



EDISON
building the data
science profession

D1.1 Project Handbook

Project acronym: EDISON

Project full title: Education for Data Intensive Science to Open New science frontiers

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Executive summary

The Project Handbook (PHB) is a public report that describes the project organisation and internal procedures of the EDISON project with regard to day-to-day communication and progress towards the timely delivery of the deliverables and within budget. It shall be used by all partners for all deliverables to be submitted the European Commission (EC) and for document exchange and communication between partners.

The Handbook describes the following procedures in the project:

- Management and decision-making structure
- Document management, including:
 - File naming conventions
 - Documents versioning convention
- Quality assurance procedure of deliverables
- Project communication mechanisms
- Tracking of work plan and budget implementation, including:
 - Reporting (internal and official) procedure
 - Person months' monitoring procedure

1 Introduction

1.1 Purpose

The Project Handbook (PHB) describes the project organisation and internal procedures of the project with regard to day-to-day communication and progress towards the timely delivery of the deliverables and within budget. This document provides the information needed to facilitate the monitoring of the overall progress and the communication between project partners and the European Commission (EC).

The PHB specifications shall be used by all partners for:

1. All deliverables to be submitted to the EC;
2. Document exchange and communication between partners.

1.2 Maintenance and distribution

This PHB is issued at the end of Month 1 and will be updated as deemed necessary. The Project Manager (PM) is responsible for its maintenance and updating. It will be downloadable by the public from EDISON web site and by project partners from the EDISON Google Drive shared folder (Deliverables submitted => WP1). Information concerning updates will be duly sent to all partners.

1.3 Reference documents and list of procedures

Reference documents:

1. EDISON Grant Agreement (GA)
2. EDISON Description of the Action (DoA)
3. EDISON Consortium Agreement (CA)

This Handbook is based upon and complements the above-mentioned documents. For any inconsistency, the provisions contained in the above-mentioned documents prevail.

This Handbook describes the following procedures in the project:

- Management and decision-making structure
- Document management, including:
 - File naming conventions
 - Documents versioning convention
- Quality assurance procedure of deliverables
- Project communication mechanisms
- Tracking of work plan and budget implementation, including:
 - Reporting (internal and official) procedure
 - Person months' monitoring procedure

2 Project Management Structure

In this section the Project Management structure of the project is described.

The Project governance is ensured by the coordinated actions of various groups and boards, all monitored by the Coordinator's team:

General Assembly (GA)
 Project coordination team
 Project Management Committee (PMC)
 Work Package Leaders (WPLs)

2.1 General Assembly (GA)

The General Assembly (GA) is the highest and final decision-making body of the project on the side of the consortium. It is made by one member of each beneficiary and is chaired by the PC.

The decisions to be taken by the GA, according to the consortium agreement, include:

- Content, finances and intellectual property rights
 - Proposals for changes to Annexes 1 and 2 of the Grant Agreement to be agreed by the EC
 - Changes to the Consortium Plan
 - Modifications to Attachment 1 (Background Included) of the CA
 - Additions to Attachment 3 (List of Third Parties for simplified transfer according to Section 8.2.2) of the CA
 - Additions to Attachment 4 (Identified Affiliated Entities) of the CA
- Evolution of the consortium
 - New parties
 - Declaring Defaulting Party(ies)
 - Proposal to the EC for a change of the Coordinator, suspension of all or part of the, termination of the Project and the CA
- Appointments
 - Appoint the members of the PMC, upon a proposal by the Coordinator.

The members of the GA, at the time of writing, appointed by each beneficiary, are the following:

n.	Name	Surname	Organisation	Country	Role
1	Yuri	Demchenko	UvA	NL	Chair
2	Tomasz	Wiktorski	UiS	NO	Member
3	Jeremy G	Frey	Southampton	UK	Member
4	Matthias	Hemmje	FTK	DE	Member
5	Yannick	Legré	EGL.eu	NL	Member
6	Andrea	Manieri	ENG	IT	Member
7	Ruben	Riestra	INM	ES	Member

2.2 Project coordination team

The Project coordination team consists of the Project Coordinator (PC), Dr. Yuri Demchenko, and the Project Manager (PM), Ms. Manuela Corsini.

The role of the PC is to ensure that the project plan is executed in fulfillment of the grant agreement with the EC.

The PC's tasks include:

- Acting as the contact point with the Project Officer of the EC (if possible and useful delegated to the PM for operational issues)
- Acting as main point of contact (with regard to technical content and coordination) between the project and other related projects and organizations
- Coordinating the project activities
- Ensuring the implementation of the work plan
- Preparing and supporting the decision making process
- Coordinating the reporting
- Monitoring the legal processes

The PM has the role to assist the PC in ensuring that the project work plan, milestones, and time scales are maintained according to the specifications of the DoA.

The PM's tasks include:

- To assist the PC in the interface with the EC
- To assist in the preparation and submission of all deliverables, project reviews and reports to the EC
- In collaboration with the PMC, to help the PC monitor the progress of the work plan's implementation
- To act as main administrative point of contact between the EDISON project and other related projects and organizations
- To assist the PC in ensuring that all IP used or generated by the project is managed in accordance with the CA

2.3 Project Management Committee (PMC)

The Project Management Committee (PMC) is the executive body of the project and provides assistance to the PC for executing the decisions of the GA. It supports the day-to-day management of the project and assists and facilitates the work of the PC and the GA.

The PMC is proposed by the PC and appointed by the GA. It is chaired by the PC and composed of the Work Package Leaders and selected task leaders.

The PMC has been appointed at the first GA meeting, as follows:

n.	Name	Surname	Organisation	Country	Role
1	Yuri	Demchenko	UvA	NL	Chair
2	Tomasz	Wiktorski	UiS	NO	Task Leader
3	Steve	Brewer	Southampton	UK	WP Leader
4	Matthias	Hemmje	FTK	DE	WP Leader
5	Tiziana	Ferrari	EGI.eu	NL	WP Leader
6	Andrea	Manieri	ENG	IT	Task Leader
7	Ruben	Riestra	INM	ES	Task Leader

2.4 Work Package Leaders (WPLs)

Work Package Leaders (WPLs) have been formally appointed by the GA at the first GA meeting, based on a proposal from the partner responsible for the WP and the approval by all the members of related work package.

Their tasks and responsibilities include:

1. **Technical Work:** the WPLs are responsible for proposing and monitoring the detailed planning and execution of the technical work to be carried out in their respective work package. Each WPL reports to the PMC ensuring that the objectives and milestones of the whole work package are met in time, quality and budget.
2. **Timeliness:** the WPL is responsible for the timely delivery of the work carried out in its work package. WPL is responsible of the completion and submission on time of deliverables.
3. **Information Flow:** the WPL will on a regular basis, or when requested to do so, prepare short reports to the PMC. Each work package member will attend meetings within the project and where relevant also external meetings.
4. **Interfacing with other work packages:** The WPLs, throughout the PMC, are responsible for technical collaboration on the interface to other work packages.

3 Document Management

3.1 EU funding acknowledgement and disclaimer

All publications and any other dissemination material relating to the results of EDISON should include a statement to indicate that this result was generated with the support of funding from the European Union.

Any dissemination of results (in any form, including electronic) must:

- display the EU emblem (when appropriate)
- Include the following acknowledgement: “This (*project/work/article*) has received funding from the *European Union’s Horizon 2020 research and innovation programme* under grant agreement No 675419 (EDISON project)”.
- Include the disclaimer: “This (*publication/report*) reflects only the author's view and the European Commission is not responsible for any use that may be made of the information it contains.”

3.2 File naming conventions

Each document shall be uniquely identifiable together with its version. See the table below for the way to name files. Other document types should also follow this logic.

Document Type	Convention	File Name example
Deliverables	EDISON D[WP#].[D#]_[Short Title]_[version#]	EDISON D1.1_Project Handbook_v01.doc
Meeting Minutes/agenda, etc.	EDISON [type of meeting]_[type of document, e.g. agenda, minutes, etc.]_[version#]	EDISON Kick-off meeting_agenda_v01.doc
Presentation	EDISON [name of conference]_[short topic]_[version#]	EDISON ICT2015_project overview_v01.ppt
Periodic Report	EDISON Periodic Report #[period#]_[version#]	EDISON Periodic Report #1_v01.doc

For versioning please refer to the following paragraph.

3.3 Documents versioning convention

Using consistent document versioning is very important for effective collaborative work.

The following basic principles apply:

- 1) Document versions should clearly indicate the progress from initial version to the final and allow documents ordering by version number.
- 2) Version number typically is appended to the basic file name.
- 3) Different version numbering can be used: either simple numerical like “-v00.doc”, “-v01.doc” (“-v0.0.doc”, “-v0.1.doc”) or by date “-v20120110.doc” (note that you should use date format YYYYMMDD to allow predictable ordering).

- 4) In case of numerical version numbering, consider version 1.0 as a final version, and all previous draft versions are numbered as 0.1 (or suffix as –v01), 0.2 (or suffix as –v02), etc

The procedure foresees the identification of a document owner, main author or editor (DocEditor). He/she is responsible for consistent versioning, updating the document and issuing new versions, as follows:

- 1) DocEditor prepares initial and following document versions and posts them to working directory. Every next reviewer or contributor, adds comments, corrections and uploads/posts it back adding own initials or organisation acronym to the file name like “-yd” or “-uva”, or content related like “-section1.2”
 - a. If the next contributor or reviewer continues previous review, he/she adds own initials at the end, e.g. –yd-sf.doc
 - b. If a reviewer/contributor updates own comments in the same version, he/she adds sequential number, e.g. –yd01, yd02
 - c. However, chaining of initials and comments as in a.) and b.) should be limited
- 2) DocEditor revises the document and assigns a new version number by changing/modifying version in the file name (also removing previous reviewer’s initials).

3.4 Project templates

All partners will use standard document templates in order to apply a consistent look for all project documents. One generic document template will be provided and several specific templates for particular documents such as deliverables, Periodic Report etc. The templates will be available on the EDISON Google Drive shared folder.

The generic document template will follow the guidelines given by the EC and will contain the following:

- Layout of the title page
- Layout of headers and footers
- Styles that are to be used in the documents

Templates foreseen:

- Periodic Report
- Deliverables
- Presentations

3.4.1 Structure of deliverables and reports

Each document for reporting and for deliverables shall follow the guidelines given by the EC and shall contain the following elements:

- Project logo
- Project number

- Project Acronym
- Project title
- Title of Report
- Period covered from ... to (if relevant)
- Dissemination level (i.e.: public or confidential)
- Date of preparation
- Editor and reviewers
- Revision history
- EU funding acknowledgement and disclaimer

The structure will be the following:

- 1) Cover page
- 2) Table of content
- 3) Executive summary (max 1 A4)
- 4) List of contributors, their role, description of on-going work
- 5) Main body of the report, consisting in an appropriately titled chapter
- 6) Conclusions
- 7) References (if applicable)
- 8) Acronyms (Can be at the beginning or at the end)
- 9) Appendices (contain all the technical details, e.g. a paper)

The table of content should be designed as a teaser to promote interest in actual reading the document.

The executive summary should include a summary description of the results of the work carried out and conclusions, highlighting the contribution of the results of the deliverable for the achievements of project objectives, and specific impacts to be derived from the actual usage of such results (Deliverable's Value Proposition).

By reading the executive summary and main body, readers must be able to assess the content of the deliverable, and must also be able to assess that the deliverable reflects the contractual obligations as laid down in the DoA. If needed, the reviewer can choose to read the full appendix to assess all details.

3.5 Document repository

For the purpose of storage and internal exchange of files and documents, EDISON relies on a shared EDISON folder on the Google Drive, to which all project members have access. The Google Drive folder is managed by the PC and the PM. New consortium members will receive the Google Drive invitation from the PM.

EDISON website at <http://www.edison-project.eu/> will host the public repository intended for the project deliverables, published publications and all other dissemination materials.

4 Quality assurance procedure of deliverables

The quality assurance procedure of deliverables is included in EDISON DoA and it was further established during EDISON kick-off meeting. In particular, for each deliverable, a specific responsible person (editor) and 2 internal reviewers were identified (see following table).

Del. No	Deliverable title	Delivery date	Dissemination level	Resp partner	Editor	Reviewer 1	Reviewer 2
D1.1	Online project handbook	M01	PU	UvA	Manuela	Ruben	Steve
D5.1	EDISON Dissemination and Engagement Plan and material	M03	PU	South	Steve	Sy	Wouter
D2.1	Data Scientist Competences and Skills Framework (CF-DS) and BoK definition (first version)	M06	PU	UvA	Adam	Holger	Malgorzata
D2.2	Existing educational and training resources inventory and analysis	M09	PU	UiS	Tomasz	Jana	Malgorzata
D1.2	Register of IPR licenses	M12	PU	UvA	Wouter	Sy	Andrea
D3.1	Model Curricula definition and Report on the Use Cases support design	M12, M24	PU	FTK	Holger	Boro	Andrea
D4.1	Strategic market analysis	M12, M24	PU	INM	Ruben	Steve	Yuri
D4.2	Certification scheme plan	M12, M24	PU	EGI.eu	Malgorzata	Wouter	Russel
D5.3	Liaison Group and other public engagement activities	M12, M24	PU	South	Steve	Matthias	Tiziana
D3.2	EDISON Online Education Offering	M12, M24	PU	EGI.eu (UKIM)	Boro	Steve	Tomasz
D5.2	Update of Dissemination material	M15	PU	South	Steve	Yuri	Andrea
D2.3	Final versions of the DS-BoK definition, competence framework (CF-DS) and resulting eCF compliant Data Scientist profile	M22	PU	ENG	Andrea	Holger	Steve

	definition						
D1.3	Report about the mechanisms to sustain the IPR management	M24	PU	UvA	Wouter	Ruben	Sy
D4.3	Sustainability plan and implementation.	M24	PU	ENG	Andrea	Wouter	Jeremy
D4.4	EDISON Educational Model roadmap	M24	PU	UvA	Yuri	Tomasz	Jana

This file is also saved on EDISON Google Drive folder (Deliverables submitted => Deliverables and milestones list_editors and reviewers.xlsx)

The editor is responsible for the deliverable's structure, the editing and submission of the final deliverable to the internal review process. The deliverable editor will check the following points:

- The deliverable covers the stated objectives;
- The quality of the work described in the deliverable is of high standard and is in accord with what is expected;
- The quality of the writing of the document is of high standard, with respect to style, errors, organization; readability, and illustrations;
- The deliverable is complete, i.e., there are no missing parts, missing references, missing explanations of concepts;
- The deliverable is clearly written and understandable by its potential readers.

The internal reviewers selected are members of the consortium, possibly coming from 2 different work packages, both of which have not been directly involved in the work described in the deliverable.

The procedure foresees the following steps:

When	What
>8 weeks before deadline	The editor outlines the structure of the expected content.
5-8 weeks before deadline	The editor involves other beneficiaries , monitoring content production on time and of high quality. The editor integrates the contributions from other project partners.
4-5 weeks before deadline	The editor carries out the final editing (using the project template) and submits the deliverable to the PMC .
4 weeks before deadline	The PMC starts the internal peer review, by sending the deliverable to the 2 assigned internal reviewers .

3-4 weeks before deadline	The 2 internal reviewers read the submitted deliverable and suggest changes where necessary to the PMC (or accept document as it is).
3 weeks before deadline	The PMC asks the editor to take on board the suggested changes
2-3 weeks before the deadline	The editor revises the deliverable on the basis of the internal reviewers' comments and sends it back to the PMC
1-2 weeks before deadline	The PMC confirms the readiness of the deliverable for the submission
0-2 days before deadline	The PMC informs the GA and makes the deliverable available via EDISON shared Google Drive (Deliverables submitted => WP#)
0-2 days before deadline	The PMC submits the deliverable to the EC , through the coordinator .

5 Project Communication Mechanisms

5.1 EDISON meetings and teleconferences

Within EDISON, the following meetings are foreseen:

- Project (plenary) Meetings
- GA meetings
- PMC meetings
- Project coordination team meetings
- WP-level meetings

5.1.1 Project (plenary) meetings

Being a fast-paced project, EDISON (face-to-face) project meetings have been foreseen to take place every 3-5 months, in order to continuously ensure the interaction among work packages and proper discussions which cannot be guaranteed through tele-conference.

The kick-off meeting has already taken place, at the time of writing, in Amsterdam on 09-10 September 2015 and a schedule of the next meetings has already been defined, as follows:

Title	Date	Location	Organising partner	Status	Notes
Kick-off meeting	09-10 September 2015	Amsterdam (NL)	UvA	done	
Partner meeting #2	25-27 January 2016	Rome (IT) or Brussels (BE)	ENG		
Partner meeting #3	end of June/first week of July 2016	Southampton (UK)	Southampton		tbc
Partner meeting #4	November 2016	tbd			
Partner meeting #5	February 2017	Brussels (BE)?			In connection with the mid-term review meeting
Partner meeting #6	June 2017	tbd			
Partner meeting #7	August-September 2017	Brussels (BE)?			In connection with the final review meeting

The updated calendar is also uploaded on EDISON Google Drive (Project meetings and telcons => Partner meetings => EDISON Partner (plenary) meeting calendar.xls).

The detailed scheduling of meetings will always be done in advance to allow maximum participation (at least 2 meetings in advance).

The location of the events will change every time, and other project events will be annexed to the project meetings as much as possible.

Agenda and minutes are produced for each meeting and saved in the project folders.

5.1.2 GA meetings

The GA met for the first time in Amsterdam on 09 September 2015 (back-to-back with the kick-off meeting).

The GA will meet face-to-face on the occasion of the project meetings, whenever there will be issues to be discussed. The meetings' calendar is uploaded on EDISON Google Drive (Project meetings and telcons => General Assembly meetings => EDISON General Assembly meeting calendar.xls).

Agenda and minutes are produced for each meeting and saved in the project folders.

5.1.3 PMC meetings

The PMC will meet online every 2 weeks (the 1st and 3rd Wednesday of each month). A calendar has already been established until the end of the project and calendar invitations have already been sent out. The calendar is also uploaded on EDISON Google Drive (Project meetings and telcons => Project Management Committee meetings => EDISON PMC meeting calendar.xls).

Meetings will be based on WebEx facilities.

Agenda and minutes are produced for each meeting and saved in the project folders.

5.1.4 Project coordination team meetings

The PC and the PM meet face-to-face every 2 weeks at UvA. When required, other people from UvA join the meeting.

5.1.5 WP-level meetings

Meetings (both online and face-to-face) take place continuously throughout the project duration at the level of work packages and specific tasks. The meetings are organised by the WP leader or the Task Leader.

5.2 Mailing Lists

A dedicated mailing list has been set up to support the project communication: edison-h2020@list.uva.nl, which includes all scientific, technical and administrative consortium members working on the project.

The PM however created specific mailing lists for the different management bodies (GA, PMC) and the partners' administrative, financial and legal teams.

To prevent an avalanche of unsolicited messages, senders are strongly recommended to target their messages carefully to the narrowest audience as reasonably possible.

5.3 List of contacts

The PM is in charge of updating the consortium contact details' list, which reports, for each consortium member, the contact details, role in the project, mailing lists he/she belongs to, and governance bodies participated. This excel file is accessible by any consortium member at any time, being saved in the EDISON Google Drive (Admin docs => EDISON partner contact list.xlsx).

All partners will inform the PM of any change to be made to the excel file (e.g. changes in their contact details or contact persons), as well as of changes in any other information needed for executing the project.

6 Tracking of work plan and budget implementation

6.1 Reporting (internal and official)

EDISON's reporting periods are 2, as follows:

- 1) Month 1-18
- 2) Month 19-24

Therefore, official reporting to the EC will not be done before the last quarter of the project.

This is why an internal 6-monthly reporting has been foreseen to take place. Every 6 months, partners will be asked by the Project coordination team to submit a financial and technical report covering the 6 previous months (including person-months reporting). The reports submitted by each partner will then be evaluated by the Project coordination team against budget, work plan and person-months plan (see following paragraph). Corrective actions might be suggested to each partner if needed.

Partners will receive detailed instructions on how to perform this internal reporting well in advance.

6.2 Person months' monitoring

The Project coordination team will monitor the list of staff members working within the consortium. Every partner will communicate the list of staff working for EDISON throughout the lifetime of the Project to the PM. The workforce may change but the current Person Months (PMs) will be adhered to as much as possible by each of the partners in the WPs they are dealing with.

At the beginning of the project, partners will be asked to produce a 6-monthly person-months planning per Work Package. This planning will serve as a basis for evaluating the actual PMs declared by each partner at the 6-monthly internal reporting.

An excel file will be sent to partners at the beginning of the project to facilitate PMs planning.

7 Conclusions

This document has set out the practical organisation and procedures of the EDISON project. It is a reference document for the consortium members: all partners must read it and familiarise themselves with it.

The PHB is work in progress; based on experiences and needs in the consortium, the document will be continuously adapted and updated. Best practice will be incorporated and used to systematically improve the operational management of the project.