

THIS DOCUMENT IS EXTRACTED FROM THE FULL DELIVERABLE, AS THE ORIGINAL DELIVERABLE CONTAINS CONFIDENTIAL INFORMATION FOR THE COURSE OF THE PROJECT. THE FULL DELIVERABLE CONTENT WILL BE PUBLISHED AFTER THE END OF THE PROJECT.



An Integrated Solution for Sustainable Care for Multimorbid Elderly Patients with Dementia



WP1: Project Management

D1.1: Project Handbook

Contractual Date of Delivery to the EC: 31 August 2021 (M2)

Actual Date of Delivery to the EC: 31 August 2021

Participant(s): **EXYS**

Author(s): ¹Angelo Consoli, ¹Jaouhar Ayadi, ¹Luca Gilardi

Type (P-prototype, R-report, O-other, ORDP-Open Research Data Pilot, DEM-Demonstrator, ET-Ethics): R

Dissemination level: PU

Version: 1v7-Public

Total number of pages: 65



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 945169.

THIS DOCUMENT IS EXTRACTED FROM THE FULL DELIVERABLE, AS THE ORIGINAL DELIVERABLE CONTAINS CONFIDENTIAL INFORMATION FOR THE COURSE OF THE PROJECT. THE FULL DELIVERABLE CONTENT WILL BE PUBLISHED AFTER THE END OF THE PROJECT.

Executive Summary

The EU H2020 project CAREPATH aims to develop a flexible and modular platform that will provide improved interventions for the management of multimorbid elderly patients with dementia.

The purpose of this document is to provide a single point of reference on the project consortium and contact coordinates, on the project procedures, quality management and risk management. It describes the project management structure and decision-making procedures, the baselines and management rules for project effort / cost / schedule, how changes are to be made, the tools and rules supporting the consortium communication and collaboration, the procedure to prepare deliverables, instructions for procurements, the processes for internal and external reporting, and the project risk management plan. Quick links to other useful documents are included.

This is an online live document, maintained throughout the project lifecycle.

Important note:

The nature of this document is: CO (limited to the consortium partners only).

In order to meet privacy constraints, and in order to fulfil the commitment stated in the DoA for a public document (nature: PU), a shorter version with limited information is extracted from this document and will be publicly available.

THIS DOCUMENT IS EXTRACTED FROM THE FULL DELIVERABLE, AS THE ORIGINAL DELIVERABLE CONTAINS CONFIDENTIAL INFORMATION FOR THE COURSE OF THE PROJECT. THE FULL DELIVERABLE CONTENT WILL BE PUBLISHED AFTER THE END OF THE PROJECT.

Table of contents

1	INTRODUCTION	9
1.1	Project information	9
1.2	Document scope	12
1.3	Document structure	12
2	PROJECT CONTEXT	14
3	PROJECT MANAGEMENT APPROACH	17
3.1	Overall Management strategy	17
3.1.1	<i>CAREPATH Project Coordinator (PC)</i>	18
3.2	Project management structure	18
3.3	Decision making and conflict resolution	20
3.4	Innovation management	20
3.5	Validation and Ethics	21
4	PROJECT BASELINE	22
4.1	Introduction	22
4.2	Schedule Baseline	22
4.3	Effort Calendar	22
4.4	Cost Baseline	22
4.5	Quality baseline	22
4.5.1	<i>Quality assurance measure</i>	22
4.5.2	<i>Quality system</i>	23
4.6	Contractual Baseline	23
5	CHANGE MANAGEMENT PLAN	24
5.1	Change Management Approach	24
5.2	Definition of Change	24
5.3	Change Process	25
5.4	Roles and Responsibilities	25
5.5	Change Control Process	26
5.6	Change Request Evaluation Criteria	27
6	COMMUNICATION AND COLLABORATION MANAGEMENT PLAN	28
6.1	Introduction	28
6.2	Communication Management Approach	28
6.3	Project Team Directory	28
6.3.1	<i>Adding/ Modifying/Deleting Users</i>	28
6.4	Communication Channels	29
6.5	Communication Guidelines	31
6.5.1	<i>Communication Tools Guidelines</i>	31
6.5.1.1	Document Management System – Project Cloud	31
6.5.1.2	Communication platform	32
6.5.1.3	Planning Tool for Action Items	33
6.5.2	<i>Meeting Guidelines</i>	33
6.5.2.1	List of Project Meetings	33
6.5.2.2	Meeting Requests	35
6.5.2.3	Participants to Meetings	35
6.5.2.4	Meeting Agenda	36
6.5.2.5	Meeting Minutes	36
6.5.2.6	Meeting Chairperson	37
6.5.2.7	Resources for Meetings	37
6.5.3	<i>Email Guidelines</i>	37
6.5.3.1	General Guidelines	38
6.5.3.2	Mailing Lists	38
6.5.4	<i>Document Handling Guidelines</i>	39

THIS DOCUMENT IS EXTRACTED FROM THE FULL DELIVERABLE, AS THE ORIGINAL DELIVERABLE CONTAINS CONFIDENTIAL INFORMATION FOR THE COURSE OF THE PROJECT. THE FULL DELIVERABLE CONTENT WILL BE PUBLISHED AFTER THE END OF THE PROJECT.

6.5.4.1	Document Formats	39
6.5.4.2	Document Language	40
6.5.4.3	Filename Conventions	40
6.5.4.4	Document Editing and Sharing	41
6.5.4.5	Document Templates.....	41
6.5.5	<i>Gitlab – Source version control Guidelines</i>	41
6.5.6	<i>Date and Time Guidelines</i>	42
6.5.7	<i>Dissemination Guidelines</i>	42
6.5.7.1	General Guidelines	42
6.5.7.2	Scientific Publications	42
6.5.7.3	Dissemination Log	43
6.5.7.4	Dissemination Costs.....	43
7	DELIVERABLE MANAGEMENT	45
7.1	Deliverable Types and Confidentiality Levels.....	45
7.2	Deliverable Preparation and Peer Review Process	45
7.3	Deliverables and their Reviewers	46
8	EFFORT AND COST MANAGEMENT PLAN	50
8.1	Introduction	50
8.2	Effort and Cost Management Approach	50
8.3	Managing the Consumption of Effort and Costs.....	50
8.3.1	<i>Planning and Monitoring</i>	50
8.3.2	<i>Guidelines for Unplanned Expenses</i>	50
8.4	Response Process for Effort and Cost Deviations	51
8.5	Cost Change Control Process	51
9	PROCUREMENT MANAGEMENT	52
10	PROJECT SCOPE MANAGEMENT PLAN	53
10.1	Introduction	53
10.2	Scope Verification.....	53
10.3	Scope Control	53
11	SCHEDULE MANAGEMENT PLAN	54
11.1	Introduction	54
11.2	Schedule Management Approach	54
11.3	Schedule Control	54
11.4	Schedule Changes and Thresholds	54
12	REPORTING MANAGEMENT	56
12.1	Internal Reporting	56
12.2	External Reporting.....	56
13	RISK MANAGEMENT PLAN	59
13.1	Introduction	59
13.2	Risk Methodology	59
13.3	Risk Identification.....	60
13.4	Risk Assessment and Analysis.....	60
13.5	Risk Mitigation Plan	61
13.6	Risk Mitigation Plan Implementation	62
13.7	Risk Tracking	62
14	CONTACT LIST	63
15	REVIEW STATUS	64
16	DOCUMENT HISTORY	65