



## ***Edge AI Technologies for Optimised Performance Embedded Processing***

### **D8.1 Project Handbook and Quality Assurance**

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## 1 Publishable summary

Deliverable D8.1 “Project Handbook and Quality Assurance” is produced within Work Package 8 (Coordination and Operational Management) of the KDT JU EdgeAI project, under Task8.1 - Project Coordination.

This deliverable is an internal KDT JU EdgeAI project document that covers the guidelines and rules related to the coordination and management of the project.

## 2 Non-publishable summary

The “Project Handbook and Quality Assurance” (PHQA) aims supporting the KDT JU EdgeAI project partners through the project’s different activities and it complements the contents of the project Consortium Agreement (CA) and the Grant Agreement (GA). It serves as a reference to identify roles and responsibilities during the KDT JU EdgeAI project duration. Furthermore, the handbook identifies the procedures related to the project’s execution, communication, describes the wide management processes, rules, and tools to be applied throughout the KDT JU EdgeAI project. Based on the experience resulting from numerous other large European Commission (EC) funded projects like ECSEL JU AI4DI, ECSEL JU AI4CSM the document covers the following aspects:

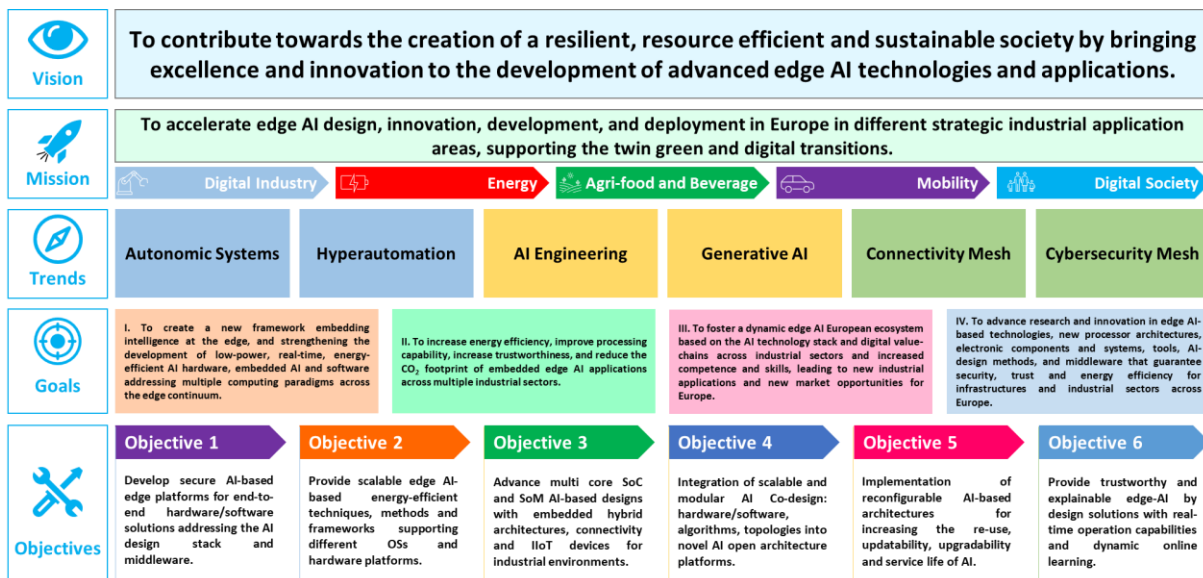
- The detailed definition and description of the roles of the management- and decision making- bodies.
- The detailed definition and description of the roles of the individual Work package leaders (WPLs) and Value Chain leaders (VCLs)
- The management and reporting rules, including the organization of meetings.
- The project’s reporting process
- The risk mitigation strategies
- The Deliverables and Milestones review process.
- Communication and dissemination guidelines
- Open Access to scientific publications
- The project management tools, including the communication tools, the documentation management tools (i.e., web based shared document repository), the reporting tools and the rules for using them.

### 3 Introduction and scope

KDT JU EdgeAI is a large and complex industry-driven research and innovation project requiring adequate management and quality assurance structures. The key characteristics of the KDT JU EdgeAI project are:

- Starting date: 01 December 2022
- Duration: 37 months
- Beneficiaries: 42
- Affiliated entities: 5
- Associated partners: 2
- Total resources: 3707 PMs
- Total budget: 35,43 M€
- Total EU funding (€ 10 171 160,41) (KDT JU approved € 10 171 167)

KDT JU EdgeAI project is a key initiative for the European digital transition towards intelligent processing solutions at the edge. The vision, mission, and goals of KDT JU EdgeAI in relation to the industrial areas and technological trends are shown in Figure 3.1.



**Figure 3.1 KDT JU EdgeAI project key conceptual elements**

KDT JU EdgeAI develop new electronic components and systems, processing architectures, connectivity, software, algorithms, and middleware through the combination of microelectronics, AI, embedded systems, and edge computing. It will demonstrate the applicability of the developed edge AI hardware/software/algorithms approaches across various vertical solutions, considering security, trust, and energy efficiency demands inherent in several use cases. The project covers the following key

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strategic application areas: Digital Industry, Energy, Agri-food and Beverage, Mobility, and Digital Society. These strategic areas will be covered through so-called Value Chains (VC).

Each value chain comprises of a set of demonstrators that provide the integration of the technologies developed by the project and are validated and tested in the industrial sector covered by the value chain. On demonstrator level the partners are working on different AI aspects related to the AI technology stack and their industry requirements.

The KDT JU EdgeAI project accelerates the edge AI-based digitisation of design, manufacturing, and business processes with edge AI integration throughout the complete edge continuum by implementing the edge AI technology developed in the VCs. By harmonizing the development schedules of each VC through the work packages the findings within each value chain are shared within the consortium, fostering knowledge exchange.

The KDT JU EdgeAI technology developments are aligned with several key strategic technology trends including *autonomic systems, hyperautomation, AI engineering, generative AI, cybersecurity, and meshed connectivity*.

### 3.1 Purpose and target group

The KDT JU EdgeAI project is based on a “Grant Agreement” (GA), signed by the KDT JU on behalf of the EC and the Coordinating Organization (SINTEF AS, Norway). Each beneficiaries signed the accession form, which is attached to the Annex of the Grant Agreement. In addition to the GA, a “Consortium Agreement” (CA) will be signed between the coordinating organization (SINTEF AS, Norway) and each beneficiary and associated partners. The CA covers aspects required to manage the consortium and implement the project. Finally, eligible beneficiaries signed a “National Grant Agreement” (NGA) that defines the agreements between the national funding authority and the partner, with respect to national regulations for funding.

This legal framework is complemented by a “Project Handbook and Quality Assurance” (PHQA) for the KDT JU EdgeAI project, in written form Deliverable 8.1. The PHQA describes the project overall management processes, rules, and tools to be applied throughout the KDT JU EdgeAI project. This document target group is the KDT JU EdgeAI Consortium in charge of the activities and the contracts’ fulfilment.

### 3.2 Contribution of partners

**Table 3.1: Partner contribution**

Chapter	Partner	Contribution
All	SINTEF	SINTEF is responsible for the preparation of D8.1

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### 3.3 Relation to other activities in the project

This document is part of the WP8 deliverables and describes the overall management and operational procedure to be followed in all KDT JU EdgeAI project work package activities.

## 4 GA – Article 7 Beneficiaries

The articles of the GA that the Consortium has signed serve as reference for the content of this Deliverable. The GA legal framework is complemented by “Project Handbook and Quality Assurance” (PHQA) for the **KDT JU EdgeAI** project.

### 4.1 Beneficiaries

The beneficiaries, as signatories of the GA, are fully responsible towards the granting authority for implementing it and for complying with all its obligations. They must implement the GA to their best abilities, in good faith and in accordance with all the obligations and terms and conditions it sets out. They must have the appropriate resources to implement the action and implement the action under their own responsibility and in accordance with Article 11. If they rely on affiliated entities or other participants (see Articles 8 and 9), they retain sole responsibility towards the granting authority and the other beneficiaries.

They are jointly responsible for the *technical* implementation of the action. If one of the beneficiaries fails to implement their part of the action, the other beneficiaries must ensure that this part is implemented by someone else (without being entitled to an increase of the maximum grant amount and subject to an amendment; see Article 39). The *financial* responsibility of each beneficiary in case of recoveries is governed by Article 22.

### 4.2 Internal roles and responsibilities

Each beneficiary must:

- keep information stored in the Portal Participant Register up to date (see Article 19)
- inform the granting authority (and the other beneficiaries) immediately of any events or circumstances likely to affect significantly or delay the implementation of the action (see Article 19)
- submit to the coordinator in good time:
  - the prefinancing guarantees (if required; see Article 23)

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- the financial statements and certificates on the financial statements (CFS) (if required; see Articles 21 and 24.2 and Data Sheet, Point 4.3)
  - the contribution to the deliverables and technical reports (see Article 21)
  - any other documents or information required by the granting authority under the GA.
- submit via the Portal data and information related to the participation of their affiliated entities.

The coordinator must:

- monitor that the action is implemented properly (see Article 11)
- act as the intermediary for all communications between the consortium and the granting authority, unless the GA or granting authority specifies otherwise, and in particular:
  - submit the prefinancing guarantees to the granting authority (if any)
  - request and review any documents or information required and verify their quality and completeness before passing them on to the granting authority.
  - submit the deliverables and reports to the granting authority.
  - inform the granting authority about the payments made to the other beneficiaries (report on the distribution of payments; if required, see Articles 22 and 32)
- distribute the payments received from the granting authority to the other beneficiaries without unjustified delay (see Article 22).

The coordinator may not delegate or subcontract the above-mentioned tasks to any other beneficiary or third party (including affiliated entities).

### 4.3 EdgeAI internal arrangements

The EdgeAI beneficiaries and the associated partners are negotiating the internal arrangements regarding the operation and coordination to ensure that the action is implemented properly into a written **CA** between the beneficiaries, associated partners, covering:

- the internal organisation of the consortium
- different distribution keys for the payments and financial responsibilities in case of recoveries
- additional rules on rights and obligations related to background and results.
- settlement of internal disputes
- liability, indemnification, and confidentiality arrangements between the beneficiaries.

The CA do not contain any provision contrary to the GA.

## 5 Project organisation and quality assurance

The organisational structure of the KDT JU EdgeAI consortium comprises the following consortium bodies as described in the CA:

- The General Assembly as the ultimate decision-making body of the consortium.
- The Project Management Board (PMB) as the overall responsible body to ensure progress in the execution of the Project, which shall report to and be accountable to the General Assembly.
- The Coordinator as the legal entity acting as the intermediary between the parties and the Granting Authority. The Coordinator shall, in addition to its responsibilities as a party, perform the tasks assigned to it as described in the GA and the CA.

The general and specific operational procedures for all the KDT JU EdgeAI consortium bodies, including representation in meetings, preparation, and organisation of meetings, voting rules/rights and quorum are described in the CA.

### 5.1 General Assembly

The beneficiaries including the affiliated entities and the associated partners agree to abide by all decisions of the General Assembly. This does not prevent the Parties from exercising their veto rights, or from submitting a dispute to resolution in accordance with the provisions of settlement of disputes according to the provisions in the CA.

The General Assembly shall be free to act on its own initiative to formulate proposals and take decisions in accordance with the procedures set out in the CA. All proposals made by the PMB shall also be considered and decided upon by the General Assembly. The following decisions shall be taken by the General Assembly:

- Content, finances, and intellectual property rights
- Proposals for changes to Annexes 1 and 2 of the GA to be agreed by the Granting Authority
- Changes to the Consortium Plan
- Modifications or withdrawal of Background in Attachment 1 of CA
- Additions to Attachment 3 of CA

Due to the complexity of the EdgeAI project and the technical topics addressed by 49 consortium beneficiaries, affiliated entities, associated partners coming from eleven different countries working in different activity groups through several work packages, a

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matrix functional organization (combining the activities in the value chains (VCs) and work packages) is setup to favour close cooperation between partners and to make local decisions simpler, with an efficient decision-making process.

A value chain is centred on research, innovation, and demonstrators by clustering the activities on tangible outputs to evaluate and test the technology developed in an industrial sector cover by the VC. The demonstrators are aligned with the VCs and project objectives. The AI-based technology is developed in accordance with the WP objectives and derived from the overall project goals.

The value chains group together partners or specific groups from the partners around well-defined technical activities that will result into at least one demonstrator/prototype. The links, starting from system specifications up to the subsystem, electronic module design, AI algorithms, and middleware and back to the integration of HW/SW modules, AI algorithms into subsystems/systems up to the final demonstrator/prototype.

The matrix structure presented in Figure 5.1 uses an integrated and collaborative approach where WPs represent the research, innovation domains with a focus on technologies, architectures, methodologies, tools, and frameworks, while the VCs represent experimental work and implementation efforts leading to the integration of the subsystems and their verification, validation, and testing.

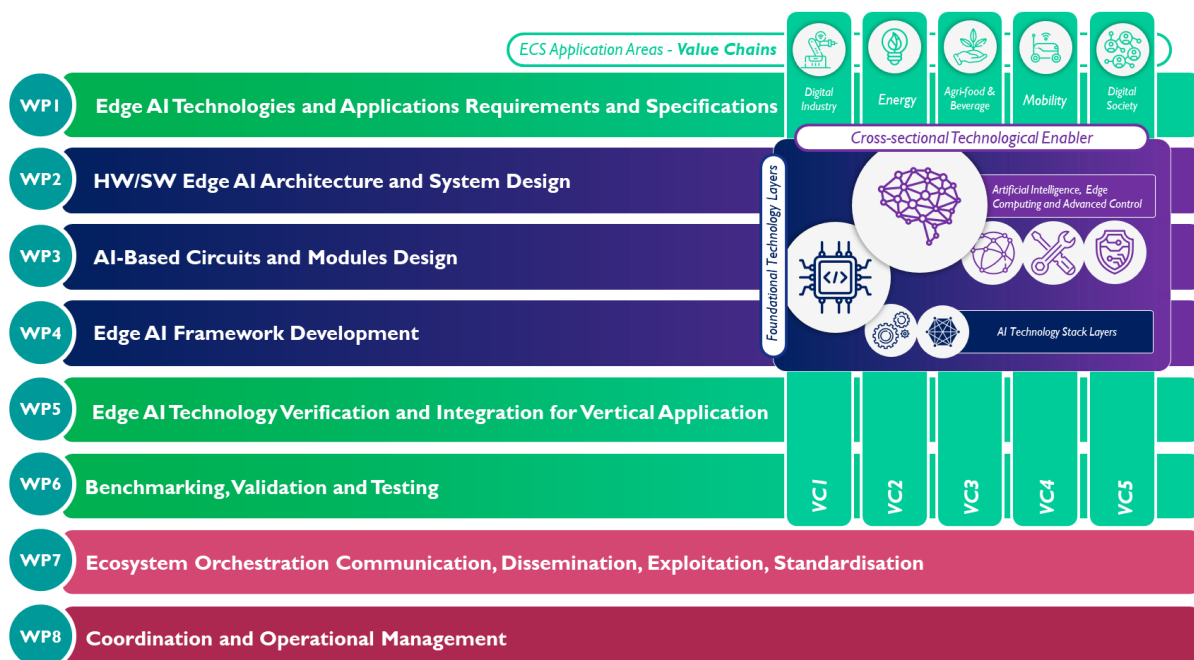


Figure 5.1 KDT JU EdgeAI matrix structure

## 5.2 Project Management Board

The PMB consists of the Coordinator, Work Package Leaders and the Value Chains Leaders as described in the description of action. The Coordinator chairs all meetings of the PMB, unless decided otherwise as specified in the CA.

The PMB team will keep track on potential risks, their potential impact and permanently seeks for mitigation. Certain risks and their potential impact can be identified upfront, and appropriate mitigation strategies can be defined.

Each consortium body shall not deliberate and decide validly in meetings unless two-thirds (2/3) of its members are present or represented (quorum).

## 5.3 Coordinator

The Coordinator is the intermediary between the consortium beneficiaries, affiliated entities, associated partners, and the Granting Authority and performs all tasks assigned to it as described in the GA and in the CA. In addition to the general tasks presented in the GA the Coordinator is responsible for:

- communication between the consortium and external parties, including EC and KDT JU.
- monitoring compliance by the consortium members with their obligations under this CA and the GA
- keeping the address list of KDT JU EdgeAI consortium members and other contact persons updated and available.
- collecting, reviewing to verify consistency, and submitting reports, other deliverables (including financial statements and related certifications) and specific requested documents to the Granting Authority
- transmitting documents and information connected with the KDT JU EdgeAI project to any other parties concerned.
- administering the financial contribution of the Granting Authority and fulfilling the financial tasks described in the GA and CA.
- promptly providing, upon request, the consortium parties with official copies or originals of documents that are in the sole possession of the Coordinator when such copies or originals are necessary for the parties to present claims or for other justified reasons (e.g., audits).
- providing a copy of the GA and its Annexes to the associated partners.

If one or more of the consortium beneficiaries, affiliated entities, associated partners is late in submission of any KDT JU EdgeAI project deliverable, the Coordinator may

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nevertheless submit the other parties' project deliverables and all other documents required by the GA to the Granting Authority in time.

#### **5.4 Work Package Leaders (WPL)**

The WPLs are responsible for smooth execution of the tasks assigned in their work package (WP). They closely work together with the beneficiaries, affiliated entities, and associated partners in making technical decisions. They report to the PMB and to the Coordinator. They monitor the progress of the WP and chair, plan, organize and execute WP meetings, enforce timely provision of deliverables, and organize the review of the deliverable documents in time and in cooperation with the task leaders and Coordinator. They hand over completed and ready to deliver documents to the Coordinator for delivery. They maintain the document repository for their share of work. They keep in contact with the value chain leaders and value chain demonstrator leaders to guarantee proper execution of the developments planned in their WP.

#### **5.5 Task Leader (TL)**

Work packages are organised into several tasks. Each task has a task leader responsible for managing the day-to-day work within the task. He/she is responsible for communicating all necessary information within the task and to other TL wherever necessary. In case of conflicts or problems he/she cannot solve on his own or within the task, the TL is responsible for escalating the topic to the WPL and or VCL related.

#### **5.6 Value Chain Leader (VCL)**

The VCL is responsible for the overall result of the work described in the value chain assigned. The VCL needs to monitor the work in the different WPs w.r.t. the value chain result planned. The VCL must closely work together with the WPLs conducting design work on behalf of the value chain and shall ensure that the result retrieved matches the overall targeted result of the value chain. The VCLs complement the WPLs and are also members of the PMB.

#### **5.7 Value Chain Demonstrator Leader (VCDL)**

The VCDL is responsible for the results of the work described in the value chain demonstrator assigned. The VCDL needs to monitor the work in the different WPs w.r.t. the value chain demonstrator results planned. The VCDL must closely work together with the VCL leading the respective value chain and shall ensure that the result retrieved matches the overall targeted result of the value chain demonstrator.

## 6 Management procedures and reporting

Projects of the size of KDT JU EdgeAI require clear regulations for reporting, decision making rules and professional delegation methods and procedures. This concerns technical and administrative matters.

### 6.1 Reporting

Reporting follows the flow upwards from lowest levels up to the highest levels. The responsible partner at a specific level decides whether involvement of the next level is needed or not.

Hierarchy in WP structure (from lower to higher levels):

- Persons conducting task work report to the TL.
- TL reports to the WPL and Coordinator
- WPL and VCL reports to PMB and Coordinator
- VCDL reports to VCL and Coordinator
- The Coordinator informs/involves the General Assembly

The hierarchy in the VC structure is principally the same except there are no tasks in VCs and thus there is one level less in reporting. Thus, the persons working on a work part of the VC report to the VCL and Coordinator who reports to the PMB/ Coordinator.

### 6.2 Decision Making and Procedures

Decision making will be done on the following four levels:

- L5: At WP or VC level decision will be taken by the person working at a specific task, potentially discussing this at the same level with colleagues inside or outside the own organization in case this does not result in a satisfactory solution or needs escalation, the person will in-form/involve the next decision-making level.
- L4: The next decision-making level is the Task level managed by the TL. The TL will endeavour to resolve the conflict/problem in cooperation with the persons involved within the task. In case this is not successful, the TL will involve the next decision-making level.
- L3: The next decision-making level is the WPL/VCL to be informed for support in finding a resolution of the problem. The WPL/VCL may also involve other WP/VC in finding a solution. In case this does not lead to a satisfactory solution or needs escalation, the WPL/VCL will in-form/involve the next decision level.

- L2: The next decision-making level is to inform the Coordinator and potentially bring it up for resolution in the PMB. The Coordinator may decide to either solve it by his consultancy and by involving the STC. In case the Coordinator decides to involve the PMB, the Coordinator may call in a PMB meeting either per telephone/online or as a face-to-face meeting. For this purpose, the Coordinator may invite non PMB persons related to the problem to participate in the PMB meeting to solve the problem efficiently. In case this does not work out the Coordinator and the PMB can escalate it to the highest level for decision making.
- L1: the highest decision-making level is the Coordinator bringing the issue up in the General Assembly and call in a General Assembly meeting either conducted via face-to-face meeting or via telephone/online conference/Web meeting.

Decision making procedures foresee the following:

- Prior to seeking decisions, the person in charge needs to clearly define the problem/issue including options/alternatives available in written form (generally within the agenda of decision meeting).
- The person in charge invites the involved parties to a meeting (telephone- or Web-based or face to face).
- The options/alternatives are discussed among the participants who can also suggest other options. In case a decision can be made, the decision needs to be documented in the minutes of meeting which will be distributed to the participants and minimum the next management level. Generally, all minutes will be saved at the project collaborative web-space (KDT JU EdgeAI Box repository) and shall be visible to all participants with exception of the Coordinator deciding differently.
- In case no decision could be made the issue is escalated to the next decision level and documented in the same way.

### 6.3 Risk Management Procedures

The risk management is an on-going process to monitor, identify and manage threats that might affect the project's results. The KDT JU EdgeAI risk's assessment is part of the management activities that are described in deliverable D8.2 – Risk Management Plan.

KDT JU EdgeAI project risk mitigation measures are continuously evaluated, and the potential risks are identified early in the project, to assess the risks and take action to mitigate and recover. High- impact/-probability risks are under special supervision by the PMB. The overall operational management approach implements processes for identifying and resolving project risks, which follow established best practices of project management.

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The risk management plan will comprise a key element of the project guidelines. A second output of the risk management planning is expected to be the risk register template, that based on a risk identification process collects the actual risks that the project is exposed to.

The output of the risk identification process is a complete risk register. The risk identification involves all WPs and VCs and is typically carried out as a sequence of moderated project workshops. The risk analysis at the management level is monitored continuously during the project lifetime. The updated risk analysis at management level will be first included in D8.2 (m05).

Suitable alternative metrics are identified (delay of deliverables or milestones, evaluate the need for additional human resources, % loss in performance, etc.). Having characterised and quantified all project risks identifiable with reasonable effort, suitable plans are devised for how to deal with the different risks during the risk response planning. This can involve various proactive mitigation measures (try to reduce the probability of occurrence of a given risk) or reactive mitigation measures (try to reduce the impact of a given risk). After all risks are identified, sufficiently characterised, and quantified, the risk mitigation measures are defined and implemented. All project risks are continuously monitored and managed during in the VCs and WPs activities.

## 6.4 Reporting Calendar

Deliverables and milestones must be prepared and submitted as defined in Annex 1 to the GA. To ensure timely submission of the reports, the partners must respect the deadlines decided in the GA.

Deliverables and milestones must be prepared by the responsible project partner as defined in Annex 1 to the GA, in accordance with the timing and conditions set out in it. The completed deliverables and milestones are sent to the Coordinator who is responsible for the submission (or defined supporting person) after the deliverable was checked and approved by the TL and WPL.

The intermediate and the periodic project reports must be submitted as scheduled in the GA. In these reports the technical project progress is described. The financial reporting to KDT JU for the periodic report is done via the Participant Portal.

For both intermediate and the periodic reports, the project partners should report PMs data to the coordinator for a better project tracking (template is provided by the coordinator).



All consortium partners who have performed tasks in the specific reporting period will be asked to report their work progress. WP/Task Leaders and VC Leaders oversee the summary of the related parts.

## 6.5 Tracking progress

Progress and the use of resources in all work packages will be monitored by the WPLs. At task level, the TLs will take care of it. At work package level, the relevant activities will be subjected to the monitoring through the WP leaders.

The scheduling of deliverables as described in the GA and the milestones allow for continuous monitoring the project evolution, measuring the progress made through qualitative and quantitative evaluations, defining priorities, and optimising the KDT JU EdgeAI project progress by corrective measures.

Activities in KDT JU EdgeAI project are synchronised over a period of three years by the milestones defined in the GA. With each milestone, the different work package teams with their tasks and partners will deliver individual results according to descriptions, rules, and roadmaps.

The Coordinator regularly updates the project dashboard to track the project progress (GANTT chart and actual vs. planned deliverable availability) and resource use (Excel file comparing planned and actual person months spent).

The project progress is tracked at least on a half-yearly basis. Along with the progress and resource utilisation, monitoring comprises also financial information. Tracking resource and budget data is done on a yearly basis (in preparation of the review meetings).

As to the overall project, the PMB, which is chaired by the Project Coordinator, assesses the project progress and advice on corrections or modifications in the project work. If necessary, it will suggest actions that should be considered by the General Assembly.

The overall quality assurance and quality management of the KDT JU EdgeAI project is closed loop control, where a continuous project management performs actions to drive the project activities towards the desired objectives and impacts.

The project monitoring acts as a feedback channel, ensuring that deviations of the results from the intended objectives are detected in time to enable the project management to perform corrective actions, if required.

The main drivers of the control process are the legal and contractual documents (at EC, KDT JU and national levels) that define both the required outputs (demonstrators, research results, deliverables, reports, etc.) and the conditions and resources of the work.

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## 7 Project Data Storage and Documents Management

### 7.1 Online project repository

The Coordinator provides a Box cloud-based platform for data exchange and online project repository, where the sharing of files is possible among KDT JU EdgeAI consortium's partners and for review meetings with the project officer (PO) and assigned experts/reviewers. The cloud-based platform is the "Box" installed on a European-based server. The files are shared within the KDT JU EdgeAI consortium. There are no restrictions for the upload/download speed of the connected users. Within the Box, version control allows access to older file versions. The Box platform is updated frequently to keep the system up-to-date. A backup is made from all data physically separated from the server. Access to the files is only allowed through the HTTP protocol. After the login to the Box, all communication is protected through an SSL encrypted access, verified by a CA-certificate.

### 7.2 Quality assurance bottom-up approach.

Quality assurance in KDT JU EdgeAI project follows a bottom-up process:

- Quality assurance of any deliverable reports by means of the project internal review process coordinated by WPLs.
- Regular monitoring of the progress of each individual task of each work package in the WP meetings (almost every three months).
- A summary of the achieved results.
- A self-assessment (traffic light) of the status in each task compared to the plan (see GANTT charts in WP descriptions, Technical Annex - TA/Description of Action - DoW).
- Green: all objectives can be achieved; delay of maximum one month compared to the plan; no fallback solutions required.
- Yellow: all objectives can still be achieved; delay between 1-3 months compared with the plan; minor changes required and fallback solutions in place.
- Red: major changes required or delay larger than 3 months compared to the plan
- WP meeting minutes shall summarize the status of the work package including the individual tasks.
- Regular monitoring of the KDT JU EdgeAI project progress as a whole by means of the intermediate progress reports and the periodic progress report.
- Regular monitoring of the project status within the frame of the General Assembly meetings.

- Regular monitoring of the project progress (including all deliverables due in a reporting period) and the resources used within the technical reviews organized by KDT JU.

## 8 Conclusion

The deliverable D8.1 "Project Handbook and Quality Assurance" - PHQA is produced within Work Package 8 (Coordination and Operational Management) of the KDT JU EdgeAI project under Task 8.1 - Project Coordination and defines the overall management procedures, organisational structure, rules, and tools to be applied throughout the KDT JU EdgeAI Project lifetime. It complements the legal and contractual documents, i.e., the GA, the National Grant Agreements (NGA) and the CA employing practical project management and quality assurance.

The document aims to inform the KDT JU EdgeAI beneficiaries, affiliated entities and associated partners concerning the project organisation and to guide day-to-day actions.

The PHQA is a "living document", so it is intended to be adapted and updated this document during the project duration if needed and aligned to eventual GA amendments.

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