical Developments	Task 4.1: Architectural Design and User Requirements	CAP	Inna Tolskaya	LINKS,PMO,BCC,21 C,LAR,UTH,NTNU,I ED,BIC,CHR
	Task 4.2: Existing Platforms Configuration	LINKS, NTNU, CAP	Giuseppe Rizzo, Jacques Koreman, Inna Tolskaya	-
	Task 4.3: Initial Prototypes Delivery	LINKS, NTNU,	Giuseppe Rizzo, Jacques Koreman	-
	Task 4.4: Validation and Verification Activities	UTH	Olga Kehagia	PMO,BCC,21C,LAR, IED,BIC,CAP,CHR
	Task 4.5: Final Systems Deployment	LINKS, NTNU, CAP	Giuseppe Rizzo, Jacques Koreman, Inna Tolskaya	-
WP5: Evaluation Framework and Results	Task 5.1: Triple Loop Learning Mechanisms	POLIMI	Grazia Concilio	PMO,BCC,21C,LAR, UTH,IED,BIC,CHR
	Task 5.2: User Analysis and Key Performance Indicators	CHR	Brent McHugh	POLIMI, AAU,LINKS,UTH,DU K,NTNU,BIC,CAP
	Task 5.3: Socioeconomic Impact Assessment	BIC	Sandra Garcia Torres	-
	Task 5.4: Institutional Sustainability Assessment	DUK	Lydia Roessl	-

	Task 5.5: Feasibility Analysis & Implementation Pathways	IED	Anna Koronioti	DUK,NTNU
WP6: Sustainability Planning	Task 6.1: Joint Assessment of Potentials	IED	Anna Koronioti	POLIMI,AAU,LINKS, 21C,NTNU,CAP,CH R
	Task 6.2: Stakeholder Interaction	BIC	Sandra Garcia Torres	All partners
	Task 6.3: Standardisation Aspects	NTNU	Jacques Koreman	POLIMI,LINKS,,21C, NTNU,CAP
	Task 6.4: Policy Implications and Recommendations	DUK	Lydia Roessl	POLIMI,AAU,LINKS, PMO,BCC,LAR,UTH, DUK,IED,BIC,CHR
	Task 6.5: IPR and Exploitation Arrangements	CAP	Inna Tolskaya	POLIMI, AAU,LINKS,21C,NT NU,IED
WP7: Communication and Dissemination	Task 7.1: Communication and Dissemination Strategy and Tools	21C	Susie Ruston McAleer	-
	Task 7.2: Scientific and Institutional Dissemination	AAU	Nicola Morelli	POLIMI,LINKS,PMO ,BCC,LAR,UTH,DUK, NTNU,BIC,CAP
	Task 7.3: Media based Dissemination	21C	Susie Ruston McAleer	POLIMI, AAU,LINKS,PMO,B CC,21C,LAR,UTH,D UK,NTNU,IED,BIC,C AP,CHR
	Task 7.4: Industrial Dissemination	IED	Anna Koronioti	LINKS,21C,LAR,IED, CAP
	Task 7.5: Final Publication and Conference	DUK	Lydia Roessl	All partners
WP8: Coordination	Task 8.1: Managerial Guidelines	POLIMI	Grazia Concilio	-
	Task 8.2: Day-by-day project coordination	POLIMI	Grazia Concilio	All partners

and Management	Task 8.3: Risk management and contingency planning	BIC	Sandra Garcia Torres	-
	Task 8.4: Advisory Board and Exploitation Committee Meetings	DUK	Lydia Roessl	POLIMI,AAU,LINKS, DUK,NTNU,IED
	Task 8.5: Periodic monitoring and reporting	POLIMI	Grazia Concilio	All partners
WP9: Ethics requirements	This work package sets out the ethics requirements that the project must comply with	POLIMI	Grazia Concilio	All partners

As far as the “collaborating partners” (last column of the above Table) are concerned it will be a sole responsibility of Task Leaders to invoke, mobilize and exploit the respective persons’ expertise, knowledge and capabilities.

3.5 Deliverable responsibilities

Within part A of the DoA, each project Deliverable has been assigned a specific responsibility, normally to the Partner in charge of the corresponding Task or to one of the key collaborators. The following Table identifies the specific persons in charge of the timely and high-quality submission of the project Deliverables.

Table 6: Deliverable responsibilities per WP and partner

WP Title	Deliverable	Deadline (Month/year)	Responsible Partner	Leading Person
WP1: Project Perimeter and Methodologies	D1.1: Ontology Tree with Topics and Entries	Jan-2020	DUK	Lydia Roessl
	D1.2: Technological State of the Art and Mockup solutions	Mar-2020	LINKS	Giuseppe Rizzo
	D1.3: Pilot agendas	Mar-2020	BIC	Sandra Garcia Torres
	D1.4: Data Management Plan	Jun-2020	NTNU	Jacques Koreman
	D1.5: The easyRights Mediation Grammar 1	Dec-2020	POLIMI	Grazia Concilio
	D1.6: The easyRights Mediation Grammar 2	Jun-2022	POLIMI	Grazia Concilio

WP2: Pilot Co-creation and Governance Activities	D2.1: Report on Pilot Co-creation and Governance Activities 1	Mar-2021	BIC	Sandra Garcia Torres
	D2.2: Report on Pilot Co-creation and Governance Activities 2	Jan-2022	BIC	Sandra Garcia Torres
WP3: Local Hackathon Cycles	D3.1: Hackathon Guidelines	Jun-2020	POLIMI	Grazia Concilio
	D3.2: First Hackathon Report	Dec-2020	AAU	Nicola Morelli
	D3.3: Second Hackathon Report	Dec-2021	AAU	Nicola Morelli
WP4: Supportive Technical Developments	D4.1: Requirement Analysis	Jun-2020	CAP	Inna Tolskaya
	D4.2: CALST/Capeesh Platform 1	Mar-2021	NTNU	Jacques Koreman
	D4.3: Recommender System 1	Mar-2021	LINKS	Giuseppe Rizzo
	D4.4: NLU System 1	Mar-2021	LINKS	Giuseppe Rizzo
	D4.5: CALST/Capeesh Platform 2	Mar-2022	NTNU	Jacques Koreman
	D4.6: Recommender System 2	Mar-2022	LINKS	Giuseppe Rizzo
	D4.7: NLU System 2	Mar-2022	LINKS	Giuseppe Rizzo
WP5: Evaluation Framework and Results	D5.1: Triple Loop Learning Mechanisms	Jun-2020	POLIMI	Grazia Concilio
	D5.2: User Analysis and Key Performance Indicators	Jun-2020	CHR	Brent McHugh
	D5.3: Socioeconomic Impact Assessment	Dec-2021	BIC	Sandra Garcia Torres
	D5.4: Institutional Sustainability Assessment	Dec-2021	DUK	Lydia Roessl
	D5.5: Feasibility Analysis and Implementation Pathways	Jun-2022	IED	Anna Koronioti

WP6: Sustainability Planning	D6.1: Business Exploitation Plan First Draft	Dec-2020	CAP	Inna Tolskaya
	D6.2: Policy Brief 1	Dec-2020	DUK	Lydia Roessler
	D6.3: Value Appraisal	Mar-2022	IED	Anna Koronioti
	D6.4: Stakeholder Database	Mar-2022	BIC	Sandra Garcia Torres
	D6.5: Standardisation Plan	Mar-2022	CHR	Brent McHugh
	D6.6: Policy Brief 2	Mar-2022	DUK	Lydia Roessler
	D6.7: Business Exploitation Plan	Dec-2021	CAP	Inna Tolskaya
WP7: Communication and Dissemination	D7.1: Communication and Dissemination Plan 1	Mar-2020	21C	Susie Ruston McAleer
	D7.2: Communication and Dissemination Plan 2	Jun-2021	21C	Susie Ruston McAleer
	D7.3: Communication and Dissemination Plan 3	Mar-2022	21C	Susie Ruston McAleer
	D7.4: Proceedings of the Final Conference	Jun-2022	DUK	Lydia Roessler
WP8: Coordination and Management	D8.1: Quality Handbook	Mar-2020	POLIMI	Grazia Concilio
WP9: Ethics requirements	D9.1: H - Requirement No. 3	Jun-2020	POLIMI	Grazia Concilio
	D9.2: POPD - Requirement No.7	Feb-2020	POLIMI	Grazia Concilio

As above, it is expected that the responsible person of each Deliverable will invoke, mobilize and exploit the respective partner representatives' expertise, knowledge and capabilities, to form a team of collaborators who will support him/her in the delivery of excellent outputs.

3.6 Change management

All changes must be initiated by or communicated to the PC who will examine their impact on budget, efforts, schedule, scope, and quality of activities and results.

The PM will ensure that any approved changes are communicated to the project partners. Additionally, as changes are approved, the PM will ensure that the changes are captured in the project documentation where necessary. The resulting updates must then be communicated to all the consortium members.

All changes will be controlled and documented by the PM.

4. Managerial control and reporting

In the easyRights DoA, it is clearly stated that all partners will perform their part of the project work according to some common internal quality control and assurance procedures, e.g. with respect to experimental procedures and review of reports. This chapter has the goal of clarifying which specific mechanisms will be adopted during the project to ensure the timely and successful performance of all contractual tasks.

4.1 Managerial control

Managerial control defines the strategies and rules for the achievement of project objectives, keeping the overall performance monitored, in relation to the actual work done, the resources utilised/deployed and their associated costs, according to the principles of economy, expertise, efficiency and effectiveness.

In coherence with the structure of responsibilities described in the previous section, managerial control will result from decentralised monitoring and reporting instead of "command and control" activities, in particular:

- Each partner will be held responsible for putting in place the most adequate mechanisms for the realisation of the activities directly assigned to it and to make sure that the identified persons in charge will provide all necessary and/or required contributions to project milestones, tasks and deliverables;
- The responsible person of each Deliverable will control the delivery time and quality of requested contributions;
- The responsible person of each Task will control the timely and quality execution of the required sub-tasks;
- The responsible person of each WP will control the timely and quality execution of the corresponding tasks, including the status of deliverables, milestones and financial aspects of the WP and promptly inform the PC in case of any deviations, issues or unforeseen circumstances;
- The PSC will control the timely and quality performance of project WPs and report to the GA on an annual basis on the global progress of activities;
- The PC will monitor and direct the activities of all WP Leaders;
- The GA will receive regular reports from the PC and PSC and is entitled to ask for extraordinary briefs on issues requiring special consideration or contingent action(s).

4.2 Periodic reporting

4.2.1 Technical and financial reports

The PC must submit to the EC periodic technical and financial reports. These must be drawn up using the forms and templates provided in the Sygma electronic exchange system.

The project is divided in the following two 'reporting periods':

- RP#1: from month 1 to month 12
- RP#2: from month 13 to month 30

The PC must submit a progress report within 60 days following the end of each reporting period.

The progress report must include:

- a 'technical report' containing, among others, an explanation of the work carried out by the beneficiaries and an overview of the progress towards the objectives of the action, including milestones and deliverables identified in DoA.
- a 'financial report' containing an individual statement from each beneficiary, for the reporting period concerned, detailing the eligible costs for each budget category, and an explanation of the use of resources and the information on subcontracting and in-kind contributions provided by third parties from each beneficiary, for the reporting period concerned.

The following picture shows the look-and-feel of the official EC model for a partner's financial statement, as it is current by the date of this Deliverable:

FINANCIAL STATEMENT FOR [BENEFICIARY [name]] LINKED THIRD PARTY [name]] FOR REPORTING PERIOD [reporting period]

Eligible ¹ costs (per budget category)													Receipts		EU contribution			Additional information																
A. Direct personnel costs				B. Direct costs of subcontracting		C. Direct costs of financial support		D. Other direct costs			E. Indirect costs ²		[F. Costs of ...]		Total costs	Receipts	Reimbursement rate %		Maximum EU contribution ³	Requested EU contribution														
A.1 Employees (or equivalent) A.2 Natural persons under direct contract A.3 Seconded persons A.4 Personnel for providing access to research infrastructure				A.4 SME owners without salary A.5 Beneficiaries that are natural persons without salary		C.1 Financial support C.2 Prizes		D.1 Travel D.2 Equipment D.3 Other goods and services			D.4 Costs of large research infrastructure D.5 Costs of internally invoiced goods and services		F.1 Costs of ... F.2 Costs of ...			Receipts of the action, to be reported in the last reporting period, according to Article 5.3.3																		
Form of costs ⁴													Flat-rate ⁵		Unit		[Unit][Lump sum]																	
Actual				Unit		Actual		Actual			Unit		25%		Total		Total		Total															
a				Total b		No hours		Total c		d		[e]		f			[g]		Total h		i = 0.25 * (a+b+c+d+e+f+g+h) / j		k = a+b+c+d+e+f+g+h / i		l		m		n		o		p	
[short name beneficiary/linked third party]																																		

The beneficiary/linked third party hereby confirms that:
The information provided is complete, reliable and true.
The costs declared are eligible (see Article 6).
The costs can be substantiated by adequate records and supporting documentation that will be produced upon request or in the context of checks, reviews, audits and investigations (see Articles 17, 18 and 22).
For the last reporting period: that all the receipts have been declared (see Article 5.3.3).

¹ Please declare all eligible costs, even if they exceed the amounts indicated in the estimated budget (see Annex 2). Only amounts that were declared in your individual financial statements can be taken into account later on, in order to replace other costs that are found to be ineligible.

² See Article 6 for the eligibility conditions

³ The indirect costs claimed must be free of any amounts covered by an operating grant (received under any EU or Euratom funding programme; see Article 6.2.E). If you have received an operating grant during this reporting period, you cannot claim indirect costs unless you can demonstrate that the operating grant does not cover any costs of the action.

⁴ This is the theoretical amount of EU contribution that the system calculates automatically (by multiplying the reimbursement rate by the total costs declared). The amount you request (in the column 'requested EU contribution') may be less.

⁵ See Article 5 for the forms of costs

⁶ Flat rate : 25% of eligible direct costs, from which are excluded: direct costs of subcontracting, costs of in-kind contributions not used on premises, direct costs of financial support, and unit costs declared under budget category F if they include indirect costs (see Article 6.2.E)

⁷ Only specific unit costs that do not include indirect costs

Figure 3: Model of financial statement

The above will be put at each partner's disposal on due time by the easyRights coordinator.

In addition, following the same procedure as above, the coordinator must submit to the EC the final project report within 60 days after the end of the last reporting period, covering all the work, objectives, activities, major achievements, findings, results and conclusions.

The final report must include:

- a 'final technical report' with a summary for publication containing an overview of the results and their exploitation and dissemination; the conclusions on the action, and the socio-economic impact of the action;
- a 'final financial report' containing a 'final summary financial statement' and a 'certificate on the financial statements' for each beneficiary who received a total contribution from the EC of EUR 325 000 or more.

4.2.2 Internal reports

On a quarterly basis, for internal monitoring purposes, the PC is entitled (but not obliged) to request to each WPL a brief quarterly progress report of the activities undertaken, as well as the results obtained by the respective WPs, in order to keep a proper degree of coordination between the different teams working on the project and achieve an early detection of possible problems and/or non-conformities in execution of the Risk Management Plan.

During the easyRights lifetime, periodic audio/video conferences will be launched by the PC with the involvement of the WPL as well as the appointed Innovation Manager.

Additionally, dedicated sessions to progress monitoring and assessment of the project as a whole will be run in every forthcoming consortium meeting.

4.2.3 Time sheets

All Partners, be they public or private, are mandated to keep detailed time records for the number of hours declared by their internal staff as well as in-house consultants. The time records must be:

- Done in writing
- Signed by the persons working on the action and their supervisors
- Prepared at least monthly.

Manpower costs insufficiently substantiated in the above fashion may be declared ineligible and be rejected, and the EU grant shall be reduced. It is therefore strongly advisable that every Partner immediately starts keeping these records – this being their sole responsibility for the whole Project duration.

The following picture shows an example of H2020 timesheet template that should not be considered as anyway binding. Some partners may prefer not to use this but other templates that are more aligned with their own internal accounting procedures.

TIME RECORDING FOR A HORIZON 2020 ACTION		Month	Year																													
Title of the Action (Acronym)		Grant Agreement Number																														
Beneficiary's / third party's name																																
Person working in the action																																
Name of the person		Type of personnel (see art. 6.2.A GA)																														
DAY	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	Σ
Reference e.g. WP #																																0
																															0	
																															0	
																															0	
																															0	
																															0	
																															0	
																															0	
Total Σ Hours																															0	
Short description of the activities carried out in the month:																																
Signed (Name of the person):																Signed (Name of the supervisor):																
Date:																Date:																

Figure 4: Timesheets template

4.3 Record keeping

Throughout the whole project's duration, both the PC and the Partners will maintain full records of the work performed and its results in electronic and/or paper form.

The PM has the responsibility of maintaining the archives of the project, which will include:

- The contractual documents and all the official correspondence with the EC
- All the project related correspondence among the partners
- All contractual deliverables and progress reports (both internal and external)
- This Project Management Handbook
- All the meeting's minutes with actions and status
- Any other important document or material.

All of the above will be stored in the official document repository described in chapter 5 that follows.

Each Partner will maintain a record of all the documents they are responsible for or that concern them.

Record keeping responsibility includes storing and maintaining records in such a way that they are protected against damage, deterioration or loss.

Especially with respect to the electronic records that have not yet uploaded to the shared repository (i.e. the working files or proceedings of bilateral correspondences), all partners are obliged to perform back-ups regularly. The coordinator will take care of backing-up the shared workspace.

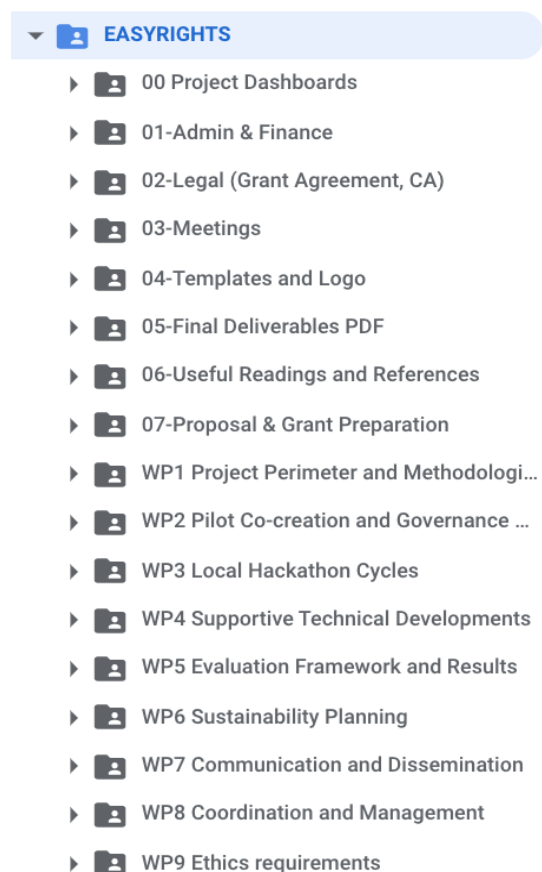
5. Document storage and communication system

The above described organisational structure and decision-making mechanisms rely on an effective communication within the consortium. The communication strategy of easyRights is based on three pillars: the day-to-day communication among partners, the web-based communication and the project meetings. To support the collaborative work in the easyRights project, all partners are required to navigate effectively the project development in the web-based communication which consists of an external, public website and an internal, password restricted, shared working environment.

As decided in the KOM, both Google Drive and Basecamp services are identified as two platforms where all relevant project documents such as reports, documents and files, meeting minutes and presentations will be posted and the project partners will gain access to downloading and uploading data and materials.

Please note: The Google Drive tool serves as the document repository and also provides a web-based office suite for online collaboration on the documents: Google Docs, Google Sheets, and Google Slides. While, the Basecamp acts as the project's main and only communication platform, meaning that no remote interaction or written communication between partners will be considered as official evidence of collaborative work on the project unless recorded on Basecamp's logs. The PM will actively stimulate and facilitate a smooth interaction between all actors, employees and personnel involved in the project within these two platforms.

5.1 Google Drive for the document repository and online collaboration workspace



A shared Google Drive folder named 'EASYRIGHTS' (available under this [link](#)) has been shared with all partners. The online repository is managed by the EASYRIGHTS Project Manager who makes sure that all the project documentation is uploaded and up-to-date.

The shared folder named 'EASYRIGHTS' appears under the 'Shared with me' item on your [Google Drive](#). It is recommended to drag and drop the 'EASYRIGHTS' folder to 'My Drive' so that you always find it back. Please do not change the names of the first two levels of folders in your Google drive since your change applies to all.

Please note: an email address linked to a Google account is needed to access the EASYRIGHTS repository. If any partner wants to use an email address (e.g. your Google email) that is different from the one to which the access was provided, please contact the Easyrights project manager or simply request the access to the folder online.

Figure 5: Folder structure of the Google Drive repository

The project online repository has been structured in multiple sub-folders for easier navigation when searching for the project files (Admin and Finance, Legal, Meetings, Templates and Logo, Final Deliverables etc.). Each Work Package has a dedicated folder that shall be used by all Consortium partners for online collaboration within the WP teams. The main folder also contains online spreadsheets with the contacts to all Consortium partners and the list of the deliverables' reviewers. For the sake of effective collaboration within the Consortium, partners are requested to use these online tools when working on the project documents.

5.2 Basecamp for daily online collaboration and communication

Basecamp is the easyRights workspace where all partners access and collaborate with teams. It is the environment for the discussions, to-dos calendar and reflections. Coordinator, project manager and WP leaders and team members are asked to use Basecamp for all the interactions related to any project activity. Basecamp provides its users a variety of functions, which are available directly from the menu

panel. These include the following that are discussed below in detail: Campfire, Message Board, To-dos, Schedule, Automatic Check-ins, Docs & Files.

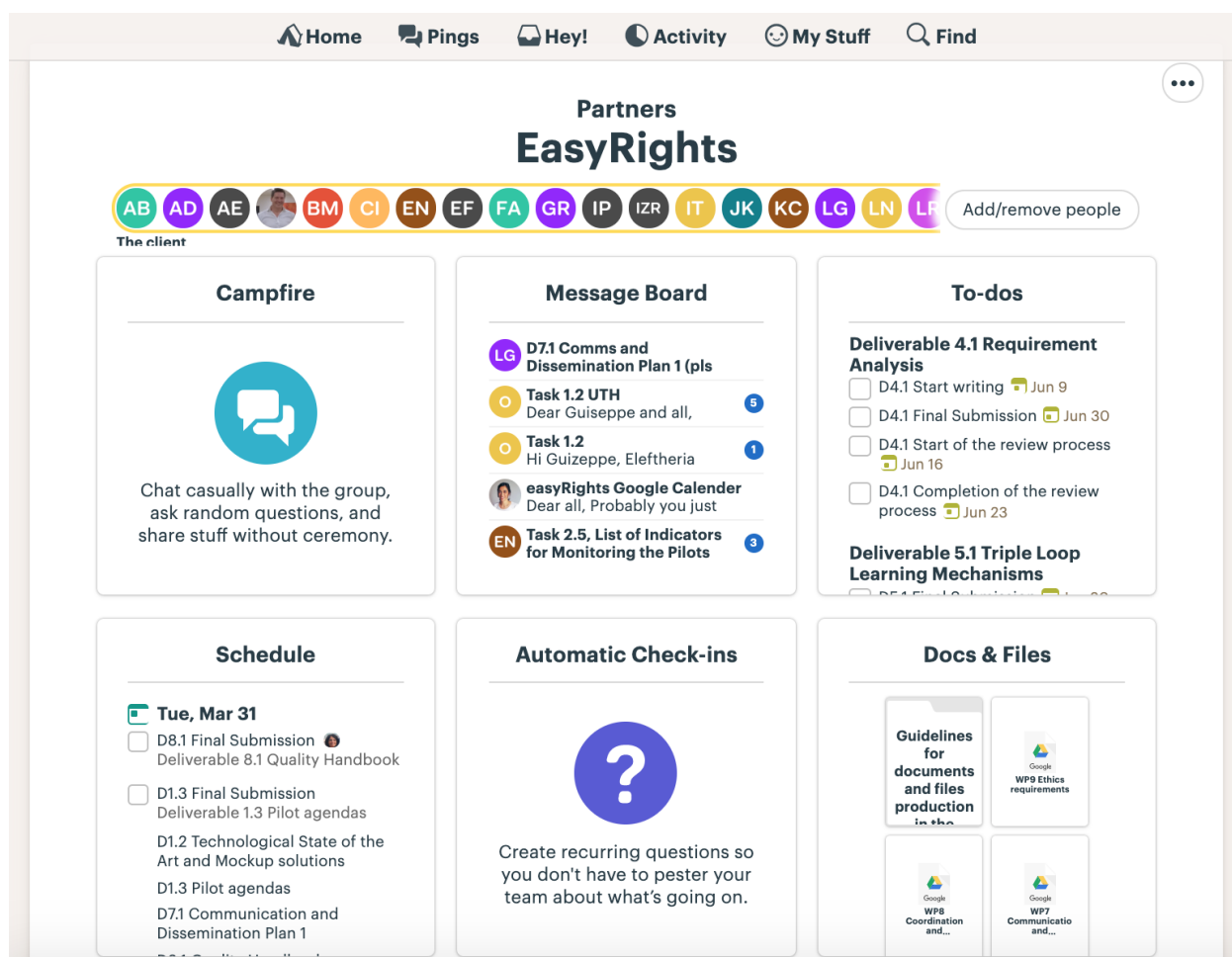


Figure 6: Key functions within Basecamp

The menu bar at the top of the main page shows Home, Pings, Heys, Latest activities, My Stuff, and Find. In the body of the page there are six work areas including Campfire, Message Board, To-dos, Schedule, Automatic Check-ins, Docs & Files.

Please note: In easyRights projects, Basecamp is set as the web-based tool for the internal communication, scheduling and progress monitoring in terms of deliverables, milestones and task completion. After the KOM meeting, the PM has started configuring Basecamp for the purposes of the project, assigning tasks and deadlines according to the decisions taken therein. However, it should be remembered that it is a sole responsibility of the partners to make sure that all members of their working teams have registered in the platform, either autonomously or by invitation from another colleague.

5.2.1 Campfire

Campfire is the place to chat in real time with partners. To enter a Campfire click on the Campfire window. Scroll up/down in a chat window to view what you missed. When you want to add a comment, type your text at the bottom of the window and press enter.

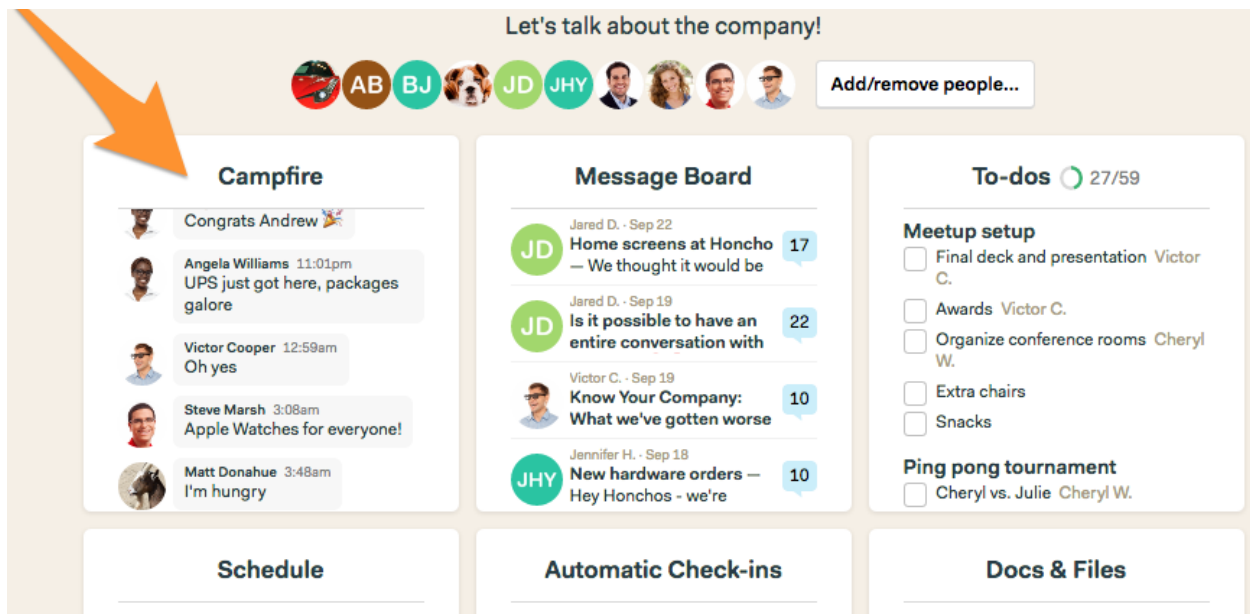


Figure 7: Campfire menu

To catch someone's attention in Campfire, you can @mention them by typing the "@" symbol followed by their name. They'll receive a notification for the mention. To stay current in specific Campfires, click "Follow" at the top right of the window.

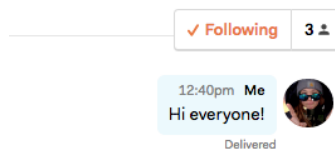


Figure 8: Following someone on a Campfire

5.2.2 Message Board

The Message Board is used when you want to post an idea that doesn't necessarily belong in a text doc or in a Campfire — but you do want others to see it, and for it to have a more permanent place to live. The Message Board doesn't aggregate conversations that happen elsewhere — it's only for messages and discussions posted here.

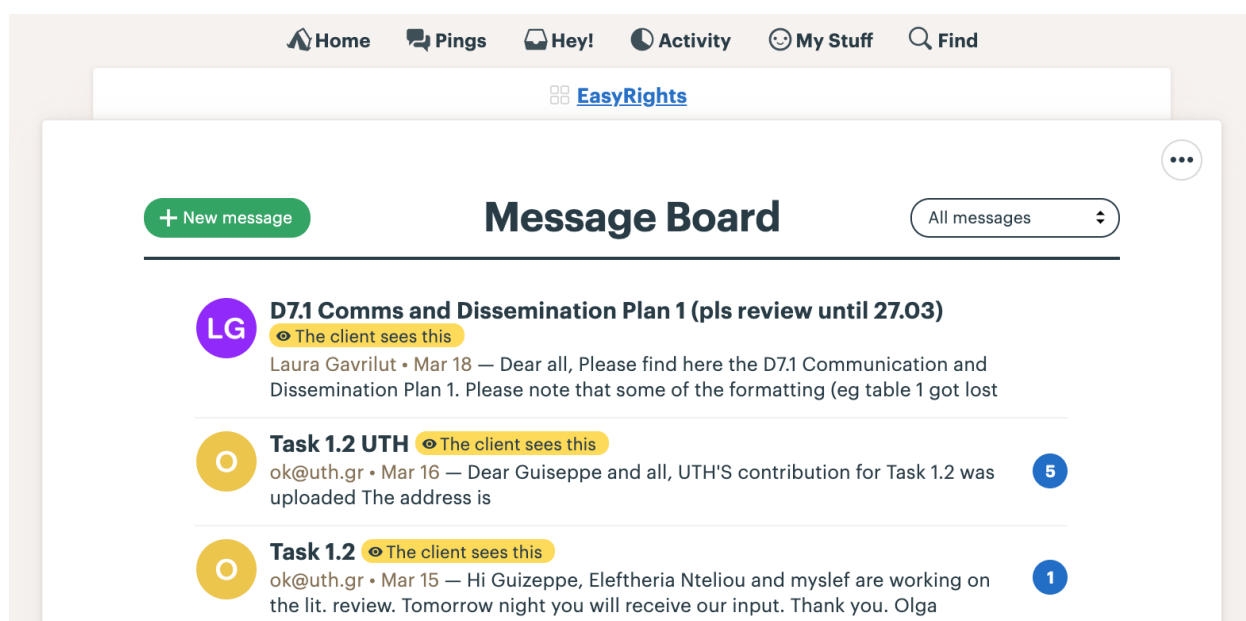


Figure 9: Message Board's interface

To create a new message, enter the Message Board card and click “New message”. Format your text with the tool bar. You can add headings, and bulleted or numbered lists. Click the indent icons (or press Tab on your keyboard) to make a sublist.

Please note: All the partners are invited not to annex documents within the Message Board on Basecamp, rather they are requested to use exclusively the correct links to the documents created in Google Drive. Also, all the partners are encouraged to use the Ping function more as it's like an email that is sent to a specific person rather than a message that is sent to the whole consortium.

5.2.3 To-Do Lists

To start a new list, assign it a name and click “Create to-do-list”. You can also add notes about the list.

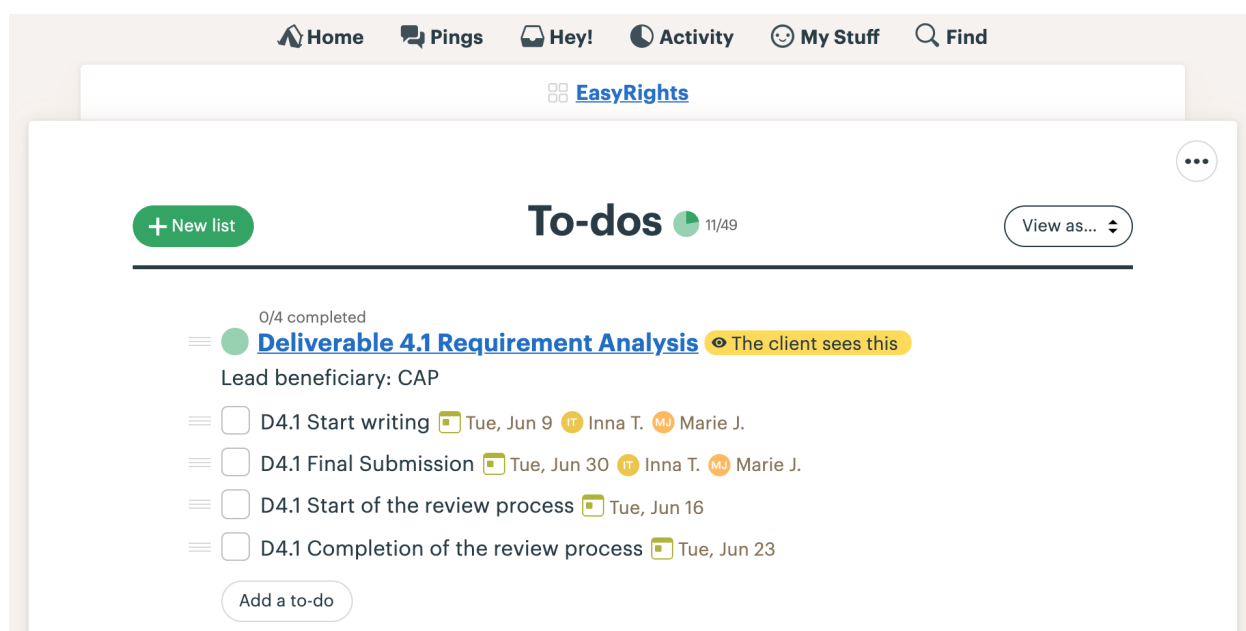


Figure 10: To-do list of easyRights deliverable reviews

Start adding to-do's and assigning them to users. When you begin typing their name in the "Assign" field, Basecamp will display matching results. When you assign a to-do to someone else, they'll receive a notification. Once it's done, they can click in the checkbox next to the to-do to mark it as complete. To-dos can also be assigned a due date or a span of dates — select the radio button for the type you need. Then, select the date(s). The person assigned will get a reminder notification at 9:00 AM the day before the due date and again at 9:00 AM on the day it's due. Leave a note if the to-do needs more detail. To edit a list or to-do title, click on it, then click "Edit" at the top left. When you're done, click "Save changes".

Move items in your list or between lists by clicking and dragging the small grip icon to the left. Drop them in their new place. You can do this with entire lists, too!

You can see the number of completed to-dos in your lists at a glance, so you always know how much you've done. You can also select List view and Card view from this sub menu.

Please note: At this moment, in the To-dos section, four deadlines are associated with each deliverable: i) start writing (4 weeks), ii) start of the review process (2 weeks), iii) completion of the review process (1 week), iv) final submission. The WP Leaders can modify these dates based on their workloads and activities.

5.2.4 Schedule

Click on the Schedule tool/icon to get started. Click the "Add an event" button. Enter the details about your event. Events can be single day or multi-day. You can have full-day events, or events with a start and end time. Select the members who are involved. Basecamp can send them a notification about the event. Add a note to give your team more information.

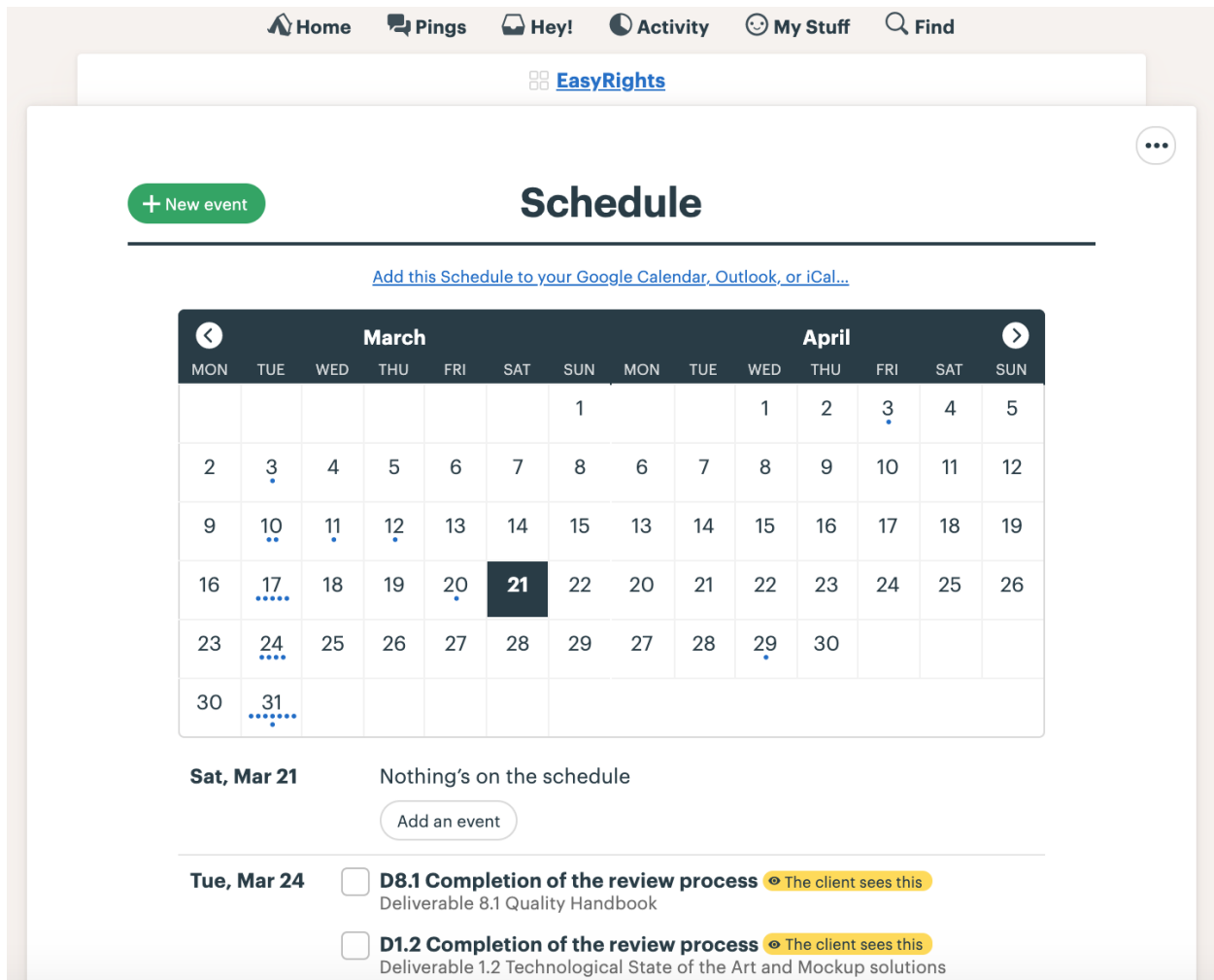


Figure 11: Look-and-feel of the Schedule tool of easyRights

After you save your event, you can add it to your personal calendar, using the iCal options. To sync your entire schedule with Google Calendar or another external calendar program, click on the Subscribe button in your Basecamp's Schedule card located on the top left side. Follow the instructions to subscribe with your Google Calendar, or click on the links to launch iCal/Outlook.

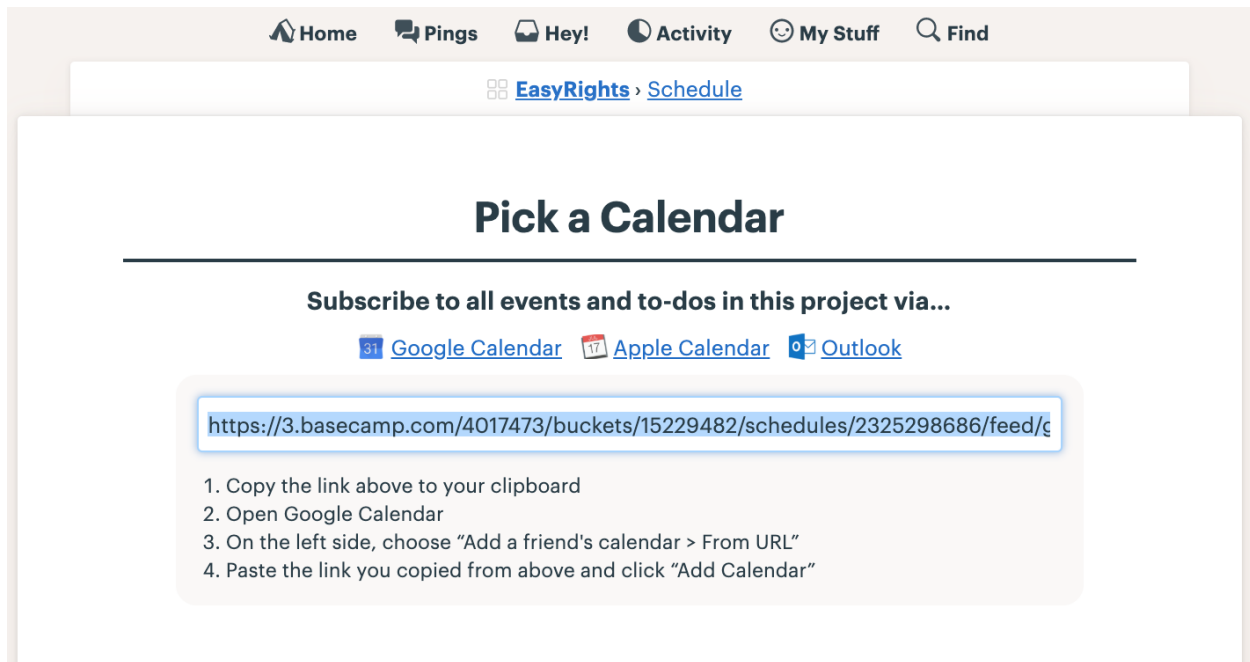


Figure 12: The instructions to subscribe all the events to your Google Calendar

Please note: Your schedule lists all your events, along with to-do's with a due date. You'll see who's involved with your events, and who is assigned to the to-do. Click the title of the event or to-do to view it. Click the looking back tab to view events and to-do's from the past.

5.2.5 Automatic Check-ins

At Basecamp, automatic check-ins are used to find out what everyone is up to. Automatic check-ins go out on a regular basis: daily, weekly, or monthly. Everyone in the Project can see the responses. Automatic check-ins keep teams up to date, and help your users get to know each other better.

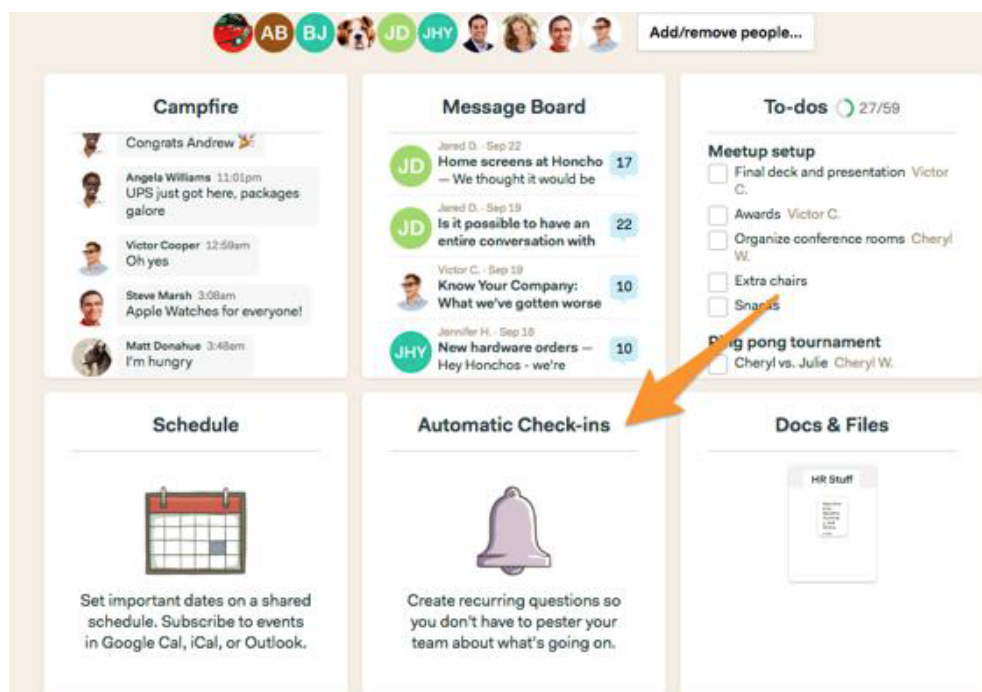


Figure 13: Creating/updating an Automatic Check-in

To set up an automatic check-in, click the Automatic Check-ins card in the Project, and click to “Set up an automatic check-in”. Type your question, select who should be asked, then select how often and at what time you’d like to ask it. When it's time to answer an automatic check-in, you'll receive a notification.

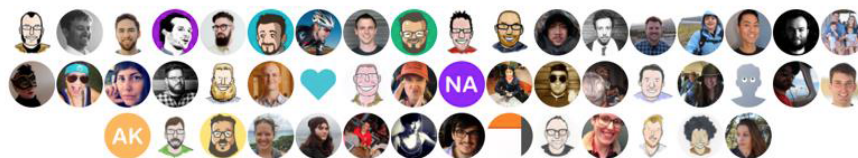
Automatic Check-Ins

Use this to keep up with your team on a regular schedule. You'll constantly get new insights and answers!

Set up an automatic check-in

What did you work on today?

🔄 Asking 50 people every weekday at 5pm.



What's one thing that inspired you this week?

🔄 Asking 50 people every Friday at 9am.

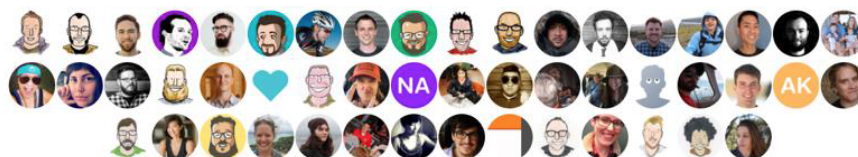


Figure 14: Look-and-feel of the Automatic Check-in

5.2.6 Docs & Files

In easyRights, the Docs & Files section is directly linked to the Google Drive environment. For a correct management of the Basecamp space all partners and participants are asked to generate clear titles for the messages on the Message Board by adding the responsible partners and directly link the message to the file and documents restored in Google Drive.

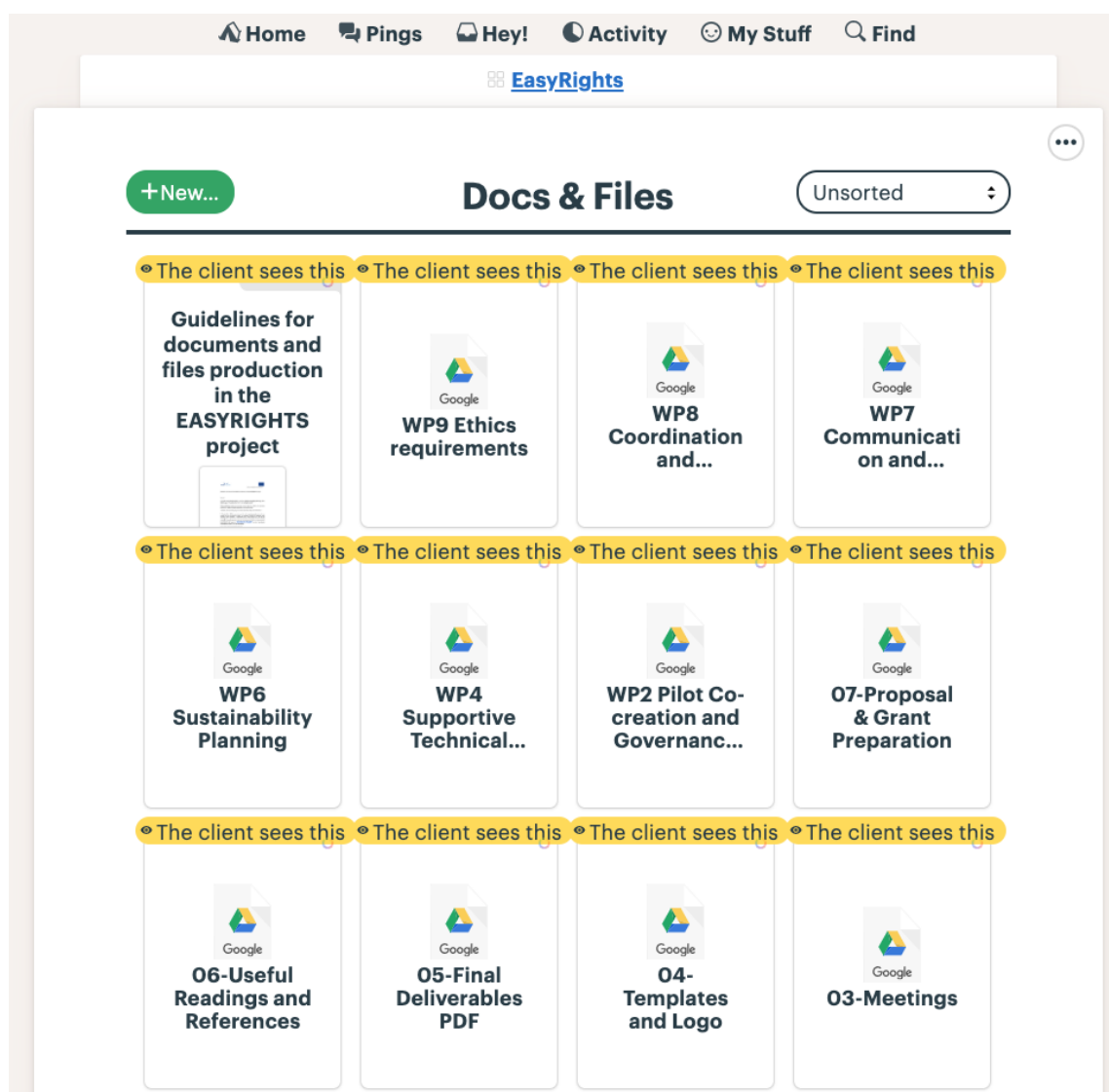


Figure 15: Look-and-feel of the Docs & Files that is directly linked to the Google Drive environment

Please note: The only file stored on Basecamp is the Guidelines for documents and file productions as decided to not upload any files on Basecamp and store all the documents on Google Drive. Each partner and their team members have to upload their files on the related folder in Google Drive, then they write their message on the Message Board and insert the link to Google Drive on the note.

5.3 Mailing lists

In easyRights project most of the communications are managed through the Basecamp. While for some urgent and important issues, the list of Consortium contacts including email, phone number and Skype ID

has been established at the start of the project (available under this [link](#)). The list is organized for handling administrative and technical and pilot's related questions arising in the project.

5.4 Shared calendar

The project manager maintains and keeps up-to-date a project calendar called [EASYRIGHTS Project](#) that has been shared with the partners. The events and dates represented in this calendar are synchronized with the [Schedule](#) and [To-dos](#) tools on Basecamp in order to keep up with the project and add the relevant partners to each event and task.

6. Timeliness and quality of project deliverables

Each partner is responsible for the timeliness and quality of the deliverables assigned to them. This section includes the provisions set forth to ensure the above to the best possible extent.

6.1 Revised timing of deliverables

As far as timeliness is concerned, during the Brussels KOM, an agreement was reached among the partners, to issue each project deliverable in its final draft version at least one month ahead of its official deadline to allow the time for reviewing and approval process. The following Table provides the internal dates of issuance of easyRights deliverables by month 6. In addition, it identifies the appointed internal reviewers for the deliverables expiring until the end of the first reporting period.

Table 7: Internal review deadlines of easyRights deliverables by month 6

WP	Deliverable	Internal Deadline (Month/year)	Internal Reviewer	External Reviewer
WP1	D1.1: Ontology Tree with Topics and Entries	Feb-2020	Susie Mcaleer (21C), Nicola Morelli (AAU), Inna Tolskaya (CAP), Francesco Molinari (POLIMI)	Paola Regina Gudrun Biffl
WP9	D9.2: POPD - Requirement No.7	Feb-2020	Awareness-Review by the Pilots (PMO, BCC, LAR, CHR)	-
WP1	D1.2: Technological State of the Art and Mockup solutions	Feb-2020	Awareness-Review by the Pilots (PMO, BCC, LAR, CHR) and POLIMI: Francesco Molinari	-
WP1	D1.3: Pilot agendas	Feb-2020	(LINKS), (NTNU), (CAP)	-
WP7	D7.1: Communication and Dissemination Plan 1	Feb-2020	Marie (CAP), Sandra (BIC) and Francesco Molinari (POLIMI)	-
WP8	D8.1: Quality Handbook	Feb-2020	AWARE all the partners and Francesco Molinari (POLIMI)	-
WP1	D1.4: Data Management Plan	May-2020	AWARE all the partners and Francesco Molinari (POLIMI)	-

WP3	D3.1: Hackathon Guidelines	May-2020	AWARE pilots and Francesco Molinari (POLIMI)	-
WP4	D4.1: Requirement Analysis	May-2020	IED, DUK, AUU and Francesco Molinari (POLIMI)	-
WP5	D5.1: Triple Loop Learning Mechanisms	May-2020	UTH, DUK and Francesco Molinari (POLIMI)	-
WP5	D5.2: User Analysis and Key Performance Indicators	May-2020	AAU, UTH and Francesco Molinari (POLIMI)	-
WP9	D9.1: H - Requirement No. 3	May-2020	ALL PARTNERS aware	Paola Regina

Basecamp is set up with all the internal delivery dates shown above and the dates of the next deliverables will be updated as well.

6.2 Delivery preparation, review and approval process

Wherever possible, all deliverables are prepared in a standard format based on the template in Appendix A to this document. The Deliverable template is provided in order to ensure the uniform and consistent presentation of deliverables to the European Commission. All deliverables should use this Deliverable template. Generally speaking, each Deliverable falls under the responsibility of a single Project Partner – usually, the corresponding Task Leader – under the supervision of the respective WPL, while the PC and PM are globally responsible for the quality of the whole project and its results. The Partner responsible for the Deliverable is required to ensure that before releasing the first draft to other partners, it is in the correct template and file format. The responsible Partner is required to prepare the ToC using the official deliverable template within one month after the start of the corresponding Task and circulate it to all Task participants (see Table 5 above).

All activities and contributions are to be agreed among task participants. Contributing/collaborating partners are required to provide their inputs within the period of time specified by the responsible partner. There can be a number of draft and intermediate releases before the final Deliverable is submitted to the internal review process.

In view of the above, the responsible Partner shall prepare the ToC of the Deliverable. After the TOC has been finalized and the division of work has been carried out, the responsible partner should also provide specific guidelines for the development of the contributions of each partner. The responsible partner also assigns writing tasks to and collects the contributions from the other partners involved, and finally shares to Google Drive a final draft already confectioned with the required specifications and format, one month ahead of the stipulated (contractual) deadline.

As a general rule, the PC shall be the ultimate reviewer of each deliverable, to ensure the above process has been fulfilled by all actors involved. In case her review leads to conclude that the Consortium cannot send a deliverable on time to the EC, the PC shall inform the EC before the deadline, justify the delay and

suggest a new deadline. For this reason, all partners shall send early warnings about possible delays to the PM using the Basecamp messaging system.

Each deliverable will be submitted to internal reviewers, who are normally project partners who have not participated in the realisation of that deliverable. The internal reviewers shall examine and evaluate the deliverable with respect to the following key aspects:

- Structure, format and appearance (if complies with the deliverable template in Annex A or not)
- Attachments (check if all necessary accompanied documents are attached as Annexes)
- English proofreading (if the situation requires it or not)
- Overall quality (acceptable level that meets the specifications/standards that have been set for the project and/or document, where relevant, exclusively based on the personal judgment/advice of the reviewer)
- Completeness (to what extent the deliverable includes all required contents as per the Description of the Action - DoA)
- Internal coherence (ensuring that no major contradictions can be detected in the structure and contents of the deliverable)
- External coherence (cross-checking that no major overlaps exist between this and other deliverables of the project)
- Accordance with the timetable (delivery date being in line with the contractual one)
- Need for additional review (for example, because the review team missed the necessary competencies)
- Free text comments

Having received the feedback, the responsible Partner for the deliverable will take all the necessary actions and upload a new (final) draft to Google Drive a few days before the official deadline, in time for the PM to perform the final formal checks and do the submission.

During this process, any Partner is free to step in, at any stage, with informal comments and contributions to that Deliverable preparation.

6.2.1 Document templates

To ensure the high quality of all the project's documentation (both internal and external), the project management has provided templates of documents that shall be used by all partners. The templates have been stored in the ['04-Templates and Logo'](#) folder.

The deliverable template is provided both in Google Docs and MS Word format. When working on a deliverable, the deliverable lead shall always start with the Google Doc template for efficient collaboration with other contributing partners and reviewers (please make first a copy of the template before starting to edit it). Only at the end for the final formatting, the deliverable will be downloaded and final-formatted in MS Word (inserting index of tables/figures, headings formatting, inserting landscape-oriented pages, etc.)

A project presentation template and a meeting minutes template are available as well.

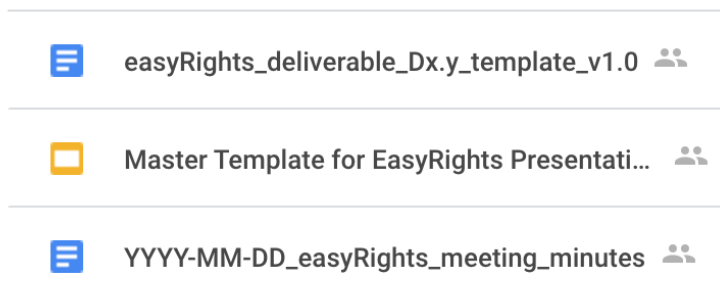


Figure 16: Document templates

6.2.2 Naming and versioning rules

Document naming principle for the working version of each deliverable is as follows: EASYRIGHTS Deliverable DX.Y_vX.Y. The format of the file should be in Google doc and located in the relevant WP folder in Google Drive.

- For example: easyrights_D8.1 _v0.1

Document naming principle for the final version of each deliverable is as follows: EASYRIGHTS Deliverable DX.Y. The format of the file should be in PDF and stored in the folder [05-Final Deliverable PDF](#) in Google Drive.

- For example: easyRights_ D8.1_v1 .pdf

7. IPR, open access and data management

As stipulated in the EASYRIGHTS Consortium Agreement and confirmed during the project KOM in Brussels, all the scientific and operational products delivered by the project will be released as Open Source and/or to the Public Domain under the Creative Commons Shared Alike 4.0 rule. This has been reflected into a copyright clause add to the deliverable template (including this one).

Having the Consortium adhered to the Open Access principles and rules of conduct, a Data Management Plan will be delivered in month 6 and revised in two subsequent editions until the project's end.

As a general rule, the individual persons mentioned as authors of a Deliverable will be acknowledged as co-authors of all contents and therefore holders of the IPR in relation to them, unless specific provisions are included in the body of the text.

References

EASYRIGHTS (2019) Description of the Action.

EASYRIGHTS (2019) Consortium Agreement based on the DESCA model.

Appendix A-Template of easyRights Deliverables



DELIVERABLE

DX.Y Title of the deliverable

Project Acronym:	easyRights	
Project title:	Enabling immigrants to easily know and exercise their rights	
Grant Agreement No.	870980	
Website:	www.easyrights.eu	
Deliverable Type:	OTH (Other)	
Version:	1	
Date:	dd mm yyyy	
Responsible Partner:	Partner name	
Contributing Partners:	Partner1, Partner 2, ...	
Reviewers:	First and last name (partner short name),First and last name (partner short name), First and last name (partner short name)	
Dissemination Level:	Public	X
	Confidential – only consortium members and European Commission Services	

Revision History

Revision	Date	Author	Organization	Description
0.1	dd/mm/yyyy	name	name	Initial draft
0.2				
...				
1.0				Final Version

Statement of Originality

This Deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgment of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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Executive Summary

<This is a one to two-page max summary of the deliverable. It should be able to act as a standalone piece of content and contain all the core messages from the rest of the deliverable>.

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1. Introduction

<This section should set the context for the deliverable, providing some background and outlining to the reader what the report will contain.>

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- Bulleted list
 - Sub bullet list
 - Sub sub bullet list

Table 1: xxx

Column Heading					
Table text	Table text				

Example Figure

Figure 1: xxx

3. Conclusion

<This conclusion should outline the main findings from your work, how they impact the rest of easyRights, and what further actions will be undertaken.>

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¹ Lorem ipsum dolor sit amet, nisl amet placerat,

Copyright clause



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- Aalborg University, Department of Architecture, Design and Media Technology (AAU)
- Fondazione LINKS - Leading Innovation & Knowledge for Society (LINKS)
- Comune di Palermo (PMO)
- Birmingham City Council (BCC)
- 21C Consultancy Limited (21C)
- Municipality of Larissa (LAR)
- Panepistimio Thessalias - University of Thessaly (UTH)
- Universitaet für Weiterbildung Krems - Donau Universitaet Krems (DUK)
- Norges Teknisk-Naturvitenskapelige Universitet (NTNU)
- Institute of Entrepreneurship Development (IED)
- BIC Euronova SA (BIC)
- Capeesh (CAP)
- Christar International Inc. (CHR)

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