



# GLOBIS-B

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| D1.1 Project Handbook |
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Project acronym: GLOBIS-B

Project full title: GLOBal Infrastructures for Supporting Biodiversity research

Grant agreement no.: 644003

|                             |                 |
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**TABLE OF CONTENTS**

|       |  |    |
|-------|--|----|
| 1     | Executive summary.....                           | 3  |
| 2     | Contributors.....                                | 4  |
| 3     | Main body of the handbook .....                  | 4  |
| 3.1   | Introduction .....                               | 4  |
| 3.1.1 | Purpose.....                                     | 4  |
| 3.1.2 | Reference documents and list of procedures ..... | 4  |
| 3.2   | Documentation Management.....                    | 4  |
| 3.2.1 | Introduction.....                                | 4  |
| 3.2.2 | Documentation publication rules.....             | 5  |
| 3.2.3 | Document layout .....                            | 5  |
| 3.2.4 | File naming conventions.....                     | 6  |
| 3.2.5 | Deliverables .....                               | 6  |
| 3.2.6 | Document repository .....                        | 7  |
| 3.3   | Project Communication Mechanisms .....           | 7  |
| 3.3.1 | Mailing Lists .....                              | 7  |
| 3.3.2 | GLOBIS-B meetings and teleconferences .....      | 7  |
| 3.3.3 | Project meetings.....                            | 7  |
| 3.4   | Project Management .....                         | 7  |
| 3.4.1 | Project Management structure .....               | 7  |
| 3.4.2 | List of contacts .....                           | 8  |
| 3.4.3 | IPR and access rights .....                      | 9  |
| 3.5   | Tracking of Deliverables and of Budget .....     | 9  |
| 3.5.1 | Deliverables .....                               | 9  |
| 3.5.2 | Budget .....                                     | 10 |
| 3.6   | Conflict resolution procedures .....             | 10 |
| 4     | Conclusions.....                                 | 10 |
| 5     | Annexes .....                                    | 11 |
| 6     | References .....                                 | 12 |

## **1 Executive summary**

The Project Handbook (PHB) describes the project organisation and internal procedures of the GLOBIS-B 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 the European Commission and for deliverables between partners.

The Handbook describes the following procedures in the project: documentation management, repository management, project communication mechanisms, project management, tracking system for actions. The documentation management procedure defines the standard rules and procedures with regard to the production of documentation that all partners need to apply throughout the project.

Dedicated mailing lists are in place to facilitate the communication within the consortium. We organise regular face to face consortium meetings and teleconferences.

The bodies of the Project Management structure are: the General Assembly (GA), the Executive Board (EB), Project Coordinator (PC) and Project Manager (PM).

Access Rights are regulated by Article 9 of the GLOBIS-B Consortium Agreement and Art. 25 of the H2020 Grant Agreement Annex II. The Project Manager will track the budget and deliverables. It is vital that potential problems are identified early and dealt with. To this end, conflict resolution procedures are in place, as well as procedures for dealing with changes in the consortium. The PHB is a work in progress; based on experiences and needs in the consortium, we will continue to adapt and update the document. Best practices will be incorporated and used to constantly improve the management of the project.

## 2 Contributors

The contributors to this deliverable are:

| Contributor  | Role   |
|--------------|--------|
| Jacco Konijn | Author |
|              |        |

## 3 Main body of the handbook

### 3.1 Introduction

#### 3.1.1 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.

The PHB shall be used:

1. By all partners;
2. For all deliverables to the European Commission;
3. And for deliverables between partners.

The Consortium Partners will supervise and check the work performed by the consortium in accordance with the GLOBIS-B Quality Assurance Procedure (QAP), which has been formally established in deliverable D1.1.

#### 3.1.2 Reference documents and list of procedures

Reference documents:

1. GLOBIS-B Grant Agreement (GA)
2. GLOBIS-B Description of the Action (DoA)
3. GLOBIS-B Consortium Agreement

This Handbook describes the following procedures in the project:

- Documentation management
- Repository management
- Project communication mechanisms
- Project management
- Tracking system for actions

### 3.2 Documentation Management

#### 3.2.1 Introduction

This chapter describes the documentation management procedure in the GLOBIS-B project. It defines the standard rules and procedures with regard to the production of documentation that all partners need to apply throughout the project.

The documentation management procedures is to be used:

- 1 By all partners;
- 2 for all deliverables documents to European Commission;
- 3 and for documents exchanged between partners.

### 3.2.2 Documentation publication rules

The Project Manager will ensure the adherence to the requirements of the Grant Agreement and acknowledge the financial contribution of the European Commission. All publications and any other dissemination material relating to results of GLOBIS-B should include a statement to indicate that this result was generated with the assistance of financial support from the European Union.

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

- display the EU emblem;
- 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 654003 (GLOBIS-B 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.”.

For the purpose of storage and internal exchange of files, documents etc. the GLOBIS-B website ([www.globis-b.eu](http://www.globis-b.eu)) provides an intranet environment where all project members have access to. Access is provided by the project manager of GLOBIS-B.

- Draft papers and articles shall be placed in the intranet for the whole consortium.
- The document’s owner shall invite and solicit contributions from the whole consortium when applicable.
- The contributors and authors of the publication shall abide by clause 8.4.1.1 of the Consortium Agreement allowing the Consortium to be notified of the planned publication **at least 30 days before the intended submission date**.
- Any objections on the publication of specific results (i.e. in case such result is susceptible to breach Intellectual Property Rights of another party within the consortium) shall be made to the Coordinator by the party raising the objection.
- The coordinator shall notify the consortium.
- Any objections and resolutions shall be dealt with in accordance with the GLOBIS-B consortium agreement.

### 3.2.3 Document layout

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 are available from the GLOBIS-B intranet.

The generic document template will follow guidelines given by the EU and contains the following:

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

Number of templates:

- Template for the Periodic Report
- Template for the deliverables
- Template for presentations

Document elements

Each document for reporting and for deliverables shall follow the guidelines given by the European Commission and shall have the following elements:

- Project logo
- Project number
- Project Acronym
- Project title
- Title of Report
- Period covered from ... to
- Dissemination level (i.e.: public or confidential)
- Date of preparation
- Authors
- Revision

### 3.2.4 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.

File naming conventions

| Document Type   | IDer | Convention   | File Name example                            |
|-----------------|------|--|--|
| Deliverables    | D    | D[WP#].[D#]_[Short Title]_[lead partner].[version#]_[YYYY]-[MM]-[DD].[extension] | D1.1_ProjectHandbook_UvA_v0.1_2015-03-31.doc |
| Meeting Minutes | MM   | MM-[type of meeting, e.g. EB or WP#]-[lead partner]-[YYYY]-[MM]-[DD].[extension] | MM-EB-UvA=2015-01-01.doc                     |
| Presentation    | P    | P[WP#]-[lead partner] ShortTitle].[extension]                                    | P3-UvA-ICTconference.ppt                     |
| Periodic Report | PR   | PR[period#]-[version#].[extension]   | PR1-v0.0.doc                                 |

### 3.2.5 Deliverables

All the deliverables are available in the GLOBIS-B intranet. The deliverables are written in the format below:

Executive summary

- Length: Maximum 1 A4

Target Audience: Project Officer, reviewers, consortium

- Length: Maximum 1 A4

List of contributors, their role, description of on-going work.

Main body of the report

- Target Audience: reviewers, consortium
- Length: No limit

#### Conclusions

Appendices: contain all the technical details, may be a paper.

- Target Audience: consortium (but also distributed to reviewers and PO)
- Length: No limit

By reading the executive summary and main body, reviewers 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.

### **3.2.6 Document repository**

The intranet site of the project is accessible to the members of the GLOBIS-B consortium. Others do not get access.

The public website at [www.globis-b.eu](http://www.globis-b.eu) hosts the public repository intended for the published publications and all other dissemination materials.

## **3.3 Project Communication Mechanisms**

All partners will inform the Project Manager of changes of their contact details or contact persons, or of changes in any other information needed for executing the project.

### **3.3.1 Mailing Lists**

A dedicated mailing list has been set up to support the project communication: [GLOBIS-B-project@list.uva.nl](mailto:GLOBIS-B-project@list.uva.nl) – including all staff working on the scientific, technical and exploitation work of the project and the Project Manager.

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

### **3.3.2 GLOBIS-B meetings and teleconferences**

Within the GLOBIS-B project we have the following meetings:

- Kick-off meeting
- Technical Teleconferences
- Project Meetings
- Meetings between the Project Coordinator and Project Manager
- Workshops

### **3.3.3 Project meetings**

Project meetings will be combined with the scheduled workshops as much as possible, to avoid too much travel. Where possible, project meetings can be organized by Teleconferences.

## **3.4 Project Management**

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

### **3.4.1 Project Management structure**

#### **General Assembly**

The board for ultimate decisions will be constituted by the General Assembly, consisting of one representative per partner in the consortium. It is concerned with the overall strategic direction of the project. Specific decision making issues are described in the Consortium Agreement

### Executive Board (EB)

The EB is responsible for the day to day management of the project and the ongoing activities. The EB prepares decisions to be taken by the GA and executes these decisions. The EB consists of one representative per partner, appointed by the GA.

### Project Coordinator (PC) and Project Manager (PM)

The EB delegates relevant parts of the executive management of GLOBIS-B to the Project Coordinator, Dr. Daniel Kissling. The coordinating partner, UvA, will appoint Jacco Konijn from UvA as the Project Manager to professionally handle all consortium management issues and Wouter Los from UvA as special advisor to assist the PC in fulfilling the tasks as described in the Description of the Action (DoA). Together, the PC and PM are responsible for the day-to-day operations of the project. Only the PC and PM shall have direct communication with the Project Officer at the European Commission.

#### 3.4.2. List of contacts

An overview of the current contact persons in the GLOBIS-B project can be found below. In the in the file GLOBIS-B\_contacts.xls in the intranet, changes will be updated when necessary.

| Partner | Name                       | email  |
|---------|----------------------------|--|
| UvA     | Daniel Kissling            | wdkissling@gmail.com   |
|         | Wouter Los                 | W.Los@uva.nl   |
|         | Jacco Konijn               | J.L.Konijn@uva.nl  |
|         | Silvia Wissel              | s.wissel@uva.nl  |
|         | Jan-Willem Bleeker         | J.W.C.Bleeker@uva.nl   |
| CU      | Hannah Cowell              | cowellh1@cardiff.ac.uk   |
|         | Sian Jonas                 | european-research@cardiff.ac.uk  |
|         | Nick Bodycombe             | bodycomben@cardiff.ac.uk   |
|         | Alex Hardisty              | hardistyar@cardiff.ac.uk   |
| UAH     | Enrique Alonso             | enrique.alonso@consejo-estado.es   |
|         | Sandra Fernandez Gutiérrez | <a href="mailto:sandra.fernandez@uah.es">sandra.fernandez@uah.es</a>                             |
|         | Marisa Perez Peñamaría     | marisa.perezpenamaria@fgua.es  |
| CNR     | Maria Santamaria           | m.santamaria@ibbe.cnr.it   |
|         | Graziano Pesole            | g.pesole@ibbe.cnr.it   |
|         | Francesca de Leo           | f.deleo@ibbe.cnr.it  |
|         | Marisa Mirizzi             | m.mirizzi@ibbe.cnr.it  |
| gnumila | David Manset               | dmanset@maatg.fr<br>dmanset@gnumila.fr   |
|         | Joerg Freyhof              | joerg.freyhof@idiv.de  |
| iDiv    | Claudia Huebner            | Claudia.Huebner@verwaltung.uni-halle.de  |
|         | Sigrid Koehne              | <a href="mailto:sigrid.koehne@verwaltung.uni-halle.de">sigrid.koehne@verwaltung.uni-halle.de</a> |



| Organisation     | Name                | Email  |
|------------------|---------------------|--|
| <b>ALA</b>       | Lee Belbin          | <a href="mailto:leebelbin@gmail.com">leebelbin@gmail.com</a>                             |
|                  | Peter Doherty       | <a href="mailto:Peter.Doherty@csiro.au">Peter.Doherty@csiro.au</a>                       |
|                  | John La Salle       | <a href="mailto:John.LaSalle@csiro.au">John.LaSalle@csiro.au</a>                         |
|                  | Stephanie Vongavel  | <a href="mailto:Stephanie.Vongavel@csiro.au">Stephanie.Vongavel@csiro.au</a>             |
| <b>CAS</b>       | Ma Keping           | <a href="mailto:kpma@ibcas.ac.cn">kpma@ibcas.ac.cn</a>                                   |
| <b>WDCM</b>      | Juncai Ma           | <a href="mailto:ma@sun.im.ac.cn">ma@sun.im.ac.cn</a>                                     |
| <b>KIB</b>       | Xiangyun Yang       | <a href="mailto:xyx@mail.kib.ac.cn">xyx@mail.kib.ac.cn</a>                               |
| <b>CRIA</b>      | Vanderlei Canhos    | <a href="mailto:vcanhos@cria.org.br">vcanhos@cria.org.br</a>                             |
| <b>DataOne</b>   | Bill Michener       | <a href="mailto:william.michener@gmail.com">william.michener@gmail.com</a>               |
|                  | Rebecca Koskela     | <a href="mailto:rkoskela@unm.edu">rkoskela@unm.edu</a>                                   |
| <b>GEO Bon</b>   | Henrique Pereira    | <a href="mailto:henrique.pereira@idiv.de">henrique.pereira@idiv.de</a>                   |
| <b>GBIF</b>      | Donald Hobern       | <a href="mailto:dhobern@gbif.org">dhobern@gbif.org</a>                                   |
|                  | Olaf Banki          | <a href="mailto:obanki@gbif.org">obanki@gbif.org</a>                                     |
| <b>LIFEWATCH</b> | Peter van Tienderen | <a href="mailto:P.H.vanTienderen@uva.nl">P.H.vanTienderen@uva.nl</a>                     |
|                  | Benjamin Sanchez    | <a href="mailto:benjamin.sanchez@mineco.es">benjamin.sanchez@mineco.es</a>               |
|                  | Alberto Basset      | <a href="mailto:alberto.basset@unisalento.it">alberto.basset@unisalento.it</a>           |
| <b>NEON</b>      | Brian Wee           | <a href="mailto:bwee@neoninc.org">bwee@neoninc.org</a>                                   |
|                  | Russ Lea            | <a href="mailto:rlea@neoninc.org">rlea@neoninc.org</a>                                   |
|                  | Hank Loescher       | <a href="mailto:hloescher@neoninc.org">hloescher@neoninc.org</a>                         |
| <b>ELIXIR</b>    | Niklas Blomberg     | <a href="mailto:niklas.blomberg@elixir-europe.org">niklas.blomberg@elixir-europe.org</a> |
|                  | Andrew Smith        | <a href="mailto:andrew.smith@elixir-europe.org">andrew.smith@elixir-europe.org</a>       |
| <b>SANBI</b>     | Kristal Maze        | <a href="mailto:k.maze@sanbi.org.za">k.maze@sanbi.org.za</a>                             |

**Project Officer**

Anna Marie Johansson

**Financial/Legal/Admin Officer**

Samira Benyahia

**Reviewers**

(not known currently)

**3.4.3 IPR and access rights**

Access Rights are regulated by Article 9 of the GLOBIS-B Consortium Agreement and Article 25 of the Horizon 2020 Grant Agreement Annex II.

For best practice every use by any partner of software or components related to the background knowledge of a partner for the implementation of the technical work in GLOBIS-B should be recorded in writing or at least by email exchange between parties.

**3.5 Tracking of Deliverables and of Budget****3.5.1 Deliverables**

The Project Coordinator and Project Manager will monitor technical work per WP and actions from meetings.

The Project Coordinator and Project Manager will monitor the list of staff members working within the consortium. Every partner will communicate the list of staff working for the GLOBIS-B Project throughout the lifetime of the Project to the Project Manager. The workforce may change but the current Person Months PM will be strictly adhered to by each of the partners in the WPs they are dealing with.

### **3.5.2 Budget**

The Project Management (WP1) will have direct communication with the financial and administrative officer at each of the beneficiaries to collect the following information:

- Full Budget estimate after RP1
- WP budget estimate after RP1
- Full expenditure and costs declaration after RP1 and RP2
- WP expenditure and costs declaration after RP1 and RP2

### **3.6 Conflict resolution procedures**

It is vital that potential problems are identified early and dealt with. Potential problems can be of the following nature:

#### **Technical/Scientific Problems**

Sometimes, as a result of work undertaken in the project, it becomes obvious that for technical reasons the original goal is unachievable to the point it is a waste of effort to continue. A procedure must be followed for the swift continuation of the Project:

- First any technical issues within a work package must be brought to the attention of the Work Package leader;
- If the problem can be solved within the work package such as for example: the technical issues can be fixed by another partner without change of budget, the WP leader will take the final decision and report to the coordinator;
- If necessary the issue shall be escalated to the Project to be reported to the GA who shall take the final decision;
- Any member of the GA can object to the proposed solution;
- Ultimately any changes in the DoA shall be dealt with and approved by the GA.

#### **Partners**

A partner wishing to leave the consortium must inform the Project Coordinator at least 4 months before he wishes to do so. Defaulting partners will be dealt with in accordance with the consortium agreement.

## **4 Conclusions**

This document has set out the practical organisation and procedures of the GLOBIS-B project. It is a reference document for the consortium members that they should read and familiarise themselves with. 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 constantly improve the management of the project. The most recent version will be available on the google drive, in the WP1 Project Management folder.

## **5 Annexes**

None.

## **6 References**

- Horizon 2020 Grant Agreement, including the Description of the Action (DoA/ Annex I)
- GLOBIS-B Consortium Agreement