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BeXyl Operational Manual

Deliverable 10.2

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ABSTRACT

This deliverable presents the core management handbook for the BeXyl project. In general, the project management revolves around technical, administrative and financial issues. The project management is substantially supported by the Management Board for the technical aspects and by the Coordination Team for the administrative and financial aspects. The use of the collaborative platform in the reserved area of the website BeXyl (www.bexylproject.org) for creating and sharing documents will provide central project information and relevant templates and guidelines for the consortium members. The reserved area is built through a secured collaborative workspace created in the SACO portal from CSIC (saco.csic.es) where all project partners can easily share and exchange information, download and update reports, documents and files. Thus, the content of this website section will be regularly updated when required.

This deliverable serves as the core management handbook and describes the structure that will provide guidelines for the project members to follow during the full cycle of the project. The handbook will set out the governance structure (e.g., boards and committees, responsibilities of partners, lead roles, etc.) as well as the mechanisms and tools (e.g., internal collaborative platform, webpage, reporting periods, etc.) used for the management and administrative coordination of the project and summarizes reporting strategies and requirements as well as outlining organizational structures related to different project levels. In doing so, it will define the communication processes within the consortium as well as to the EC and outline the consortium's formal communication of the project's activities and outcomes.

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1. INTRODUCTION

1.1. Purpose and scope of the Operational Manual

The purpose of the project management is to foresee or predict as many dangers and problems as possible; and to plan, organise and control project activities, so that the project is completed as successfully as possible despite all the risks. To fulfil such purpose a management structure has to be setup. The management structure is designed to reach the following objectives:

- Meeting the objectives of the project within the agreed budget and timeframe.
- Ensuring project compliance with EC rules.
- Coordinating project activities and ensuring effective communication.
- Carrying out quality control of the work performed and of deliverables.
- Identifying risks or conflict situations and resolving them.
- Setting up an organization to support the above objectives.
- Maintaining the required reporting activities towards the European Commission.

Procedures are defined to facilitate operations and management of the project. Their objectives are not to create unnecessary management tasks with a heavy structure, but to give simple tools, allowing all activities to be managed properly.

1.2. Structure of the document

The BeXyl Operational Manual provides guidelines concerning:

- **Project Bodies**- There are several bodies governing the different aspects of the project. This structure includes the Management Board (MB), General Assembly (GA) and an External Expert Advisory Board (EEAB). Additionally, a Practitioner Panel (PP) and Exploitation Committee (EC) will be appointed during the project. Project Bodies are summarized in Figure 1.

- **Communication** - Three different kinds of communication are distinguished: internal, external and towards the EC.

- **Document management** - During the lifetime of BeXyl, many documents will be produced, and some simple rules should be followed in order to facilitate the management of their production. Responsibilities of documents are specified in this plan, as well as other general rules of formats and instructions on the level of confidentiality of the documents.

- **Periodic Reporting and progress monitoring** - The EC will monitor the progress of the project through periodic reports, deliverables and project reviews. To ensure periodic

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monitoring MB meetings (section 2.2) will be convened complementing the General Assembly to insure update among WP leaders at least every 6 months.

- **The Rules of Horizon Europe** Participation, summarised in the Model Grant Agreement, including operational, financial and organisational issues and responsibilities are laid down as advanced in the Description of Activities of the project (Implementation section), and further detailed in the Model Grant Agreement prepared by the EC. Financial statements have to be produced 6 months before the official Periodic Report for continuous monitoring, and a new financial statement will be submitted to the EC with the official Periodic Reports (M18, M36 and M48). This will facilitate the detection of any deviation from planned activities or some potential mistakes made in the reporting that can be solved before submission of the official reporting.

This document has been prepared following principles of the ISO 9000 standard. In its most basic form this standard requires to:

- *Say what you do*: have documented procedures for the work affecting product or service quality.
- *Do what you say*: carry out the work in accordance with the written procedures.
- *Have the records to prove it*: show documented proof of compliance to auditors, providing objective evidence.

By describing what is actually done, writing it down and then seeing how it can be improved, many of the requirements of ISO 9000 can be met. In addition, there are few additional activities that this standard requires:

- A defined organisational structure with clear responsibilities;
- Internal Quality Assurance (QA);
- Management Review through regular meetings.

The Project Coordinator (PC), Dr. Blanca B. Landa (P1-CSIC), is responsible for the adherence to the QA procedures set out for the project.

Concerning Deliverables control, a review process will be established to guarantee their quality and accomplishment in due time. Upon receipt of the deliverable, the PC will focus on the quality and coherence of the content with reference to the project GA and DoA and the templates provided, and it will be returned to the partner responsible for the deliverable to implement the requested changes if needed.

The main procedures are fully explained in section 5.1 Project Deliverables that contains a review process section.

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2. PROJECT ORGANIZATION

2.1. Management structure

BeXyl Project is based on a management structure able to deal with the BeXyl's internal management and with the complexity of the high number of partners (31 partners) involved in the project execution as well as three different funding bodies (one from EU, UK and Australia partners respectively).

The organisation of the project management covers various aspects: strategic, technical and daily business issues. A schematic representation of the various levels of management activities is shown in the figure below.

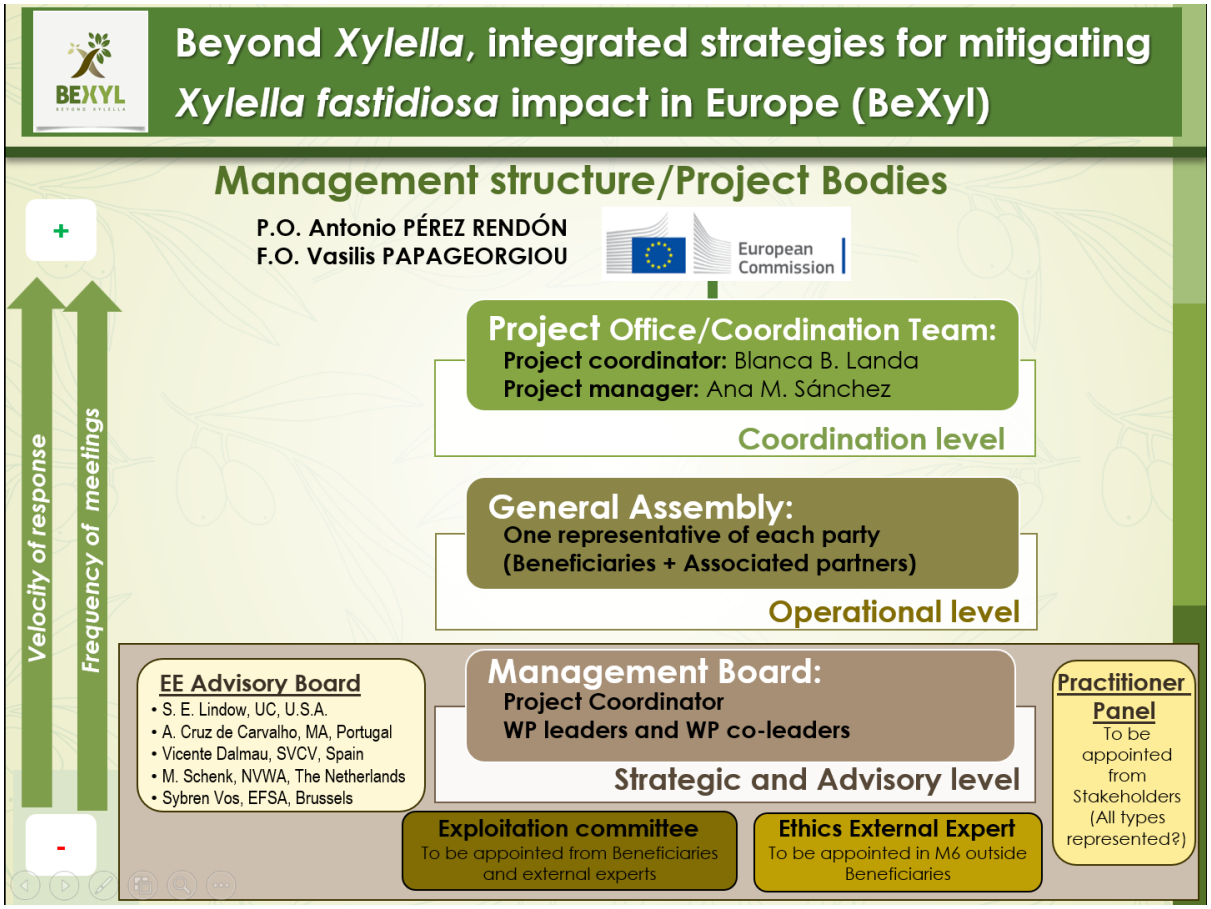


Figure 1. BeXyl Project Bodies

2.2. The Management Board (MB)

The MB will be body responsible for the execution and monitoring of the technical aspects of the project, acting as the interface between Work Packages leaders (WPLs) and the General Assembly (GA).

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The MB consists of the Project coordinator (PC), the Project Manager (PM) and the WPLs and Work Packages co-leaders (WPcoLs) (See section 2.6). The Management Board will meet at least every 6 months face-to-face (if is feasible) and on request by telematics conference.

The MB will represent the highest level of decision making within the project and will have the final decision of the overall project management. The MB will meet every 6 months in specific coordination meetings. These sessions will be the most relevant decision-making forum during the project. The mission of the MB within the project is:

- Management and delivery of the detailed planning of the tasks within their WP.
- To monitor the technical, scientific and commercial progress of the project against the Milestones and Deliverables on the basis of periodical reporting by the partners and to decide about the project progress, as well as on the need to implement necessary changes and new procedures.
- Preparation of all deliverables within their WP.
- Prepare the content and timing of press releases and joint publications by the consortium or proposed by the Granting Authority in respect of the procedures of the Grant Agreement and the Consortium Agreement.
- Reporting to the Coordinator regarding any risks associated with each Task within their WP.
- To evaluate the subcontractors' performance, if any.
- To solve conflicts on issues that might have an impact on project objectives, resources or progress.
- To organise technical meetings, as required.
- To coordinate exploitation and dissemination actions.
- To liaise with the EC regarding any contractual issues.

2.3. The Coordinator Team (CT)

The CT will be formed by the PC (Dr. Blanca B. Landa) and the PM (Mrs. Ana Sánchez), and will deal with the daily administrative issues of the project and maintain regular contact to insure adequate steering and management of the project.

The PC is the focal point for all technical and administrative content of the project and her responsibilities will be to:

- Organise and chair the consortium meetings (GAs, ME and EEAB meetings).
- Manage the EC contract.
- Ensure that the scientific content of deliverables and publications produced by the project meet the necessary requirements.
- Assess progress reports, new work plans and deliverables.
- Provide timely and efficient legal, contractual, financial and administrative support to the PM and EEAB.
- Maintain the interface with the Project Officer assigned by the EC.
- Maintain regular contact with the associated partners organisations.

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- Ensure global project coordination with the aim to meet the project schedule and objectives.
- Constantly monitor project progress and report potential problems to the MB, and the EC if needed.

The PC and PM as a team, will be responsible for the overall coordination of the project and specifically:

- Act as intermediary between the beneficiaries and the EC and will keep the EC informed of progress and will feedback views of the EC to the Consortium.
- Receive the financial contribution from the EC and ensure the timely circulation of the EC contribution to beneficiaries.
- Submit to the EC project reports, deliverables and financial statements.
- Keep accurate records identifying budget share allocated to each beneficiary and inform the EC of the distribution of funds and the date of transfer to the partners on an annual basis.
- Ensure the preparation, production and distribution of all deliverables of the Project.

2.4. The General Assembly (GA)

The GA will be the body responsible for supervising the project. The GA will provide a forum for discussion and making decisions on management issues as major modifications of the work plan, budget distribution, possible addition of new partners and will prepare requests for amendments to the EC. The GA consists of the PC and one representative per participant and will be chaired by the PC. The GA will meet, at least, once per year face-to-face (if it is possible) and on request by telematics conference.

2.5. The External EXPERT Advisory Board (EEAB)

To strengthen the credibility and external validity of the project an External Expert Advisory Board (EEAB), has been established as a representation of independent experts who will oversee the technical management as well as have access to project documents and outputs.

The EEAB will advise the MB and other project members on emerging risks opportunities that might develop during the project, and particularly provide critical feedback on the end-user needs and validate the scientific and technical outputs of the Project. The EEAB is composed of well-known senior scientists (named in WP10, Task 10.2):

- Prof. Steven E. Lindow, Emeritus Professor, UC (USA)
- Mrs. Ana P. de Almeida Cruz de Carvalho, MA (Portugal)
- Mr. Vicente Dalmau, SVCV (Spain)
- Mr. Martijn Schenk, NVWA, (The Netherlands)
- Mr. Sybren Vos, EFSA (Belgium)

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2.6. Work Package Leaders (WPL) and co-leaders

WPLs and WPcoLs will coordinate the work carried out in a specific Work Package (WP) and are responsible for the planning, monitoring and technical reporting of the progress in the WPs. The WPLs will organize technical meetings for that specific WP, as needed, facilitate the communication in and between WPs and will report to the MB and GA. The WPLs and WPcoLs are:

Table 1: Work Package Leaders and co-Leaders

WP	WP leader-Institution	WP Co-Leader-Institution
WP1	J. A. Navas-Cortés-CSIC	M. A. Jacques-INRAE
WP2	T. Vicent-IVIA	P. Zarco-UOM
WP3	F. Lanotte-CNR	J. Pages-ENA
WP4	O. Bahar-ARO-VOL	A. Belag- IFAPA
WP5	D. Bosco-UNITO	E. Quesada-UCO
WP6	E. Montesinos-UdG	S. Compant-AIT
WP7	G. Gilioli-UNIBS	D. Olmo-SEMILLA
WP8	C. Pollard-FCRA	J. Barreiro-JRC
WP9	D. Prestigiacomo-SMS	S. Sharrock-BGCI
WP10	B.B. Landa-CSIC	M. Saponari-CNR

WPLs will be responsible for the coordination and management of individual WPs. WPLs are responsible for the following tasks:

- Lead and monitor the project's technical progress and involve the partners whenever it is necessary.
- Ensure that the tasks under their responsibility are carried out timely and with the expected quality.
- To prepare progress reports in due time as requested by the PC.
- Monitoring of progress against the Milestones and Deliverables.
- To liaise with the PC, and the TLs and the Exploitation Committee (EC) members as necessary.
- Monitor and report on completed and starting tasks. Advise on the complementarity of tasks among WPs.
- To report any deviation from scheduled activities (due to any unexpected event or risk) which may affect the results.
- To prepare all deliverables within their WP.

Task Leaders (TLs) will be responsible for the timely completion of the tasks assigned to them. They should report to their WPLs and work jointly with all the partners involved in the completion of the task. TLs should be capable of providing technical feedback always, if required by the WPLs or the CT. The TLs institutions are:

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Table 2: Task Leader Institutions

WP	Task 1	Task 2	Task 3	Task 4	Task 5	Task 6	Task 7
WP1	INRAE	CSIC	AU/UC	CSIC	.	.	.
WP2	CRSFA	NIB	INRAE	CSIC	UOM	UNAPROL	IVIA
WP3	CSIC	CNR	IVIA/EPPO	ENA	.	.	.
WP4	ARO	CNR	ARO	IFAPA	.	.	.
WP5	UCO	UNITO	UNITO	CSIC	CSIC	.	.
WP6	CSIC	UdG	IVIA	.	.	.	.
WP7	UNIBS	CNR	CRSFA	IRFAP	UNIBS	.	.
WP8	CNR	FCRA	UCO/JRC	UCO	.	.	.
WP9	CSIC	IVIA	SURRENDER	IVIA	SURRENDER	.	.
WP10	CSIC	CSIC	CSIC	.	.	.	.

2.7. Practitioner panel (PP)

A Practitioner Panel (PP) will be appointed from representatives belonging to international and national Plant Protection and quarantine services, policymakers, growers, producers and nurserymen organizations, EIP-AGRI OG members and extension services. It will be formed once the project is funded. The PP will ensure that the Consortium considers the interests of the stakeholders and end-users and will support and facilitate the exploitation of the dissemination plan and the demonstration activities.

2.8. Exploitation Committee (EC)

An Exploitation Committee (EC) will be appointed, with members (experts in legal protection and commercialization) chosen within the Consortium and, eventually, external experts. The EC will be appointed at the start of the project to assist the partners to develop an Exploitation Plan with the mission or ensuring the best path to achieve the market uptake of the project results, through: i) identification and assessment of all the project results; ii) reporting the marketable project results; iii) preventing unapproved public disclosure of results by the RTD performers; iv) ensuring the quality of the protection strategy in accordance with the CA; and v) ensure adequate protection is in place prior to exploitation and dissemination.

The Consortium acknowledges the importance of IPR (intellectual property rights) and innovation management for research results developed within the project. EC will chair annual strategy and exploitation meetings, looking for connecting basic and applied science with end-users and companies.

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3. MANAGEMENT PROCEDURES

Three different kinds of communication are distinguished: internal, external and towards the EC.

3.1. Internal communication

Internal communication refers to the process of information exchange done by BeXyl consortium members between themselves and with the subcontractors in the framework of the project. Although the main decisions should be taken within Project meetings, through daily internal communication a high amount of project tracking is done. Therefore, procedures for the "registration" of the communications are defined. Communication must be traceable.

It is extremely relevant to avoid wasting time or create confusion contacting the wrong person. The general rules to decide whom to contact depends on the issue. These rules are written as if e-mail will be the preferred communication method:

1- If your question is related to the work to be carried out within a WP (or for several WPs as a joint task) contact the WP leaders. Only put in copy other colleagues if this is necessary. Avoid having as a rule e-mails with a large distribution list (e.g., all persons involved in the WP) unless that is strictly necessary. If there is the need to contact a large group of participants usually this is the responsibility of the PC or a WPL.

2- If you are working in a task within a WP, try to communicate with copy to all the participants of that particular task to allow tracking of the exchanged information.

3- If you have an issue that it is of general relevance to the project, contact the Coordinators Team (The PC, Blanca B. Landa and the PM, Ana Sánchez).

4- Remind that the European Commission regulates who is the only person to contact by the project officer; this is the PC. The only exception to this rule is that you have a specific, and relevant, claim on the PC.

5- In case of doubt how to proceed contact the PM (Ana Sánchez).

These rules are not intended to restrict the communication; they are aimed to minimize noise in the exchange of information among partners. So, you are absolutely free to contact any partner but use your common sense when deciding how many people needs to be in copy of a specific e-mail.

Communication Channels: Although other channels may be used, only "traceable" communications will be considered in the scope of the procedure. Informal day-to day communication will be conducted by the following means in the following preference order:

- e-mail (please use BeXyl as a reference on the subject field).
- Videoconference (to discuss particular issues).
- Cloud workplace: Storage service from CSIC (SACO; saco.csic.es) enabling the downloading of documents (BeXyl management). Contact with the PM for uploading documents. Detailed structure of the information is explained at Section 4.4 of this manual.

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- Phone calls.
- Communications through the above-mentioned channels will be encouraged.

3.2. External communication and dissemination

The objective is the dissemination of the individual and collective results (protocols, knowledge on hosts, bacterial strains, vectors, guidelines and tools for early detection and surveillance, etc.) in relevant international journals, the professional and national press, conferences, workshops and exhibitions/fairs, and to raise public participation and awareness by all partners.

Dissemination beyond the consortium will be undertaken by all Beneficiaries and associated partners, under the leadership of the PC, assisted by the Beneficiary P26-SURRENDER MS, that coordinates WP9. To ensure accurateness and harmonized policy for the communication, all scientific publications, press releases and dissemination materials must be approved by the MB before being released and published.

The procedure for managing all the communications activities delivered throughout the project development, will be detailed in the Deliverable D9.1 Dissemination, communication and exploitation plan.

It is essential to keep an updated record of all the communication activities delivered throughout the project development. A summary of the overall dissemination actions carried out (seminars, workshops, trainings, interviews, flyers, communication campaign, video/film, etc.) during each reporting period will be reported through the SyGMa portal by the PC. To keep records of all the diverse actions carried out by each Beneficiary a specific template (**Annex 1**) has been prepared using a 'Google Doc' form and must be filled periodically, every 6 months, by each Beneficiary and sent to the Coordinator.

Annex 1. Dissemination template

3.3. Communication with THE European Commission (EC)

The PC acts as the intermediary for all communications between the Beneficiaries and the EC. This task mainly involves correspondence with the Project Officer on matters related to:

- The preparation, completion and submission of periodic reports and Financial Statements (FS) for the consortium.
- The preparation, completion and submission of deliverables and project- and funding-related questions raised by the consortium that need explicit feedback from or agreement with the Project Officer.
- Activate the procedure for amendment(s) related to changes requested in Annex I and Annex II of the GA.

Additionally, the interaction between the Consortium, PC and Project Officer is mainly handled through the EC's grant management system for Horizon Europe called SyGMa. During the project's runtime SyGMa fully supports the grant management related to the submission of deliverables and reports, to payment execution and audit implementation as well as to

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potential amendments. In SyGMa, partners can also download the signed PDF version of the GA and have an overview of relevant project information. The digital sealing of documents complements this paperless exchange through SyGMa, allowing digital signatures for most legal transactions.

3.4. Meetings

Collaboration is dependent on good communication and encouraging empathy at all levels. Partners communicate better if they have met each other in person. Therefore, a series of meetings will be held during the project execution. Project meetings are confidential and therefore participation is restricted to the members of the consortium, unless in circumstances where subject field specialist have been invited to attend workshops. A proposal of a schedule with the major face-to-face meetings is shown:

Kick-off meeting. The Project Coordinator organized a kick-off meeting at the start of the project, with the presence of representatives of most partners. This meeting was organized in Córdoba, Spain, the 17th-19th October 2022 and it included a one field day, visiting an olive nursery and a commercial farm. Finally, the IAS-CSIC facilities involved in *Xylella fastidiosa* research were also visited.

Management Board meetings. Interactive management by regular MB meetings (at least every 6 months) plays an important role in the communication strategy. The communication strategy aims to keep all the partners fully informed about the project status, the planning and all other issues which are important to the partners to obtain maximum transparency for all involved and to increase the synergy of the cooperation. The MB meets regularly, in person or by telematic conferences, to ensure a timely and effective discussion on overall technical progress as well as technical issues. The PC chairs the MB and its meetings and is responsible for the agenda and meeting minutes.

General Assembly meeting. A GA meeting will take place at least once a year. This meeting will, if possible, coincide with major project events (e.g., contractual reviews, major milestones or decision moments, modifications to the project having a major impact), conferences or congresses. The PC chairs the GA meeting.

Stakeholders meetings. In line with the multi-actor approach of the project, the consortium will oversee the celebration of periodic stakeholders' meetings that will take place at some of the participant countries through the BeXyl co-operator network.

Work Package meetings. Work Package meetings will be organized to discuss technical issues and to monitor and track the technical progress of the WP. Each WP has a number of deliverables and milestones due at certain dates. The WPL coordinates the WP meetings with the assistance of the WPcoL and TLs and is responsible for the agenda.

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Workshops. Workshops will be arranged where necessary to discuss specific technical issues, with attendees in varying configurations, to synchronize dependent tasks, within a WP as well as between WPs. They will be preferably coordinated with WP meetings and, when possible, will be open to other scientist and stakeholders.

Telematic meetings. Telematic meetings will be the preferred way of meetings to deal with the day-to-day coordination of the project. They will also be used to keep track of WP progress among WP members in periods between face-to-face meetings.

Project Review meetings. The Project Review meeting will take place on request of the Project Officer of the European Commission (EC), at the end of the first reporting period in line with EC procedures. During this meeting, the technical progress of the project is evaluated by the Project Officer and external auditors, who are experts in the field. The Project Officer together with the PC and PM determines the date, agenda, duration and location.

3.5 Management of publications

BeXyl partners will publish the results they consider relevant (according to the IPR protection strategy and to the GA and the CA) in the scientific literature, dedicated journals and magazines. Publications must follow the following provisions according to the statements included in the CA and GA:

Prior notice of any planned publication shall be given to the other Parties at least 45 calendar days before the publication. Any objection to the planned publication shall be made in accordance with the Grant Agreement in writing to the PC and to the Party or Parties proposing the dissemination within 30 calendar days after receipt of the notice. If no objection is made within the time limit stated above, the publication is permitted.

Where possible, beneficiaries have to publish (with no costs) in Open Research Europe, the European Commission open access publishing platform.

Beneficiaries must ensure open access (free of charge online access for any user) to peer reviewed scientific publications relating to their results. In particular, they must ensure:

- At the latest at the time of publication, a machine-readable electronic copy of the published version or the final peer-reviewed manuscript accepted for publication, is deposited in a trusted repository for scientific publication.
- immediate open access is provided to the deposited publication via the repository, under the latest available version of the Creative Commons Attribution International Public Licence (CC BY) or a licence with equivalent rights; for monographs and other long-text formats, the licence may exclude commercial uses and derivative works (e.g., CC BY-NC, CC BY-ND).
- Information via the repository about any research output/tools/instruments needed to validate the conclusions of the scientific publication.

Beneficiaries (or authors) must retain sufficient intellectual property rights to comply with the open access requirements.

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Metadata of deposited publications must be open under a Creative Common Public Domain Dedication (CC 0) or equivalent, in line with the FAIR principles.

Only publication fees in full open access venues for peer-reviewed scientific publications are eligible for reimbursement.
Some of these repositories include:

- The Digital Research Object Portal (DROP) managed by P20-EPPO
- The Coordinator institutional Repository P1-CSIC: DIGITAL.CSIC
- Partners institutional repositories (e.g., P2-IVIA: ReDivia, etc.)
- Zenodo, etc.

All beneficiaries must inform to the PC within 5 days of the acceptance of any scientific publication. In addition to the article file, a template with all relevant information on the publication will be send to the PC (Type of publication, Authors, Publisher, Journal or equivalent, open repository where it has been deposited etc.). To facilitate this, each Beneficiary must fill a specific template (**Annex 2**) using a 'Google Doc' form to submit this information to the CT.

Annex 2. Publication template

With this information, a link to the institutional repository will be published on BeXyl website and on Funding&Tender Portal.

4. DOCUMENT MANAGEMENT

Documentation stands for the set of files related to the work carried out under the BeXyl Workplan by the project consortium. Documentation will not be limited, but should follow agreements reached in the project meetings (conclusions and tasks on the minutes), in formal communications or at least in bilateral meetings between partners. Circulation of documentation will be defined in the same manner. The Documentation will be intended to be used internally by the consortium and following the dissemination rules stated by the Grant Agreement with the EC.

Templates for specific documentation (Deliverable, Periodic Reports, Financial template and Minutes) are annexed to this document.

Versions of all these templates will be included in the project repository. BeXyl management files may be accessed through the cloud of the project at the saco.csic.es folder. The organization of this folder is as follows:

- Consortium
- Official documents
- Meeting
- Deliverables
- Milestones

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- Dissemination
- Templates

CT will provide general documents and participants may share their documentation through this way.

4.1. Format

Documentation will be circulated in formats compatible with MS Office.

Language used will be English. Document must be written with font 'Calibri', size 12 for text and 18,16,14, 13 for Titles; single line spacing; Justified in long paragraphs - Align left in single line or short paragraphs; 1 line spacing between paragraphs; no other spacing before or after paragraphs.

Bulleted lists:

- Item
- Item
  - Item indent

Titles:
Calibri (Cuerpo) (included in this document)
13 to 18 pt - Single line – apply double line spacing – remove bold.

1 HEADING LEVEL 1

This is some text.

1.1 Heading level 2

This is some text.

1.1.1 Heading level 3

This is some text.

Heading level 4
This is some text.

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Tables:

Table 1: Table caption (above table).

COLUMN HEADING 1	Column Heading 2	Column Heading 3	Column Heading 4
ROW LABEL 1	1	1	1
ROW LABEL 2	1	1	1

Figures:



Figure 1: Figure caption (below figure).

The figures must not exceed the text dimensions. Should you wish to rotate a figure, please click on Format > Rotate and choose the type of rotation you would like to apply.
Refer to as Figure 1 and Table 1 within the main text.

4.2. Codification of documents

The codification of documents tries to clearly identify a relevant set of information: the type of documentation, the deliverable it contributes to, and the author/responsible and version. Files will be identified (named) according to the following structure:
BeXyl_Identification_ filename_version.extension

Where:

- **Identification**: A code that will identify the direct destination of the information included. Below are shown the identification codes considered:
  - AGENDA: Agendas of the different project meetings (further comments by e-mail with no codification needed, only reply mechanisms).
  - MINUTES: Minutes of the different project meetings (further comments by e-mail with no codification needed, unless otherwise considered). A template for minute documents is provided as Annex 4.
  - D#: Information belonging to direct work in the deliverable # (where # indicates the number).
  - PR#: Contributions to Progress Report # (including cost statements).
  - PUB: Documentation addressed to direct dissemination/publication.

- **Filename**: Non-restricted name. Just what the author considers a logical name. Only one rule will be stated: assembled versions (both intermediate and final) of Ds and PRs will not have name.

- **Version.extension**: Two-digit code identification the document version:

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- Intermediate versions: v1 to 09
- Final versions: deF
- Further modifications to final versions: deF 1 to 99

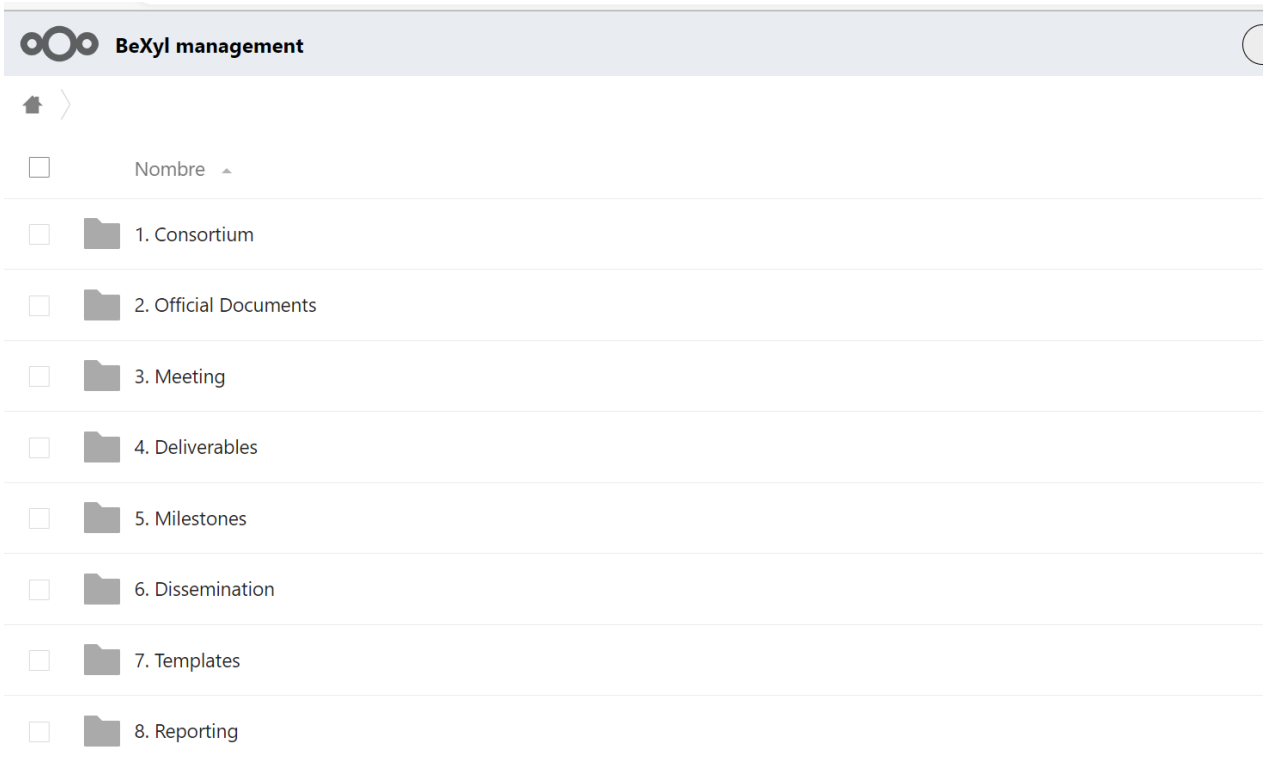
Examples:

Final version of D1.1: BeXyl_D1.1_deF.doc
Intermediate version of D 2.2: BeXyl_D2.2_v4.doc
Progress Report 2 (first version): BeXyl_PR2_v1.doc
Progress Report 2 (final version): BeXyl_PR2_deF.doc
Minutes of the meeting (final version): BeXyl_MINUTES_KOM_deF.doc

4.3. Availability and storage of documents

The latest version of the official documents (Deliverables, Project Reports, agenda, Minutes, etc.) will be available through the SACO repository (BeXyl management). This access will be necessary for downloading and reading documents. In case you need to upload any documents contact with the PM, and she will upload it in your name.

The structure of the BeXyl management repository includes the following folders:



All relevant information will be available at these folders as it will be continuously updated.

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5. PERIODIC REPORTING AND PROGRESS MONITORING

The reporting will be used to track project progress and identify rapidly problems and risks, in order to enforce pro-active management. It will also help to address the requirements for the external reporting and to meet the short contractual deadlines. Reporting will gather information on:

- Main activities carried out during the period to report.
- Status of milestones and deliverables.
- Problems encountered and risks identified.
- Dissemination activities performed during the period.
- Resource consumption.
- Results achieved.
- Meetings attended, etc.

5.1. Project Deliverables

BeXyl project foresees the preparation of 43 deliverables throughout the project lifecycle. All deliverables prepared in BeXyl, before being submitted to the European Commission, must undergo an official review by the PC (Project Coordinator). This review process applies to both types of deliverables defined in the project description of action (DoA): "Report" (Document, report, excluding the periodic reports and final report) and "Other" (Computer programs, data models, website, etc.).
Each deliverable has a lead partner who will:

- Be responsible for collecting contribution and drafting the document (the WPL)
- This will be forwarded to the WPcoL and the PC in advance of delivery for comment and consultation prior the formal submission in due time.

This process is further organized in the following actions (Table 3):

Table 3: Preparation and delivery procedure of project Deliverables

ACTION	Timing before the deadline
The WPL start to collect the information and draft the document contacting the TLs and researchers participating in the task(s) providing information for the deliverable	8 weeks
The draft is sent to the PC and WPcoLs and some experts within the consortium for comments	5-6 weeks
The PC will send the comments back to the WPL	5 weeks (major revision)* 4 weeks (minor revision)
The WPL integrates reviewer's comments and send the pre-final version to all the members involved	4-3 weeks

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The WPL integrates comments from all the members participating in the deliverable and sends the final version to the PC for submission	3-2 weeks
The PC checks if all comments have been applied and approves the deliverable*	2-1 weeks
The PC submit the deliverable to the EC throughout the Funding&Tenders portal	1-0 weeks
The document is deposited in the reserved area and/or public available on the website	After the submission

(*) In case of fundamental disagreement, the PC will decide how to perform by looking for an external expert, the EEAB or consulting at the MB level.

To prepare a deliverable report a uniform template (**Annex 3**) has been prepared and shall be used by the WPLs when preparing it.

Annex 3 – Deliverable template

5.2. Periodic report

To ensure the correct implementation of the project and to avoid possible deviations, the PC will request a report on the progress carried out so far in the tasks of the project (containing technical and financial progress). The template of the progress report can be found in the document repository (**Annex 4**). After all the contributions have been gathered and integrated, the coordinator will circulate the integrated version of the document. If in one-week time, no comments have been produced, the document will be promoted to version 'deF' and considered as final version.

These progress reports will facilitate and support the elaboration of the EC Periodic Reports.

The reports have to be prepared in line with the Grant Agreement and the Consortium Agreement of all beneficiaries. BeXyl will deliver the following reports for the monitoring and quality control of the project, by the EC and the PC:

- One Periodic Report for each reporting period.
- One Final Report providing an overview of the whole duration of the project.

Considering that each report is due to the European Commission within 60 days from the end of the relevant reporting period, the following reporting procedure (reporting periods and reports) is suggested:

- **1st reporting period** -> due by end M18 (28/2/2024) + 60 days (30/4/2024)
- **2nd reporting period** -> due by end M36 (31/08/2025) + 60 days (31/10/2025)
- **Final Report**-> due by end M48 (31/08/2026) + 60 days (31/10/2026)

See Annex 4 – Periodic report template

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5.2.1. Structure of the Periodic Report

The periodic report must be submitted by the coordinator within 60 days following the end of each reporting period. It contains the periodic technical and financial reports.

The periodic technical report consists of two parts:

- **Part A** of the periodic technical report contains the cover page, a publishable summary and the answers to the questionnaire covering issues related to the project implementation and the economic and social impact, notably in the context of the Horizon Europe key performance indicators and the Horizon Europe monitoring requirements. Part A is generated by the IT system. It is based on the information entered by the participants through the periodic report and continuous reporting modules of the electronic exchange system in the Funding&Tender Portal. The participants can update the information in the continuous.
- **Part B** of the periodic technical report is the narrative part that includes explanations of the work carried out by the beneficiaries during the reporting period. Part B needs to be uploaded as a PDF document following the template of Part B Periodic Technical report.

The periodic financial report consists of:

- Individual financial statements (**Annex 4**. Periodic report) for each beneficiary.
- Explanation of the use of resources and the information on subcontracting and in-kind contributions provided by third parties from each beneficiary for the reporting period concerned.
- A periodic summary financial statement including the request for interim payment.

5.2.2. Preparation and submission of periodic report

Continuous reporting functionality in the F&T portal: it is activated at the time the project starts and it is continuously open for the beneficiaries to submit deliverables, to report on progress in achieving milestones, to follow up of critical risks, ethics issues, publications, communications activities, and the answers to the questionnaire on horizontal issues.

Periodic reporting functionality in the F&T portal: following the end of each reporting period the functionality of periodic reporting in the F&T Portal will be activated. While the periodic reporting session is open in the electronic exchange system:

- Each participant will be able to complete on-line their own Financial Statement (and the financial report of their Third Parties, if any) including the explanations on the use of resources.
- The PC will be able to upload the Part B of the periodic technical report as a pdf document.
- When the coordinator submits the periodic report, the IT tool will capture the information from the continuous reporting module to generate the Part A of the periodic technical report. The IT tool will consolidate the individual financial statements and will automatically generate the report with explanations of the use of

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resources and the periodic summary financial statements, which corresponds to the request for payment.

The periodic technical report will be 'locked for review' by the PC before its submission. Make sure the information in the continuous reporting module is up-to-date before the periodic report is 'locked for review'. Updates entered after this step will be included in the periodic report of the following period.

5.3. Financial management

The following section sets out a number of financial rules applicable to EC funded projects and which apply to BeXyl.

Actual Costs: BeXyl is a cost-sharing contract, which is based on the actual costs incurred for the work under the project. No estimated, budgeted or imputed rates are allowed. Neither the Coordinator nor partner beneficiaries can make any kind of financial profit from their participation in this project. The amounts that have been negotiated for the technical annex are only estimates and as such they cannot be claimed as actual costs. The fact that the European Commission will make periodic payments for the costs claimed does not mean that these costs have been accepted. Costs can be considered as definitively accepted only after a Review or after expiration of a period of 5 years after the completion date or the termination of the contract.

Indirect costs identification: BeXyl follows the HE financial rules. According to them, indirect costs are costs that are not directly linked to the action implementation and therefore cannot be attributed directly to it. The EC will consider a 25% of the direct costs, except subcontracting, as a flat rate corresponding to the indirect costs.

Time sheets: All partners must keep a record, on a regular basis, of all the days spent on the project by their staff, including the personnel completely devoted to the project (100% of their working time). The actual number of days spent on the project must be stated in the progress reports and in the cost statements. The absence of time sheets may make it impossible for the European Commission to contribute to the costs claimed for labour.

Horizon Europe use a daily rate calculation (not hourly) and defines the number of working days per year as 215. The official EC template is available at **Annex 5**. Time sheet template. These general rules are for partners whose organisations do not have their own time sheets. Please make sure the procedure of your own organisation because sometimes it is stricter than that of the EC.

See Annex 5 - Time Sheet template

Justification of Costs: All the documentation to support and justify the costs reported must be kept in order and made available for audits.

Extension of obligations under the GA to subcontractors: The EC has established that certain obligations under the GA that has to be extended to the subcontractors working for BeXyl.

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The DoA contains the initial planning for the total project duration. The Person Months (PM) allocated in every task have been translated into the provisional planning of their resource consumption per year, with regards to the timeline of the specific tasks a partner is involved in. The actual costs will be compared to the budget plan and the resource consumption will thereby be controlled.

The template prepared by the PC will contain tables for collecting the data on PMs, Name of person involved, Description of Action and EURO spent over the months corresponding to the reporting period. The Project Coordinator will copy these figures into a budget follow-up file for each period and consolidate the figures at the integrated project level.

5.3.1. Financial Reports

It is a responsibility of the PC to send to the European Commission three financial reports for the referenced period. It is the obligation of each partner to request in advance clarification of any expenses that might not correspond to one clearly defined in the grant agreement, to clarify with the Coordination Team if this is an eligible cost. Should any doubt arise; the PC will clarify it with the European Commission and will inform the entire consortium –if required- about the answer. Each partner should send a draft (by e-mail) version of their Financial statement (**Annex 6**) to the PC. A review will be carried out in order to ensure minimum number of mistakes and maximum coincidence with the European Commission rules and criteria.

See Annex 6- Financial Template

5.3.2. Preparation of Financial Statements and Certificates

PC will submit their Financial Statements (Form C) periodically (Month 18, 36 and 48).

Form C describes cost declarations for a Beneficiary in a consortium. It contains information such as:

- Information about the Beneficiary.
- The declaration of costs.
- The declaration of receipts.
- The declaration of cost details (cost, explanation, work package).
- The requested EC contribution.
- The final Form C will also contain: the audit certificate declaration for final report.

This process is further organized in the following tasks:

1. Each partner's LEAR will nominate a person authorised to sign Form C (FSIGN) in the "My organizations" tab, through the "MP" icon (F&T Portal).
2. Each Beneficiary fills its corresponding Form C.
3. Once Beneficiary Form Cs have been created and completed in the European Commission Platform, the FSIGN electronically signs and submits Form C to the PC.
1. Actions 1 and 2 must be performed in by the 30 following days after the closure of the corresponding reporting period.

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4. The PC reviews Form C and may reject it if some deviations are detected.
5. Once corrected, the beneficiary sends again the Form C to the PC.
6. Once all Forms C from beneficiaries are approved by the coordinator the PC sends all the information from the consortium to the European Commission.

Actions 4, 5, and 6 must be performed in by the 30 following days after the reception of the first draft of the Form C. Deadline for submission of reporting period is 60 days after closure of reporting period.

7. After submission by the PC of the Forms C package to the European Commission, a digitally signed eReceipt is issued on each Form C and another one is issued for the whole package.
8. Once submitted to the EC, Form Cs are only available to the PC and Beneficiaries in read-only format.
9. The European Commission will review all the Forms C and may reject some expenses. Each beneficiary must correct the information following European Commission's suggestions, and send the corrected Form C to the POC, who will review it and send it again to the European Commission.

Finally, and after the reception of the final reports, and the corresponding approvals from the European Commission, the payment is expected to be delivered to the PC within 90 days after closure of reporting period. The PC will then proceed to the payments for each beneficiary.

5.4. Project Minutes

All GA and MB meetings celebrated in BeXyl, must have minutes of the meeting. This is one of the ways to share decisions and relevant information to the Consortium. If PC or WPLs consider necessary writing the minutes for any other meeting they can provide it. A template for Minutes presentation is shown in **Annex 7**.

See Annex 7- Minutes Template

5.5. Presentation template

The presentations at the project meetings, or at any and dissemination and communication activities must be performed using the Presentation template (**Annex 8**).

See Annex 8- Presentation Template

6. HANDING OF EXCEPTIONS

All the Partners should follow the recommendations and procedures defined in this Operational Manual. However, there may be cases where decisions cannot be made or actions cannot be undertaken according to the defined rules.

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Any major change in the rules and recommendations set out in the Project will have to be decided in accordance with the following procedure:

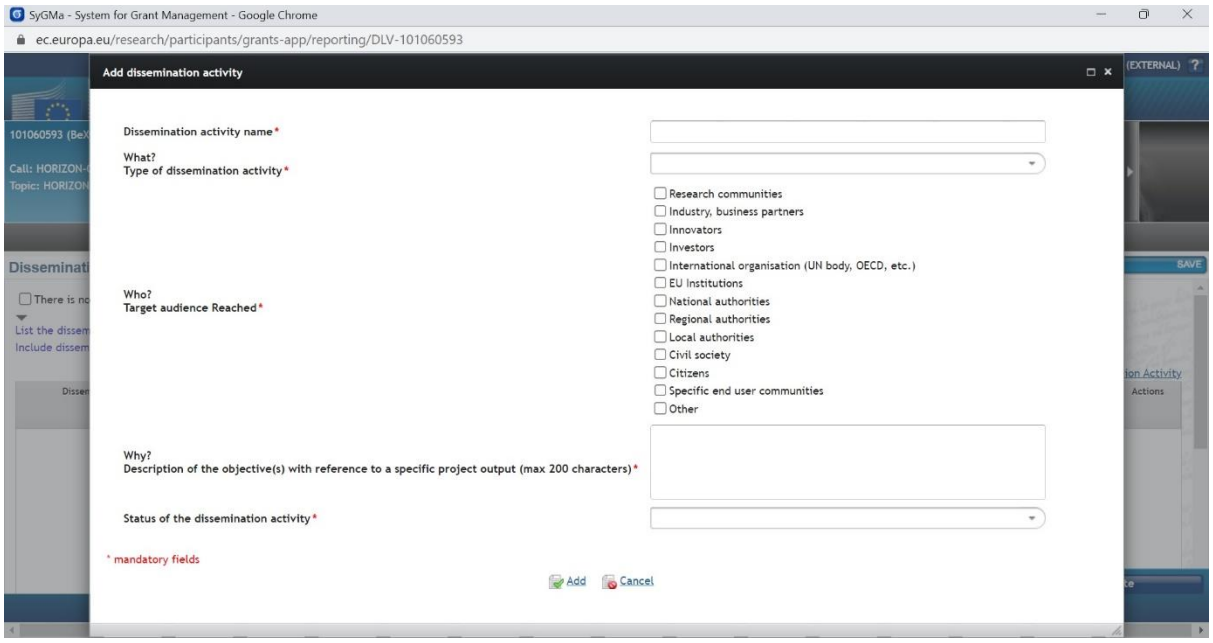
- Proposal for actions and clear justification will be sent to the PC defining risks and benefits for the project.
- If the PC considers that the proposal for actions does not constitute any risks for the successful achievement of the project, she will accept the proposal.
- If the PC considers that there may a risk for the project, she will submit the decision to the MB members, who will be required to vote by a fixed deadline. Simple majority will make decisions.

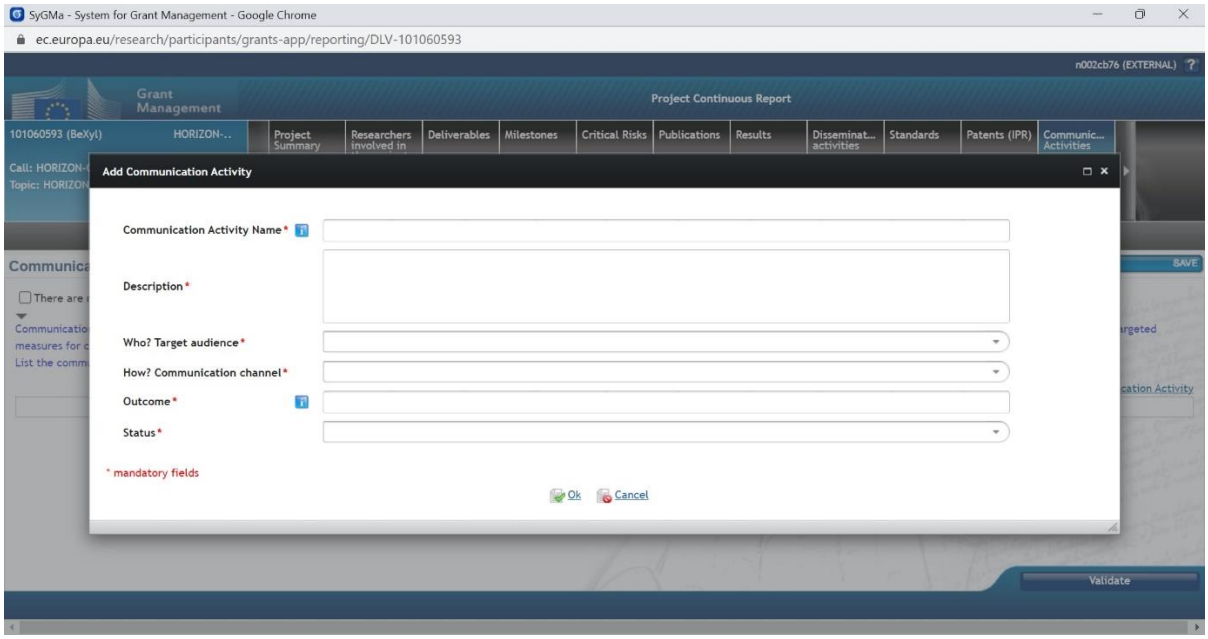
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Annexes

ANNEX 1. DISSEMINATION TEMPLATE

For notification of all dissemination and communication activities at SyGMa, an online form must be filled (See screenshots below):

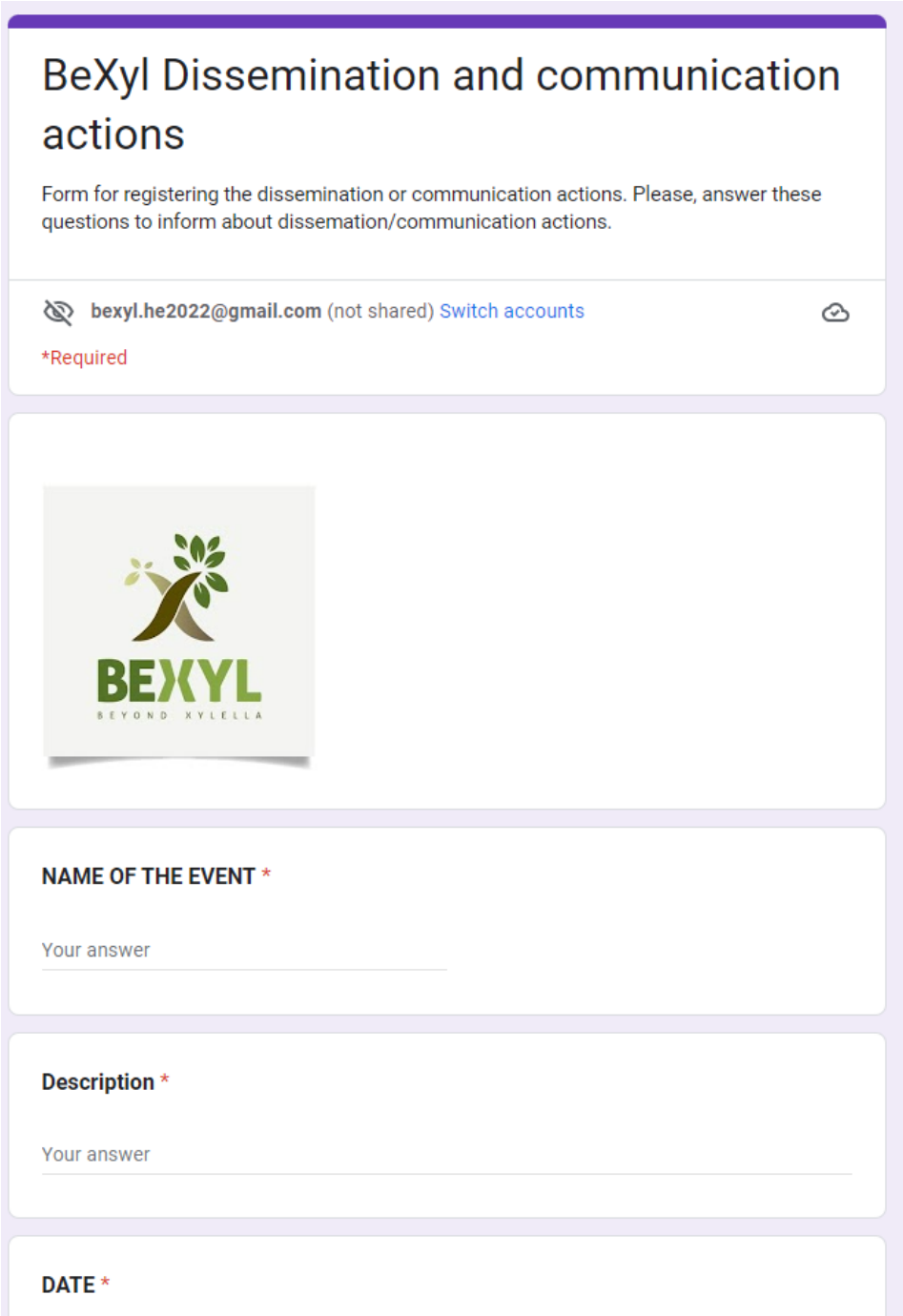




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To facilitate the process of notifying the dissemination activities, the CT will upload this information into the Funding&Tenders portal. For that each partner must fill a 'Google doc' form. This form can be accessed through this link:

https://forms.gle/V3fdAPdERfPM9Bdp8



BeXyl Dissemination and communication actions

Form for registering the dissemination or communication actions. Please, answer these questions to inform about dissemation/communication actions.

bexyl.he2022@gmail.com (not shared) Switch accounts

*Required

NAME OF THE EVENT *

Your answer

Description *

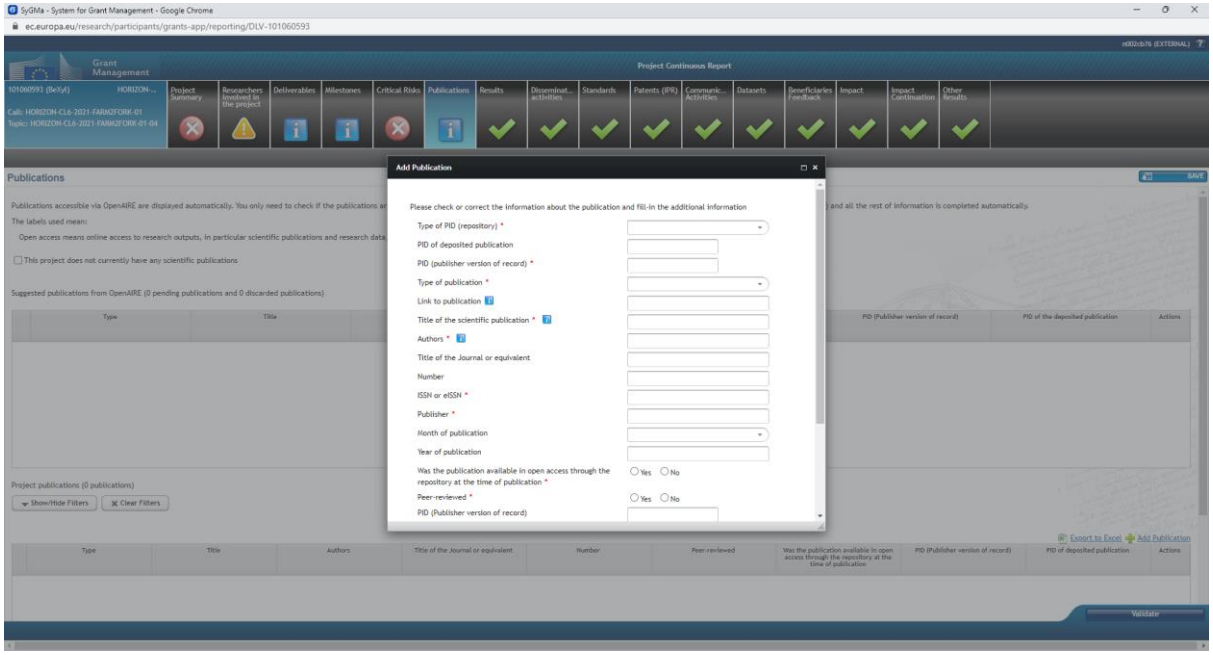
Your answer

DATE *

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ANNEX 2. PUBLICATION TEMPLATE

For notification of publication activities at SyGMa, an online form must be filled (See screenshots below):



To facilitate the process of notifying the publications, the CT will upload this information into the Funding &Tenders portal. For that, each partner must fill a 'Google doc' form. This form can be accessed through this link:

https://forms.gle/iEVwNZpYJYfwasWv8

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BeXyl. Publication activities

Form for registering the publication activities. Please, answer these questions to inform about publication related to BeXyl project.

bexyl.he2022@gmail.com (not shared) Switch accounts

*Required

Link (DOI/URI...) of deposited publication *

Your answer

Link (DOI/URI...) publisher version of record *

Your answer

Type of publication *

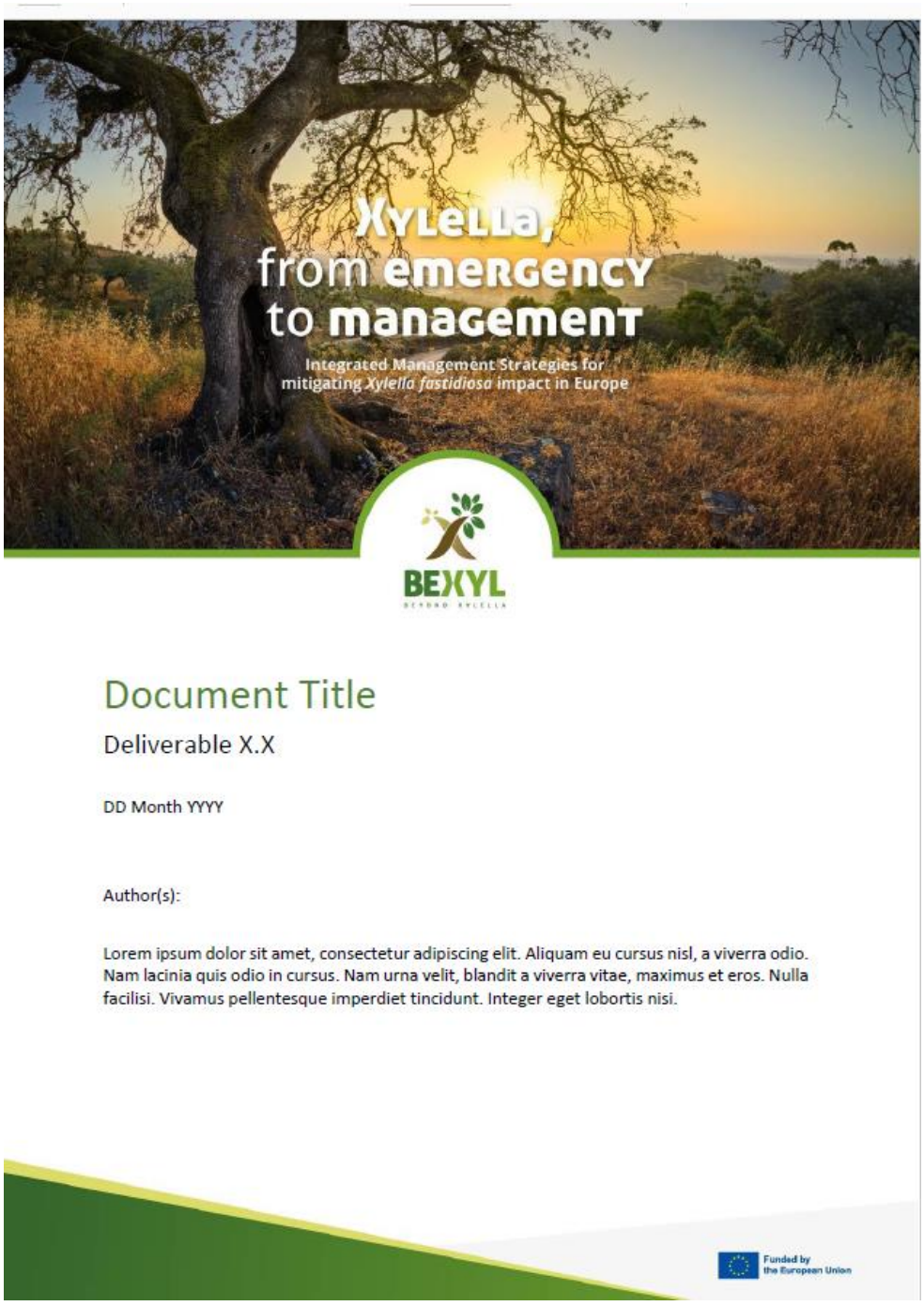
Choose

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ANNEX 3. DELIVERABLE TEMPLATE

To find a digital version of the template:

Deliverable template

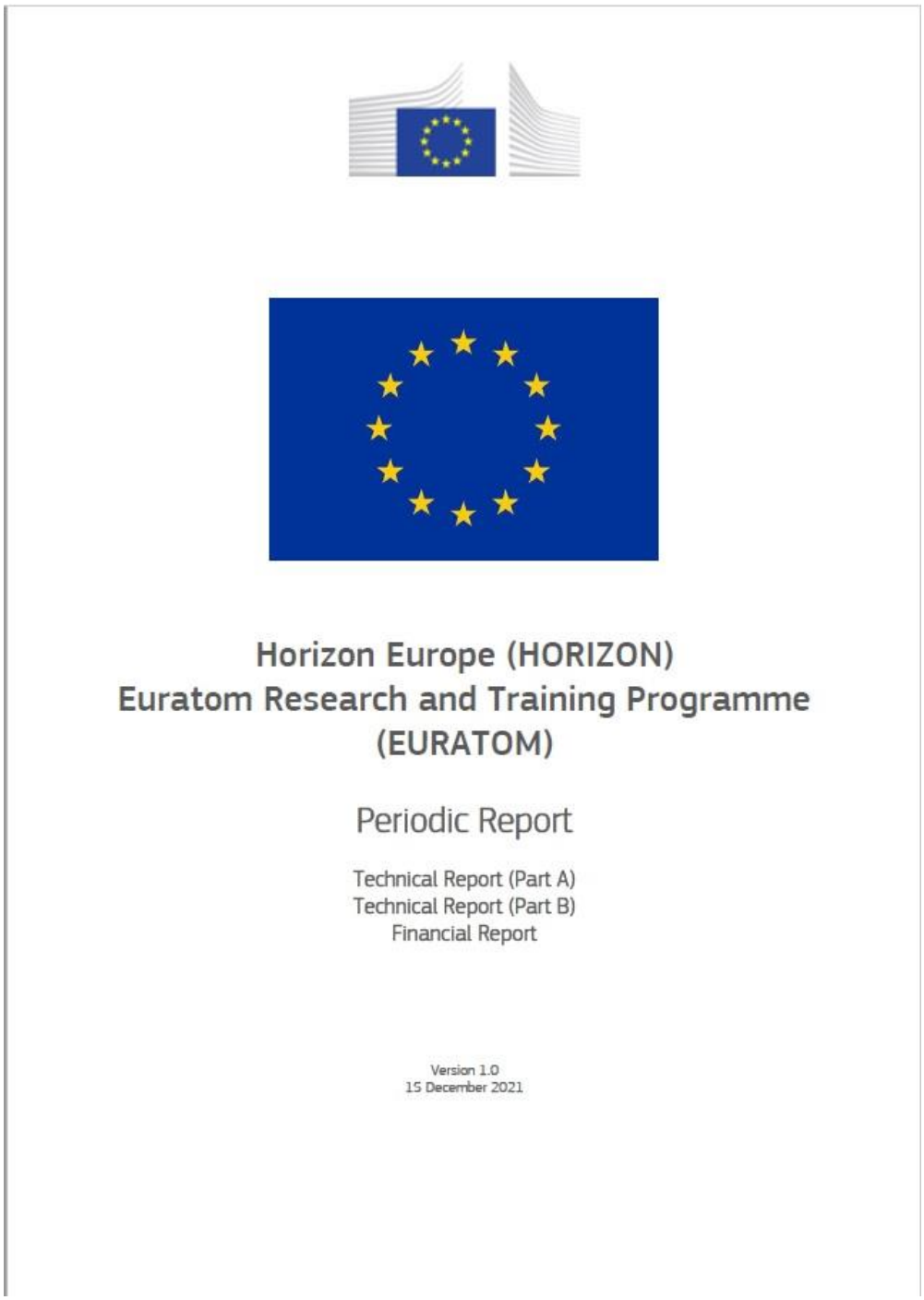


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ANNEX 4. PERIODIC REPORT TEMPLATE

PART A must be filled at the Funding&Tender portal directly and PART B uploading the following document.
To find a digital version of the template:

Periodic Report template



Horizon Europe (HORIZON)
Euratom Research and Training Programme (EURATOM)

Periodic Report

Technical Report (Part A)
Technical Report (Part B)
Financial Report

Version 1.0
15 December 2021

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ANNEX 5. TIME SHEETS TEMPLATE

To find a digital version of the template:

Time sheet template

Project: [insert number] — [insert acronym] — [insert call identifier]

EU Grants: Time declaration: V1.1 – 01.05.2022

EU GRANTS DECLARATION OF DAYS WORKED ON A PROJECT *To be kept on file in case of audits.*	YEAR:	

Project acronym:		Project number:	
Participant name:			
Name of the person:		Type of personnel: (employee/ natural person under direct contract/ seconded/ other)	

Month	Days worked in the action[1] (e.g.15, 7,5, 0,5)	Work Packages worked on (e.g. WP2; WP5)	Date and signature of the person	Name, date and signature of the supervisor
January			Signature: Date:	Name: Signature: Date:
February			Signature: Date:	Name: Signature: Date:
March			Signature: Date:	Name: Signature: Date:
April			Signature: Date:	Name: Signature: Date:
May			Signature: Date:	Name: Signature: Date:
June			Signature: Date:	Name: Signature: Date:
July			Signature: Date:	Name: Signature: Date:
August			Signature: Date:	Name: Signature: Date:
September			Signature: Date:	Name: Signature: Date:
October			Signature: Date:	Name: Signature: Date:
November			Signature: Date:	Name: Signature: Date:
December			Signature: Date:	Name: Signature: Date:
TOTAL				

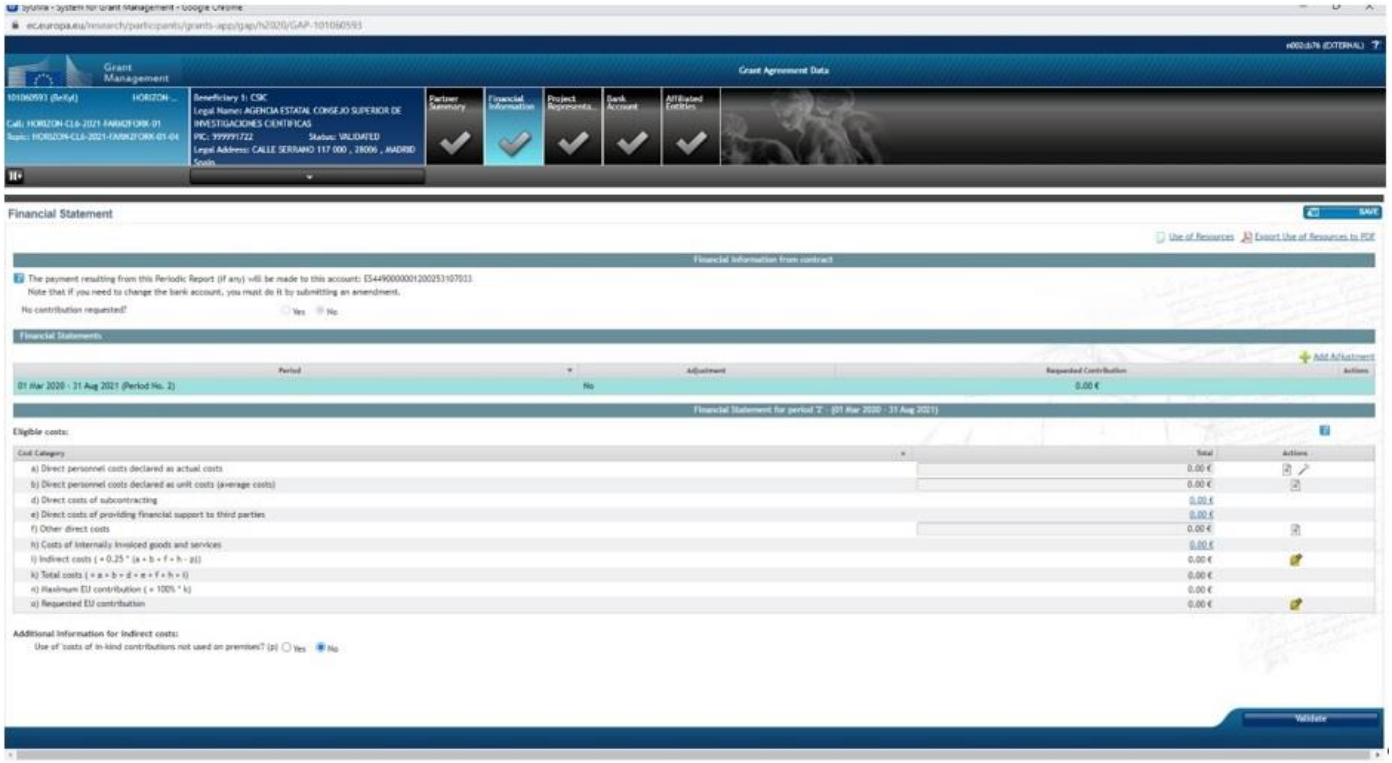
[1] 1 day = number of hours that a full-time employee of the participant has to work in a standard day (e.g. 8 hours).

1

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ANNEX 6. FINANCIAL TEMPLATE

This information must be filled up on-line by each partner at the Funder&Tender portal through SyGMa.

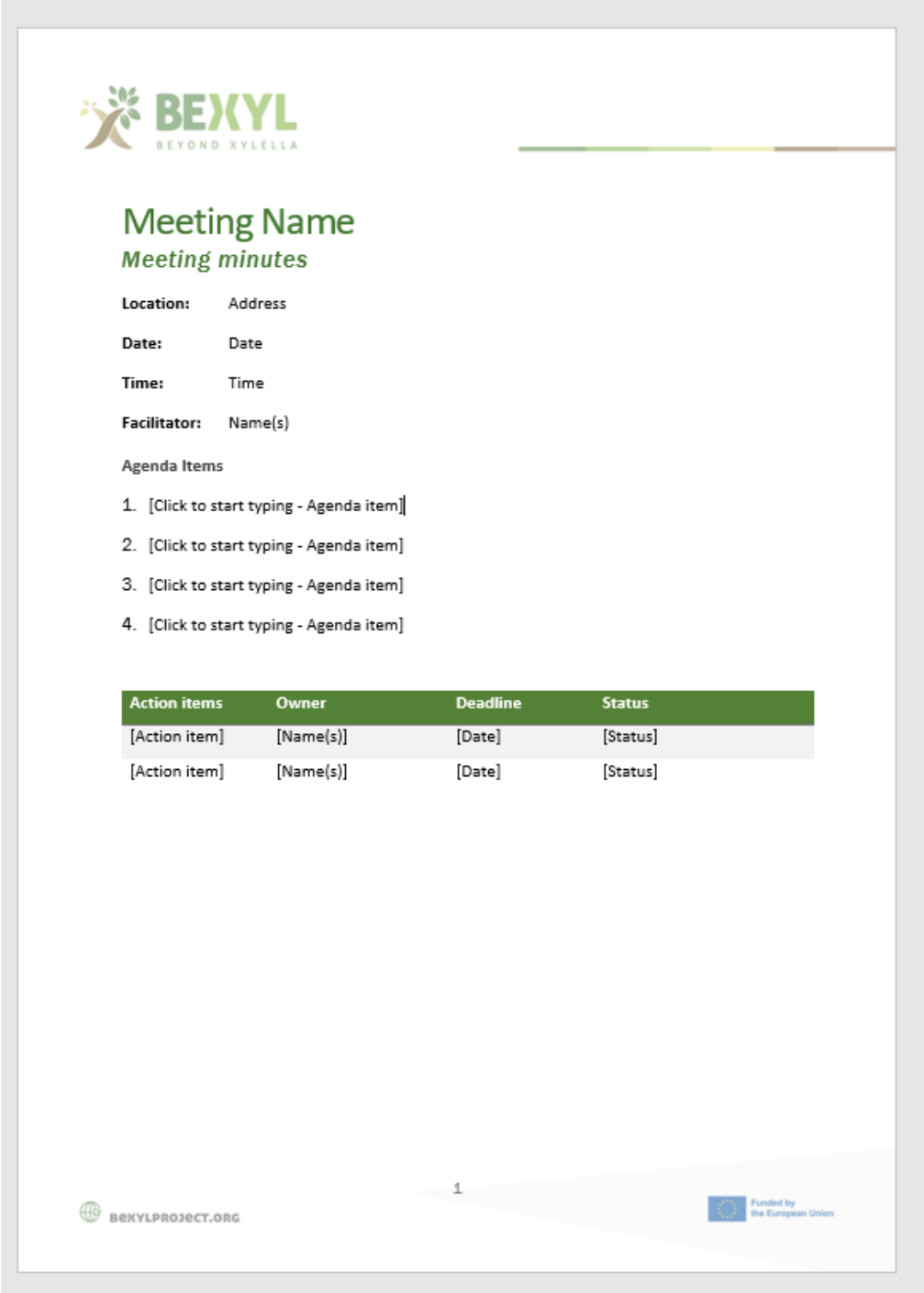


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ANNEX 7. MINUTES TEMPLATE

To find a digital version of the template:

Minutes template



Meeting Name

Meeting minutes

Location: Address

Date: Date

Time: Time

Facilitator: Name(s)

Agenda Items

1. [Click to start typing - Agenda item]
2. [Click to start typing - Agenda item]
3. [Click to start typing - Agenda item]
4. [Click to start typing - Agenda item]

Action items	Owner	Deadline	Status
[Action item]	[Name(s)]	[Date]	[Status]
[Action item]	[Name(s)]	[Date]	[Status]

1

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ANNEX 8. PRESENTATION TEMPLATE

To find a digital version of the template:

Presentation template



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