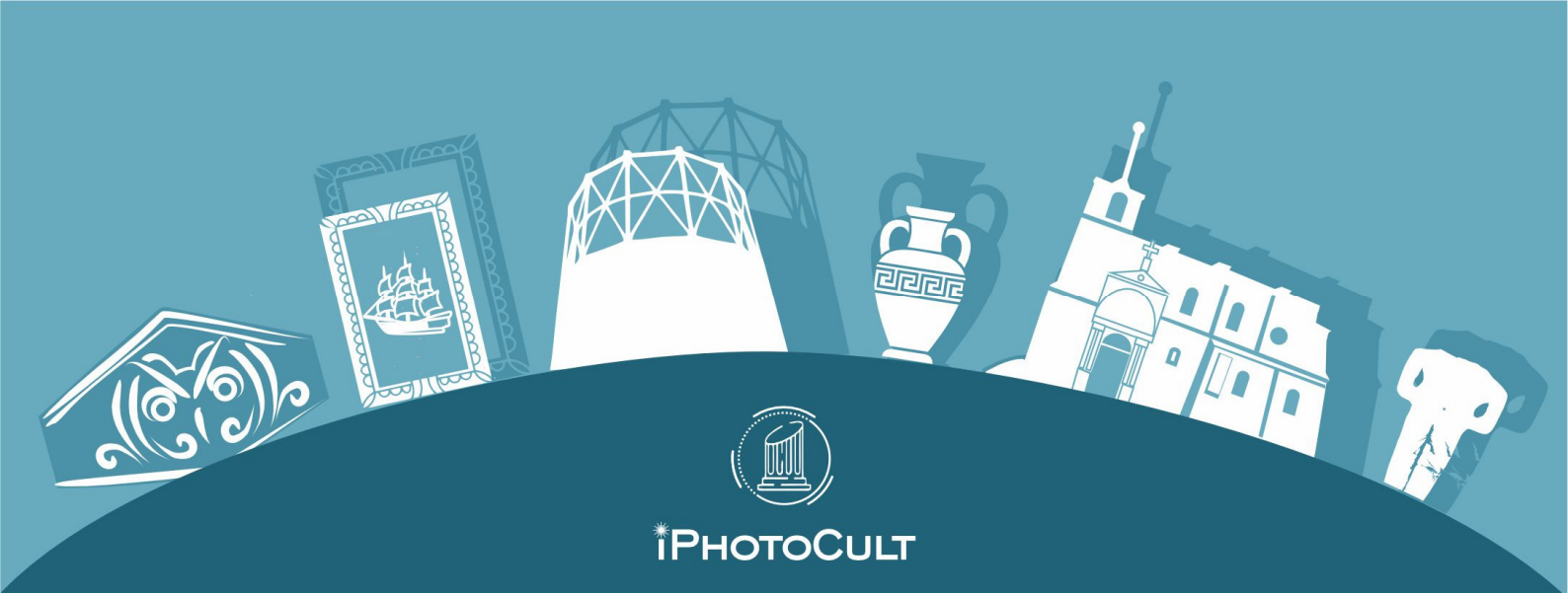

D1.1: Handbook & Documentation Standard

Revision: v.1.0

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Abstract	This document provides a handbook for procedures including project management, document repository, documentation standards and templates for deliverables and presentations, communication between partners and mailing lists, reporting with the EC and external communication with the public.
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Dissemination Level		
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Classified R-UE/ EU-R	*EU RESTRICTED under the Commission Decision No2015/ 444*	
Classified C-UE/ EU-C	*EU CONFIDENTIAL under the Commission Decision No2015/ 444*	
Classified S-UE/ EU-S	*EU SECRET under the Commission Decision No2015/ 444*	

* R: Document, report (excluding the periodic and final reports)

EXECUTIVE SUMMARY

The deliverable ''D1.1: Handbook and Documentation Standard'' outlines the internal procedures of the iPhotoCult project in terms of project execution, administrative management, management structures, communication and collaboration. It contains all relevant information for the Consortium partners to refer to during the project in order to complete and fulfil all project management, reporting, and communication tasks. In addition, it describes relevant tools to be used for reporting and management of the project.

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ABBREVIATIONS

CA	**Consortium Agreement**
DoA	**Description of Action**
EC	**European Commission**
GA	**Grant Agreement**
GeA	**General Assembly**
PC	**Project Coordinator**
PO	**Project Officer**
PMT	**Project Management Team**
WP	**Work Package**

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INTRODUCTION

The deliverable ''D1.1: Handbook and Documentation Standard'' deals with procedures that need to be known and followed by all partners. Information about the Project Management structure and the roles of each body, the main documents that define all aspects of the project (Grant Agreement and Consortium Agreement), the procedures to follow for preparing and submitting reports and deliverables to the European Commission, the communication means among the partners as well as to any external stakeholder (emails and mailing lists, meetings). Also, an appropriate document repository for collecting and sharing information as well as document templates are communicated.

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1 PROJECT MANAGEMENT

1.1 PROJECT MANAGEMENT STRUCTURE AND BODIES

An adequate project management structure is necessary for an effective collaboration among all consortium members and the Granting Authority. The organizational structure, bodies, roles and responsibilities of each partner are described in the Grant Agreement (GA) and the Consortium Agreement (CA). In Figure 1, the management structure is depicted.

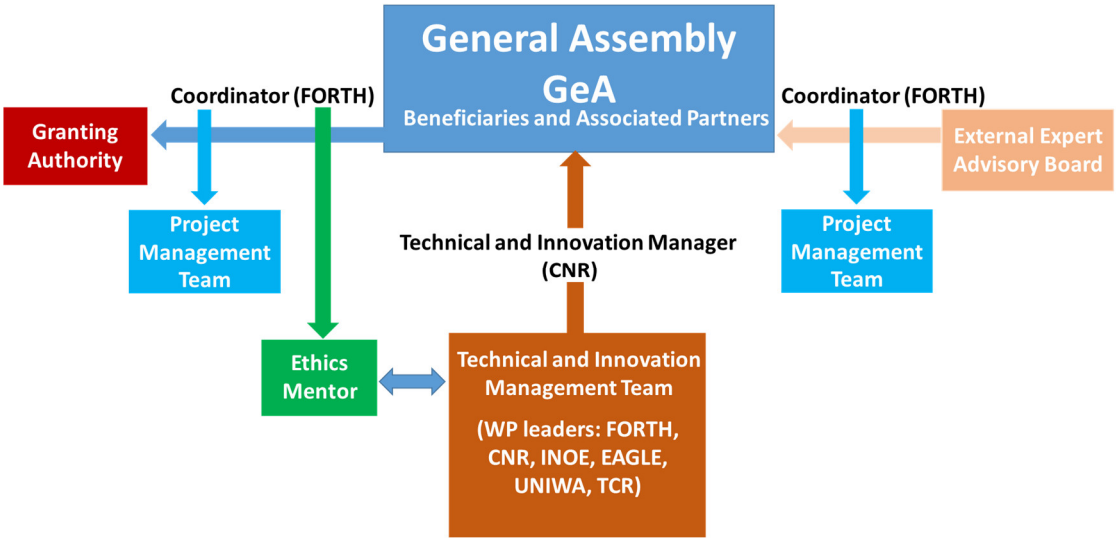

Figure 1: Management Structure of iPhotoCult

The General Assembly (GeA) is the decision-making body of the consortium and consists of one representative of each Beneficiary and Associated Partner. The Associated Partners are excluded from voting on and vetoing the financial changes to the Consortium Plan and the distribution of EU contribution among the Beneficiaries.

The Project Coordinator (PC), FORTH, is the legal entity acting as the intermediary between the Partners and the Granting Authority. The PC shall, in addition to its responsibilities as a Party, perform the tasks assigned to it as described in the GA and the CA via the Project Management Team (PMT).

An External Expert Advisory Board (EEAB) will be appointed and steered by the GeA. The EEAB shall assist and facilitate the decisions made by the GeA. The PC shall write the minutes of the EEAB meetings and submit them to the GeA. The EEAB members shall be allowed to participate in GeA meetings upon invitation but have no voting rights. The members of the EEAB, which were suggested at the kick-off meeting and have accepted the invitation are the following: Franco Niccolucci (director of VAST-LAB research laboratory at PIN, Prato, Italy), Marco Leona (Head of the Department of Scientific Research at the Metropolitan Museum of Art, New York, USA), Michel Menu (Professor, Director of STARC at the Cyprus Institute, Nicosia, Cyprus) and Marta Castillejo (Senior Research Scientist, Founder and Head of the Group «Lasers, nanostructures and materials processing» at CSIC, Madrid, Spain).

Technical, scientific and innovation management, ethics monitoring and risk analysis will be performed by the Technical and Innovation Management Team (TIMT) consisting of all the WP leaders. The TIMT will be led by CNR (Technical and Innovation Manager (TIM)).

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The coordinator appoints an Ethics Mentor, who will play a crucial role in overseeing the ethical aspects of the project, working closely with the TIMT to monitor and uphold ethical standards throughout all phases of the project. As Ethics Mentor has been appointed Dr. Anthi Ranella (Assistant Researcher at IESL-FORTH, full member of the Research Ethics Committee of FORTH).

The decision processes are described in the CA.

1.2 DOCUMENT REPOSITORY

A cloud server operates as a platform for storing and sharing all documents related to the project as well as project management information and collaboratively writing deliverables and other related documents. The server «resides» at IESL-FORTH (https://cloud.iesl.forth.gr) and all partners have access to it with a username and password. Sensitive data, if any, will be kept on internal servers of the project partners.

1.3 THE IPHOTOCULT GRANT AGREEMENT

In the context of Horizon Europe, the beneficiaries enter into a common GA with the European Research Executive Agency (under the powers delegated by the European Commission (EC)). The GA serves as the project contract for all iPhotoCult participants and defines all aspects of the Project related to payments, cost eligibility, funding ratios, documentation and financial audits. Beneficiaries need to adhere to the GA, which includes:

- Annex 1 – Description of the action (part A, part B)
- Annex 2 – Estimated budget for the action
- Annex 2a – Additional information on unit costs and contributions
- Annex 3 – Accession forms
- Annex 4 – Model for the financial statements
- Annex 5 – Specific rules

Annex 1 – Description of the Action describes the details for the project implementation. It includes: a) summary of the project, b) list of participants, c) detailed workplan and resources, c) deliverables and milestones, d) staff effort, e) critical risks, f) objectives, impact, results to be produced, g) dissemination and communication strategy, h) overall budget, i) role of each participant in the Project.

The GA can be found at:

1. The official portal of the EC – Participant Portal / Grant Management Services (login required): Participant Portal Grant Management Services (europa.eu)
2. The iPhotoCult cloud (see section 1.2).

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1.4 THE IPHOTOCULT CONSORTIUM AGREEMENT

The aim of the iPhotoCult Consortium Agreement is to establish guidelines that define the relationship between the Parties involved in the project. The CA is a private agreement between the Beneficiaries and the Associated Partners, to set out the rights and obligations amongst themselves and it does not involve the European Commission/Agency. The signature of the CA between the partners of a research project is mandatory.

The model CA to be followed is the DESCA (Development of a Simplified Consortium Agreement) model. It is a comprehensive model CA, which offers a reliable frame of reference for project consortia which enjoys broad support within the EU framework programme community.

Specifically, the agreement addresses how the work will be organised, how the project will be managed, and the rights and obligations of each party, such as liability, access rights, and dispute resolution. The CA defines the purposes and expectations of the parties involved, as well as their respective obligations and relationships according to the applicable law.

As soon as the iPhotoCult CA is signed by all project Parties, it will be accessed via the iPhotoCult cloud.

1.5 DOCUMENTS AND SOURCES OF IMPORTANT INFORMATION

Some important documents related to the Horizon Europe Projects and apply also to iPhotoCult can be found here:

- Annotated Grant Agreement: aga_en.pdf (europa.eu)
- Online Manual at the EU Funding & Tenders Portal: Online Manual - Online Manual - Funding Tenders Opportunities (europa.eu)

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2 REPORTS AND DELIVERABLES

2.1 TEMPLATES FOR DOCUMENTS

The PMT has created templates for deliverables, reports and presentations. All templates feature the colours from the iPhotoCult logo, the required acknowledgement for funding from the EC and disclaimer. The templates are available in iPhotoCult cloud repository, where the document structure and style of all documents related to the Project can be advised:

- Deliverable Template
- Presentation Template
- Meeting Agenda Template
- Meeting Minutes Template
- WP Reporting Template

2.2 REPORTING PERIODS AND PROCEDURES

Over the course of the Project, which spans over 42 months, there are three reporting periods, where an equal number of Project reviews occur (see GA/DoA – pg. 28). Sixty (60) days after the end of each reporting period, a periodic report should be submitted to the EC followed by a review meeting with the PO and the EC expected to take place 10 – 15 days after the deadline for the periodic report. In Table 1, the details about the reporting periods, dates and deadlines are shown.

Table 1: Reporting periods for iPhotoCult

Reporting Periods		Deadline for Periodic Report	Review Meetings
1st (M01 – M14)	01/06/2024 – 31/07/2025	30/09/2025	+/- 15 days after deadline
2nd (M15 – M28)	01/08/2025 – 30/09/2026	30/11/2026	+/- 10 days after deadline
3rd (M29 – M42)	01/10/2026 – 30/11/2027	31/01/2028	+/- 15 days after deadline

The template of the Periodic Report can be found here: periodic-report_horizon-euratom_en.pdf (europa.eu) and it includes the Technical Report (Part A and Part B) and the Financial Report.

The general procedure for the preparation and submission of the technical report (Part B) is outlined below:

- The PC requests from the WP leaders to report on their WP providing them with a reporting template.

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- The WP leaders collect input from the WP task leaders and fill out their corresponding part.
- The PC puts together the information from all WP and generates the periodic report.
- The report is reviewed by all partners.
- The PC revises and submits the report to the EC.

2.2.1 Periodic Technical Reporting

The periodic technical report includes a detailed description of the work that has been carried out during the corresponding periodic report. It provides an overview of the advancements towards the goals of the Project. It consists of Part A and Part B.

Part A is generated by the IT system. It is based on the information which is entered into the Portal Continuous and Periodic Reporting modules. It includes deliverables and milestones, the researchers involved in the Project, list of critical risks (foreseen/unforeseen), results, publications, datasets, intellectual property rights, dissemination and communication activities and impact.

Part B, input for which is provided by all partners, includes the following information: objectives, explanation of the work carried out and overview of the WP progress, impact, achievements, delays, obstacles, mitigation plans, current status, follow-up of recommendations and comments from previous reviews (if applicable), open science and deviations from Description of Action (if applicable).

2.2.2 Periodic Financial Reporting

An individual financial statement (see GA/Annex 4), which provides details on the eligible costs (personnel costs, subcontracting costs, purchase costs and other cost categories), has to be submitted from each beneficiary for each reporting period concerned. The individual financial statement must detail the eligible costs (outlined under Article 6 of the GA) for each budget category (see Annex 2). Especially for the final payment, the financial statement should detail the revenues for the action (see GA, Articles 6 and 22).

Each statement is submitted to the EC electronically via the participant portal after being signed by the financial signatory at each partner institution (FSIGN). The request for interim payment will be also submitted together with the financial statement. Also, an explanation of the use of resources, sub-contracting information (see GA, Article 6) and in-kind contributions (see GA, Articles 6 and 9) by third-parties needs to be provided from each beneficiary and third party linked to the Project. The electronic system produces automatically a periodic summary financial statement, which combines the individual financial statements for the specific reporting period and includes the request for interim payment. Moreover, the certificates on the financial statements may be required by the Granting Authority.

If a partner does not submit their financial reporting on time, no interim payment to the respective partner will be made during this period.

2.3 PROJECT DELIVERABLES

2.3.1 List of Deliverables

All the deliverables that are planned to be implemented and submitted can be found in the GA, pg. 15 and pg. 18-24 (see Section 1.3 for GA).

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2.3.2 File naming and version control

During drafting, review, editing and final submission, each deliverable must be individually identifiable using a unique document name to ensure version control. The deliverable identifier must be used in the deliverable file name. Authors and reviewers must be identified in the document revision history table. The iPhotoCult deliverables should follow a naming convention with the following format:

iPhotoCult Dx.y_<Name>_<Version>_<Date>

where:

- Dx.y: Number of deliverable
- <Name>: title of deliverable
- <Version>: version number. The numbering adheres to the following convention:
  - <1.0: Draft versions, updated each time a new person edits the deliverable
  - 1.0: Deliverable to submit to the EC
  - 1.0 < version < 2.0: Deliverable in review from the EC
  - 2.0: Officially released deliverable
- <Date>: the date format is dd<month with the first three letters>yyyy

2.3.3 Deliverables Preparation and Review Process

The editor of each deliverable should ensure that the appropriate procedure is followed. Then the deliverable should be approved by the Work Package Leader and then submitted on time to the Project Coordinator. The PC is responsible for the final review, approval and submission to the Project Officer through the Portal of the EC.

All deliverables are submitted through the project management portal of the EC by the PC. Moreover, the deliverables will be included as an appendix to the Periodic Progress Report, which covers the period in which the deliverables are due. In case a deliverable is not submitted on time, the PC will inform the PO, who will formally record the delay or absence of the deliverable.

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3 COMMUNICATION

3.1 INTERNAL COMMUNICATION

Frequent communication between the consortium members is essential and is assured mainly via email. Appropriate mailing lists have been created for an efficient communication between partners. Furthermore, a list with the telephone numbers of the main contact person of each partner has been created, in case there is need for urgent communication. Meetings (general assemblies, WP meetings etc.) are also frequently planned and/or can be arranged whenever needed.

All communications to the PMT should be addressed to Dr. Anastasia Giakoumaki (agiakoumaki@iesl.forth.gr).

3.1.1 MAILING LISTS AND EMAILS

An email account has been set up specifically for all iPhotoCult partners, which is iphotocult@iesl.forth.gr. The mailing list, created by the PMT, includes all beneficiaries and associated partners; at least a main and a deputy contact person have been included from each organization. The mailing list can be found in the cloud and is accessible to all partners. For any change in the mailing list, the main or deputy contact person of the organization that requires the change should inform the PMT.

3.1.2 MEETINGS

Meetings both in-person as well as on-line are crucial for the smooth progression of the Project and the alignment of all partners to its tasks and goals. Apart from the general assemblies and the progress meetings, meetings between partners for specific WPs will be planned according to the needs of the program.

Minutes will be taken at all meetings by the meeting's host/organising partner. The minutes will be communicated to the consortium within two weeks following the meeting date(s). Information on templates for meeting agendas and minutes can be found in the cloud repository.

Furthermore, a zoom link for web meetings has been set up by the PC, which is the following: https://us02web.zoom.us/j/82257355430?pwd=K3BqbllWUk1lTUFPU2lYMUFZNEpvZz09. There is also the option to record the meetings, in case there is the need of referring to previous conversations/agreements.

3.1.2.1 PROGRESS MEETINGS

Progress meetings for the monitoring of the progress of the Project are planned every 3 months approximately, depending whether more or less intensive periods (e.g. summer or Christmas holidays) interfere. In case it is considered necessary, more frequent progress meeting may take place upon request.

3.1.2.2 GENERAL ASSEMBLIES

Every 9 months a general assembly will take place, as it was decided during the kick-off meeting. Regarding the first general assembly, during the kick-off meeting, it was also decided by all partners to be held after nearly a year, so there will be enough time to progress in the tasks accomplished. General

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assemblies are encouraged to occur with physical attendance or in hybrid format. In certain circumstances (e.g. pandemic or other), the general assemblies may need to happen virtually.

Efforts will be made in order to combine the GeA with other relevant events described in the GA (e.g workshops, seminars etc) to minimize travel costs.

All GeA will be planned well in advance (at least 2 months before the meeting) in order to prepare for them properly.

3.2 EXTERNAL COMMUNICATION

3.2.1 FUNDING ACKNOWLEDGEMENT

Communication activities of the beneficiaries related to the action (including media relations, conferences, seminars, information material, such as brochures, leaflets, posters, presentations, etc., in electronic form, via traditional or social media, etc.), dissemination activities and any infrastructure, equipment, vehicles, supplies or major results funded by the grant must acknowledge EU support and display the European flag (emblem) and funding statement. The emblem must remain distinct and separate and cannot be modified by adding other visual marks, brands or text. Apart from the emblem, no other visual identity or logo may be used to highlight the EU support (see GA, pg. 35-36).

3.2.2 DISCLAIMER FOR PROJECT MATERIAL AND DELIVERABLES

Any communication or dissemination activity related to the action must indicate the following disclaimer (translated into local languages where appropriate): “Funded by the European Union. Views and opinions expressed are however those of the author(s) only and do not necessarily reflect those of the European Union or the European Research Executive Agency. Neither the European Union nor the granting authority can be held responsible for them (see GA, pg. 36).

3.2.3 LOGO

The logo of iPhotoCult, as depicted in Figure 2, can be found in the cloud server. The colours and font used in the logo are also displayed. These colours are also used in the documents templates generated for the Project for consistency purposes.

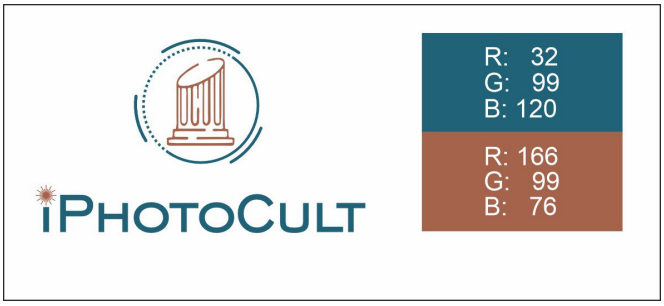

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Figure 2: The logo of iPhotoCult

3.2.4 E-MAILS

Communication with any stakeholder and/or the general public is facilitated through email. The following accounts can be used: info@iphotocult.com, info@iphotocult.eu, coordinator@iphotocult.com, coordinator@iphotocult.eu.

3.2.5 WEBSITE AND SOCIAL MEDIA

The website of the Project can be found following this link: iPhotoCult - Home. It informs about the goals and objectives of iPhotoCult, the means to achieve these goals and all the news related to the Project for any interested party (see D8.1).

Social networking will be facilitated through the social media accounts, which have been created for the Project. A LinkedIn account, posting any update on the Project, its achievements and results can be accessed via this link: (1) iPhotoCult Project: Overview | LinkedIn.

The Facebook account for iPhotoCult can be found here:
https://www.facebook.com/profile.php?id=61563584773373

Also, the X (ex. Twitter) account is the following: https://x.com/iPhotoCult

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4 CONCLUSIONS

The present deliverable D1.1 – Handbook and Documentation Standard provides information on the main procedures that define project management issues, communication and collaboration between partners, external communication, tools for web meetings and document templates for deliverables, reports and presentations. It is useful for all partners and sets the framework for an efficient collaboration among them.

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