



Platform for widespread uptake of certified, accessible and easy-to-use AAL mobile apps in Europe

AAL Agreement: AAL-2014-073

D1.2. – Project Handbook

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v.1.	16/02/16	Guidelines on how the project will be run, duties and rights of the participants
v.2.	1/03/17	Deliverable names

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1. Introduction

This document reflects the structure of the modes of communication, to better the overall view on the work at hand and strengthen cooperation. It also contains information about file storage and retrieval, templates and details about deliverables. This deliverable is a '**living document**' and will be changed from time to time to reflect current practice in the zocaalo project. The canonical version of the project handbook will be available in the Google Drive shared file space and changes to the document will be documented as well as the rationale for the changes

2. Communication

In this chapter the different means of communication are generally discussed. The time frames and file formats/templates have been left out of this chapter, but the necessary references are made to where this information can be found.

2.2 Forms of communication

2.2.1 Meetings

Because meetings are held regularly and involve a group, they are likely to benefit from a set framework. To confusion and conserve time these guide lines should be used.

An agenda / minutes file name format is discussed in paragraph 4.3.

2.2.2 Phone discussions / conferences

The phone is not just used as a one-on-one means of communication, but also for phone meetings between multiple persons. Like all other meetings there will have to be a chair, a minutes secretary and an agenda. For these purposes 'phone' can mean SKYPE (and SKYPE like applications)

The agenda will be structured as usual. The notice time for agenda and contributions might have to be shorter, in case the meeting does not have the necessary notice time upfront.

2.2.3 One on one

In order not to impose unnecessary information/communication onto one another ZOCAALO communications should be tailored to keep the distribution of messages to the group limited. Mail to groups should be sent only when needed, and to the smallest group or sub-group needed. In this way the impact is biggest and time spent on communications is, kept to the minimum.

3. Planning Meetings, Reports, and Deliverables

3.1 Meetings schedule

The table below describes the planned meetings of the consortium according to the Description of Work, the Consortium Agreement and AAL documents.

Table 1 - Scheduled ZOCCAALO meetings

Meeting title	for who	when
Monthly	Consortium, technical, quality	27/02/2017
		27/03/2017
		27/04/2017
5 month status	Consortium, technical, quality, Steering Group (executive board)	05/2017
Mid-term review of the project (physical review)	AAL /CMU	06/2017
Monthly	Consortium, technical, quality	TBD
Final F 2 F	Consortium, technical, quality	09/2018

3.2 General planning

The DoW and the “PMs per task per WP spreadsheet” (in the GOOGLE DRIVE Description of Work folder) reflect the current central planning for all the work packages, meetings and such. This document is assembled by the coordinator, and constructed with the aid of the WP leaders.

Within each Work Package the WP leader is responsible to have a practicable planning of that specific WP and the communicating it to the coordinator.

When the specific work package links directly to another package/project it is compulsory to synchronize the planning of the separate WP’s. Even though there might be a difference the detail of the planning of the separate WPs, this linking should facilitate harmonizing schedules. This process of synchronizing involves all those WP leaders concerned and may be initiated by the coordinator.

3.3 Project Reports

Below is a list of all reports that are due from ZOCCAALO to funding bodies

Table 2 - ZOCCAALO Report Schedule

REPORT	FOR WHO	FOR DATES	DUE
Project handbook	CMU – D1.2	n/a	02/2017
Web site	All	n/a	03/2017
Annual progress and financial report - including all deliverables due that period	CMU / NCP	9/14 - 12/15	02/2016
Annual progress and financial report - including all deliverables due that period	CMU / NCP	1/16 - 12/16	02/2017
Mid term physical review	CMU	9/14 - 12/16	06/2017
Annual progress and financial report - including all deliverables due that period	CMU / NCP	1/17 - 12/17	02/2018
A final report about achievements and financial data	CMU/NCPs	9/14 - 9/18	09/2018

3.4 Timing constraints for documents and meetings

In order to prevent large time laps due to communication hazards it is good to structure the time path of the interactions. This part includes both the time path of the review, communicated data and meetings.

3.4.1 Documents and deliverables

Every partner should be informed about new documents that contain information that impacts the whole consortium. With consortium documents, deliverables and reports, every consortium partner should read them before release. The critical factor is time. In order to enable everyone to have the time to review documents notice in advance need to be given before sending the actual document.

The table below shows the timelines for the review of documents. By using this model all of the consortium can do reviewing. By giving partners notice upfront to the documents that will be sent he/she can already plan the upcoming review work. Added to the mail with the notice time there should be stated the date of release and an estimate of the number of pages.

If a document is sent before it is due the partners have extra time to finish the reading. If the document is placed on the server at a later date than expected, the reviewers will have to use the response time that is prescribed (respecting available contractual deadlines).

3.4.2 Meetings

All official meetings should be organised and reported as prescribed. This protocol is needed to give all of those involved ample time to fully participate. The follow time path should enable anyone to react to documents and agreements. The hosting partner is responsible for taking the meeting notes.

Table 3 - Meetings scheduling phases

Time span for phases for meetings from Date Choice to Minutes		
Time line	Time to next action	Until the meeting
Pick a date for meeting	1 workday before announcement of contributions	5 workdays or more
Announcement of the contribution	1 workday before draft agenda	4 workdays
Draft agenda	1 workday before final agenda	3 workday
Contents of the contributions	2 workdays before meeting	2 workdays
Final agenda	1 week before meeting	1 week
Meeting		
Draft minutes	1 workday to partners response to minutes	1 workday
Partners response to minutes	1 workday to pre-final	2 workdays
Pre-final minutes (including merging of response)	1 workday to last response to minutes draft	3 workdays
Incorporate response to pre-final	1 workday to final	4 workdays
Final minutes		5 workdays

3.5 Publications and IPR

To make sure no IPR sensitive information is published, all publications (articles, papers etc.) should be uploaded to the GOOGLE DRIVE upon submission, and an email sent to the ZOCCAALO 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 will be assumed that the partners have



accepted that the document and it will be published at the appropriate dissemination level. Final versions of publications should be uploaded to the GOOGLE DRIVE folder into the publications folder.

4. Protocols for written documentation

Publicly funded projects run on producing documents.

4.1 Software

The partners to this project operate in a variety of work domains. Tools used in one domain may not be typical in others. In order to insure a good exchange of digital information the choice of software is such that it can be expected that everyone will be able to read it.

- Microsoft Word
- Microsoft Excel
- Microsoft PowerPoint
- Open Office
- PDF files
- JPG files
- PND files
- HTML files

4.2 Naming convention for ZOCAAALO documents

In order to keep an overview of the work, each document will be coded. This code should be given as a name to the document and included in the report. Besides that it is written in the document in the information overview on the first page, it is also at the bottom of each page in the footer (see section 4.4).

To generate the name of a file do the following:

Deliverable example for D2.1

Versioning: Document version is listed in the document itself. The full name, consisting of the parts given here, should be displayed as: D2.1_Deliverable Name_V.x

Deliverables will be named according with zocaalo proposal and in case of 1 deliverable contains other, refers in the same document the deliverables that includes.

For documents that are not formally numbered the file name needs to be sufficiently descriptive to allow easy retrieval. Examples:

- *A file containing references for a deliverable may be named refs_for_D.3.doc (note under line instead of space)*

This naming convention applies to final deliverables, draft deliverables and documents.

4.3 Template and name file name and contents for minutes

A template for meeting agenda and minutes is provided on the template section of the GOOGLE DRIVE with the goal of making meetings decisions easy to track and implement.

In order provide ease in identifying meeting records, each document's name will be coded in a similar fashion to the others. This code should be given as a name to the document and included in the report. It should be in the document, in the information overview on the first page, it is also at the bottom of each page in the footer (see paragraph 4.5.3).

Date expressed as year (2 digits), month, day:
example September 8th 2017 : 08.09.17

Name/subject should be short descriptive name, easy to identify notes long after the meeting has taken place:
Example: Meeting_080917

4.4 Protocol for deliverables

4.4.1 Procedure

The Work Task Leader (WTL) is the editor of the deliverable. This means that he/she is responsible for the contents and the presentation of the draft version, and the final product (after the review). The WTL is also responsible for the announcement of any up coming document, both for the notice time as well as at the time of placing. Drafts are uploaded to GOOGLE DRIVE.

Following procedure is suggested:

1. WTL puts skeleton of the Deliverable on GOOGLE DRIVE
2. WTL receives comments
3. WTL puts Deliverable in draft on GOOGLE DRIVE with 1 week to 10 days time for commenting (see previous table)
4. WTL puts draft final on GOOGLE DRIVE 2 weeks before delivery date
5. WTL sends the document for review
6. WTL finalises and hands over to the coordinator so that the document can be submitted on time

4.5.3 Templates

ZOCAALO has templates for the documents that are often generated. The section below presents them.

4.5.4 Basic word template

A basic template is stored in the GOOGLE DRIVE. The name of the template is 'ZOCAALO.dot'. This might be useful for instance for internal documents, that later on



need to be combined to an official document. This might prevent the strange reactions that Word sometimes has to the combining of different files that are made with the use of multiple templates.

Word template in detail

Font	Arial
Size	11
Style	Normal (that is what it should say in the box next to the font)
Outlining	Outlining of the text should be 'aligned to the left'.
Headings	Classical (the use of the template is recommended) So do not make headings by scaling the size of the letters, but change the name in the box that says 'normal' to 'heading 1, 2, or 3'. Heading 1 Arial, 16 pt, bold blue Heading 2 Arial, 13 pt, bold blue Heading 3 Arial, 12 pt, bold blue
Language	English U.K.
Contents list	Automatically made

4.5.4 PowerPoint Template

A template for PowerPoint project presentation can be found at: [ZOCAALO.dot](#)

4.5.6 Deliverable template

A template for ZOCAALO deliverables can be found at: [ZOCAALO deliverable.dot](#)

4.5.7 Meetings agenda and minutes template

A template for ZOCAALO meetings can be found at: [ZOCAALO meeting and agenda template.dot](#)

5. Annex A: The GOOGLE DRIVE server

All GOOGLE DRIVE documents are accessible in the document storage. It is structured hierarchically by categories in folders. Furthermore, you can add keywords and a description to each category supporting the appropriate filing and quick retrieval of documents. The description and contents of a category is presented on the GOOGLE DRIVE page.

Tips for using the GOOGLE DRIVE

- Click on documents to open
- Drag documents into mail to send link
- 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.