



Qualification of innovative floating substructures for 10MW wind turbines and water depths greater than 50m

Project acronym LIFES50+
Grant agreement 640741
Collaborative project
Start date 2015-06-01
Duration 40 months

Deliverable D8.3 MS PowerPoint and MS Word Templates

Lead Beneficiary MARINTEK
Due date 2015-08-31
Delivery date 2015-08-31
Dissemination level Public
Status Completed
Classification Unrestricted

Keywords Project Templates
Company document number [Click here to enter text.](#)



The research leading to these results has received funding from the European Union Horizon2020 programme under the agreement H2020-LCE-2014-1-640741.

Disclaimer

The content of the publication herein is the sole responsibility of the publishers and it does not necessarily represent the views expressed by the European Commission or its services.

While the information contained in the documents is believed to be accurate, the authors(s) or any other participant in the LIFES50+ consortium make no warranty of any kind with regard to this material including, but not limited to the implied warranties of merchantability and fitness for a particular purpose.

Neither the LIFES50+ Consortium nor any of its members, their officers, employees or agents shall be responsible or liable in negligence or otherwise howsoever in respect of any inaccuracy or omission herein.

Without derogating from the generality of the foregoing neither the LIFES50+ Consortium nor any of its members, their officers, employees or agents shall be liable for any direct or indirect or consequential loss or damage caused by or arising from any information advice or inaccuracy or omission herein.

Document information

Version	Date	Description
0.1	2015-08-12	Draft for initial approval by PM Prepared by Dag Atle Nesheim Reviewed by Matthias P. Nowak Approved by Enter names
0.2	2015-08-20	Advanced draft, only missing description of one template Prepared by Dag Atle Nesheim Reviewed by Matthias Nowak Approved by Jan Norbeck
1.0	2015-08-24	Final version for submission to EC Prepared by Matthias Nowak Reviewed by Jan Norbeck Approved by Petter Andreas Berthelsen

Authors	Organization
Dag Atle Nesheim	MARINTEK
Matthias P. Nowak	MARINTEK

Contributors	Organization
Jan Arthur Norbeck	MARINTEK

Definitions & Abbreviations

PM	Project Manager
FTE	Full time equivalent





Executive Summary

This document accompanies the official MS Powerpoint and MS Word templates to be used in LIFES50+.

Contents

1	Introduction	4
2	LIFES50+ Templates	4
2.1	Template for LIFES50+ Deliverables	6
2.2	Template for Minutes of Meetings	7
2.3	Template for MS PowerPoint presentations.....	8
2.4	Form for declaration of Innovation Potential inventory (IP-i)	8
2.5	Form for declaration of Potentially Protectable IP (PPI-d)	8
2.6	Templates for Monthly Status Reports.....	8
2.6.1	Excel template for reporting spent and planned work by all beneficiaries.....	8
2.6.2	Word template for monthly progress reports by all work package leaders	9
2.7	Template for input to Periodic Progress Reports.....	9
2.8	Letterhead.....	10
2.9	Template for Press Release	10
2.10	Other templates.....	10
3	Concluding Remarks	10



1 Introduction

A common set of templates secures a consistent visual presentation of the project, compliance with formal requirements related to metadata as well as making sure time is spent on creating high quality content rather than structure and visual profile.

In LIFES50+ the following templates were deemed necessary:

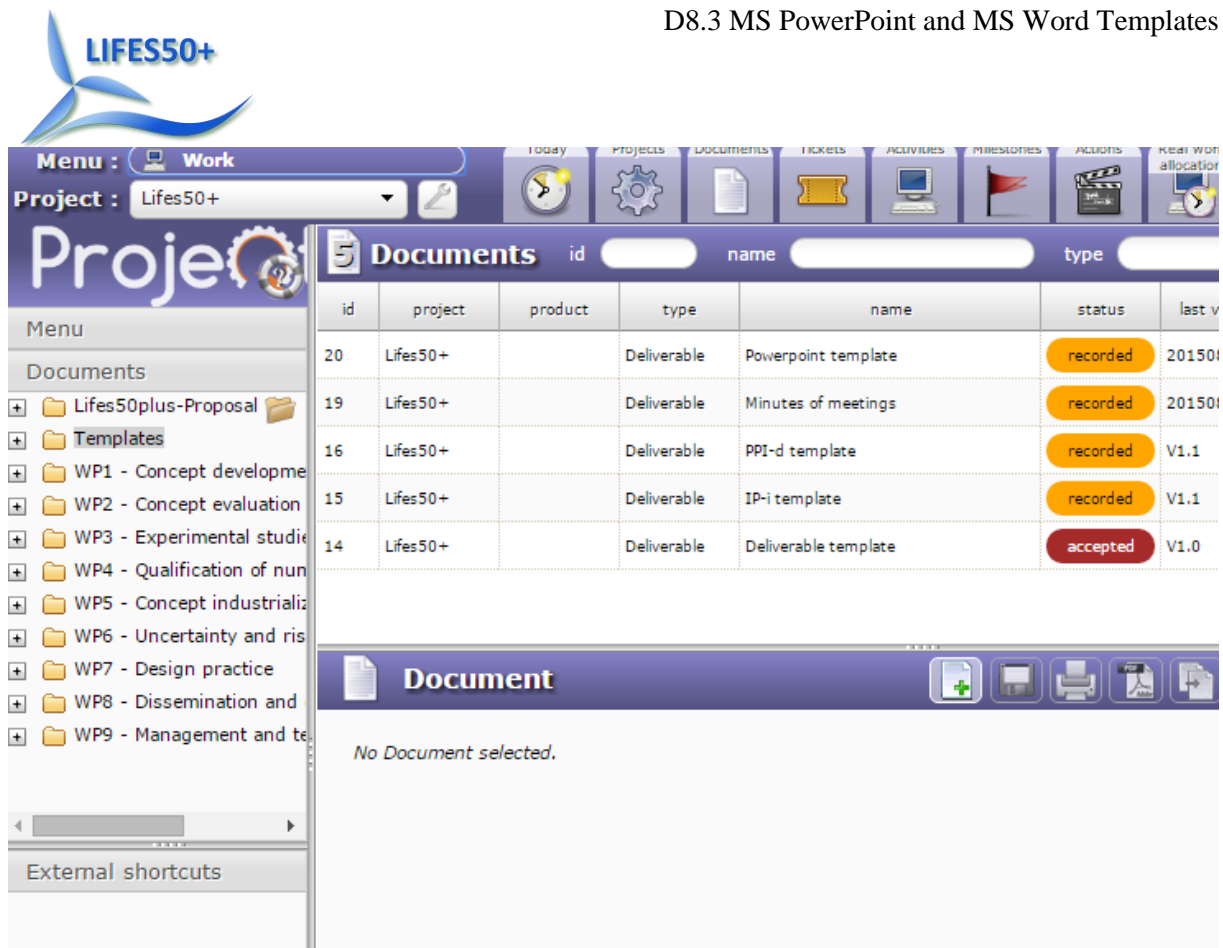
- Template for deliverables
- Template for Minutes of Meetings
- Template for MS PowerPoint presentations
- Declaration of Innovation Potential (for each Task)
- Declaration of Potentially Protectable Intellectual Properties
- Templates for monthly status reports to the Project Manager
- Template for input to periodic progress reports to the EC
- Letterhead
- Press release

The official project logo, used in all templates and to be used in all external material produced in LIFES50+ is presented in deliverable D8.2 Project logo. Guidelines for LIFES50+ dissemination material (including the LIFES50+ logo and reference to the EC and Horizon 2020) are presented in deliverable D8.1 Dissemination guidelines and procedures.

2 LIFES50+ Templates

There are nine templates developed for use in LIFES50+. They share a common set of requirements related to ease of use, compliance with requirements defined in the LIFES50+ Grant Agreement, and a consistent visual project profile. In addition all templates have Proofing language set to English UK.

All templates are briefly described in this deliverable while the actual templates are to be found in the document management part of the internal web site under <http://lifes50plus.eu/project/>. The left side menu contains the section Documents. On top of the set of folder is the folder "Templates" to be found. Selecting it displays the list of templates in the main area. Selecting a template displays the document details, where under the section "versions", the actual template can be downloaded. Figure 1 Document explorer and documents shows the document explorer on the left side in the accordion under menu, while the upper main area presents the available documents. The figure shows the 5 templates that are uploaded at this moment.



The screenshot displays the LIFES50+ project management interface. At the top, there is a navigation bar with icons for 'Today', 'Projects', 'Documents', 'Tickets', 'Activities', 'Milestones', 'Actions', and 'Real work allocation'. Below this, the 'Project' is identified as 'Lifes50+'. The main area is divided into two sections: a 'Documents' table and a 'Document' details view.

The 'Documents' table lists the following documents:

id	project	product	type	name	status	last v
20	Lifes50+		Deliverable	Powerpoint template	recorded	201501
19	Lifes50+		Deliverable	Minutes of meetings	recorded	201501
16	Lifes50+		Deliverable	PPI-d template	recorded	V1.1
15	Lifes50+		Deliverable	IP-i template	recorded	V1.1
14	Lifes50+		Deliverable	Deliverable template	accepted	V1.0


The 'Document' details view below the table shows 'No Document selected.' and includes icons for adding, deleting, editing, and downloading documents.

Figure 1 Document explorer and documents

Selecting one document in the upper plane shows the details of the document in the lower plane as to be seen in Figure 2 Document details. For each document there are several fields for detailed information about the document in general. Under the versions section, one can download, edit or delete existing versions or add new ones. In addition templates can be downloaded.



evaluation	15	Lifes50+	Deliverable	IP-i template	recorded	V1.1
mental studie	14	Lifes50+	Deliverable	Deliverable template	accepted	V1.0

Document 07-15 2015 

name : Deliverable template

type : Deliverable

project : Lifes50+

product :

directory : /Templates

document reference : -DL-14-Deliverable template

external reference :

author : Matthias P. Nowak

closed : cancelled

Versions

versioning type : evolutive

last version : V1.0

status ● accepted




	version	date	status	file
  	V1.0	2015-07-15	accepted	Lifes50Deliverable.dotx

Figure 2 Document details

2.1 Template for LIFES50+ Deliverables

The template for deliverables complies with requirements from the project's Grant Agreement in terms of reference to Grant Agreement No, project details (such as project start date and duration) as well as the official disclaimer stating that the content of the publication is the sole responsibility of the publishers and it does not necessarily represent the views expressed by the European Commission or its services. The official EU emblem is also embedded in the template as well as the official LIFES50+ logo.

The deliverable template also supports document information such as version control, author(s) and contributor(s). The template contains content controls which displays information to the author what to enter in those fields. These content controls are linked to the related document properties. Hence, meta-information is available in e.g. windows explorer. The first few pages have been locked so that the user is only allowed to fill in information in certain destinations.

By request of the first General Assembly a field for company-internal reference number was added to the template. This field is linked to the custom XML property that is used by systems like Sharepoint.



The font selected for the template is Times New Roman 11 and the text is aligned to both the left and right margins. This creates a clean look along the left and right side of the page. Paragraphs are separated by 10pt (space below each paragraph).

The template header contains reference to the deliverable number and name as well as containing the official project logo. The footer contains reference to the project name (and type of communication, deliverable) and Grant Agreement as well as containing the official EU emblem. The footer also contains the page number and the total number of pages.

At the end of the template a section to be used for quality control is added. This section contains the time table related to internal quality control (such as deadline for assigning peer-reviewers, deadline for submitting the deliverable to the PM for approval, etc.) based on the official deadline for submission of the deliverable to the EC. In addition a checklist (procedure) related to finalisation of the deliverable (by the lead beneficiary) before submission is added. This checklist lists steps such as:

- Appearance should be generally appealing and according to the LIFES50+ template.
- The executive summary should give a short and to the point description of deliverable.
- All abbreviations should be explained in footnotes or in a separate list.
- All references should be identified and listed.
- The deliverable must clearly identify all contributions from partners. It must justify the resources used.
- The deliverable must clearly identify the contributions to the state of art. It must justify the scientific contributions.
- Each QA check should be signed off in the Document information on page 2.
A full spell check should be completed.

The section for quality control will be filled in by the lead beneficiary and read by the Administrative Support Team. The section is then removed from the official document submitted to the EC but kept in the original word-version.

2.2 Template for Minutes of Meetings

The template for minutes of meetings comply with requirements related to documentation of invitees, attendees, venue, date(s), time, agenda, minutes, decisions made and action points (hereunder responsible party and deadline).

The minutes of meetings are relevant for documentation of travel expenses, decisions made, action points as well as serving as potential documentation related to registration of Intellectual Property Rights.



2.3 Template for MS PowerPoint presentations

Project participants are left in charge of most of the visual aspects of their PowerPoint presentations outside the use of the official EU-emblem (mandatory as defined in the Grant Agreement) and the project's official logo. In addition, the format for bullet points, headings and font is predefined in the template. For presentations to be made in official project meetings (such as General Assembly, WP kick offs, etc.) the organisers may impose specific requirements related to content, number of slides/duration, etc. as they see fit. Presenters are urged to comply with such requirements from the organiser.

2.4 Form for declaration of Innovation Potential inventory (IP-i)

The Innovation Potential inventory form is a project internal notice to the IP management group about potential innovations and covers the innovations potential for each work package task. The first table has to be filled with the identifying details where in the project the potential IP might be created. The purpose section gives guidance to when and why this form has to be filled out and submitted. The main space is reserved for a description of the topics which might be covered by a potential innovation. At the end, a checklist is added to ensure that the IP-i contains all relevant information. The mail-address of the recipient is written above the checklist.

2.5 Form for declaration of Potentially Protectable IP (PPI-d)

This form is a formal declaration of potentially protectable IP; as such it needed to satisfy stronger requirements in order to support an eventual dispute related to IPR. As opposed to the IP-i this form concerns one specific IP and the required level of detail is much higher. Moreover, comments are added that support the creation of a statement based on this template.

The last section before the checklist contains a confirmation of reception by the IP management group.

2.6 Templates for Monthly Status Reports

The template for monthly status reports from the WP leaders contains a section where the WP number and name of the responsible person is stated. More detailed of the monthly status reports are presented in deliverable D9.1 Monthly internal project progress reports. As a monthly reporting requirement is rather high frequency we aim at keeping the content fixed on deviations. A small section reserved for progress made during the reporting period is added for monitoring purposes.

2.6.1 Excel template for reporting spent and planned work by all beneficiaries

In order to ensure that the project is on track and to give the Project Manager a tool to keep an overview over personnel resources we require all beneficiaries to report planned and spent hours on all work packages they are contributing to. The focus is on how much work has been done, how much is planned and what amount is left.



This reporting requirement could be an additional burden on all project participants. However, experience with past projects has shown that keeping track of the time budget is a must in order to avoid surprises. Moreover, when the periodic reports are due, the time consumption has to be documented anyway. The first work sheet contains a big table. Three columns are dedicated to each beneficiary. The first column contains the allocated time budget in hours on the work package line. The second column contains planned hours, while the third one is for hours spent. Above the work package line we have listed all subtasks, tasks, and deliverables. The project partners are free to allocate hours at the level they prefer. It is the sum of hours that is of interest to the project manager. Participants in a work package got an allocated amount in person month on the work package level. However, not everybody is contributing to all tasks and deliverables with the same amount. The EU guidelines and examples use a value of 1720 work hours per year as a full time equivalent (FTE). This equals 215 work days of 8 hours each. For a month this equals to slightly more than 143 hours, which is the value we have used to translate the person month values from the grant agreement to hourly values in the first column for each beneficiary. Each beneficiary sends the completed Excel work book to the Project Manager during the month after the actual period that means the numbers for August are reported in September. The administrative support team will combine the reported numbers and upload or send out the updated master document.

2.6.2 Word template for monthly progress reports by all work package leaders

The Excel template focused on how much work had been done and how much is planned, this template focuses on what has been done. The first page contains a header with identifying information about the project and work package. It also contains a field specifying which project month is reported. Next, there are several sections explaining the purpose and details. The progress table shall contain the list over work items that are completed during the actual month, items that are in work and items that are due to commence in the following month. Each item shall contain a reference to the related work item in the Description of Action, and indications when the item is due or whether it is delayed or not. This table is ought to give a short concise overview. The next section has to be filled with explanations of completed work, eventual deviations from the plan, and eventual decisions that are made to ensure project progress.

2.7 Template for input to Periodic Progress Reports

The LIFES50+ Grant Agreement (Article 20) specifies the reporting requirements imposed on the Project Coordinator and each beneficiary as well as third parties. This includes a periodic progress report. The Project Coordinator is responsible for the official submission of these reports but each beneficiary is required to contribute accordingly. A template has been created to ensure that the Project Coordinator receives the required input from each beneficiary in order to consolidate this input into an overall periodic progress report for LIFES50+. Elements include:

- Explanation of the work carried out by the beneficiary
- Overview of the progress towards the project objectives, including milestones and deliverables as defined in the LIFES50+ Description of Action as well as any exploitation and dissemination

Please note that the formal requirements for the overall LIFES50+ periodic progress report contain more elements than the ones listed above. These elements are however not part of the reporting requirements imposed on each beneficiary.





Please also note that the financial statements are part of the periodic progress report but these are covered by the EU participant portal and no additional template is required. More detailed are presented in the deliverable D9.8 Periodic Report to EC.

2.8 Letterhead

The template for letters is designed for paper of the format A4 and usage in envelopes of format E65. There is a format of the same size, the DL format. The difference between those two formats is the position of the window on the envelope. The E65 window is 2.5 cm higher up. This is important because the placeholder on the A4-letter has to be at the right place. Header and footer contain the logo, the document property "Subject", the EU-emblem, the number of the grant agreement, and the current and total page number. The margins of this letter template are the Word Narrow standard. To the right, we have the name, address, email and phone number details of the sender, while the left side comprises the destination address. Underneath the address there is a field for the subject. Below the subject field the salutation field is arranged in a bigger font. All the mentioned parts are locked, only content holder allow editing. The main text area is editable. The next items are locked, which are the closing, the title of the sender and the date. In order to support folding for the E65-letter format (approximately in thirds), folding marks are printed in the margins.

2.9 Template for Press Release

All press releases are prepared by the Administrative support team. A first press release was created before the work with templates was completed. The decision was made to modify the existing press release in case of further releases instead of using time for the creation of a template.

2.10 Other templates

For internal use and as a starting point, the AST has created a Lifes50Cover.dotx and a Lifes50Notes.dotx. Moreover, the AST got a request to avoid "+" as part of a filename, since one Windows version seems to treat that character differently.

3 Concluding Remarks

The templates created to be used in LIFES50+ comply with the identified requirements related to securing a consistent visual presentation of the project, compliance with formal requirements related to metadata as well as making sure time is spent on creating high quality content rather than structure and visual profile. In addition ease of use has been one of the key mantras when creating the templates.

