

Project Reporting in eMS – Lead Partners

This document is a complement to the Partner Reporting instructions, which should be read first for a full understanding of the Project Reporting module.

eMS is a programme monitoring system with a communication portal, which will allow programmes to collect and store all necessary project and programme information and communicate with beneficiaries electronically via a secure online communication portal. INTERACT has developed this software for the benefit of all ETC programmes.

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1. Project Reporting Cycle

To ensure a good monitoring of the project implementation, NPA projects are expected to submit a Project Report on a 6-monthly basis. Reporting periods are individual per project, and depend on the project's start date. A Project Report contains both activity and financial information.

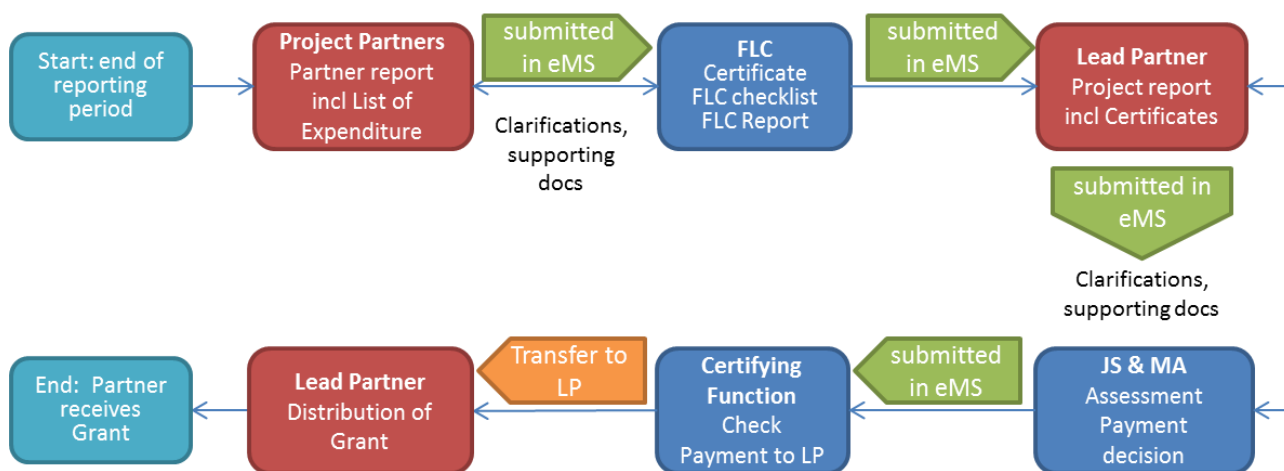
There are two types of reports a project has to complete:

- **Partner Report:** this report is filled out by each partner, including the Lead Partner. It contains both activity information and financial information. The partner report is submitted by each partner to their First Level Controller in eMS.
- **Project Report:** this report is filled out by the Lead Partner. It contains both activity information, and financial information based on the First Level Control certificates from the partners. The project report is submitted by the Lead Partner to the Programme in eMS.

Projects have **3 months** from the end of the reporting period, until they submit their Project Report to the Programme. Inside this period, First Level Controllers have 2 months to carry out their work.

Once submitted, the Project Report enters a process of assessment by the Joint Secretariat, the Managing Authority, and the Certifying Function. For Project Reports that are complete, the assessment period takes maximum 90 days. If the Project Report is accepted, the payment is made to the Lead Partner, after which the Grant is distributed to the project partners. If any information is missing, the programme bodies will ask the project for clarifications.

Figure 1 - Project reporting cycle



2. Project Report

After the Partner Reports are visible to the Lead Partner, they can start to compile the Project Report.

Creating a Project Report

To create a Project Report, log in to eMS and select your project. As an approved project, you are normally automatically led to the reporting section. If you are in the application-mode of your project, you can find the reporting section in the left-hand menu under Management.

The Lead Partner needs to switch to the role of “Lp” in order to have access to and create a Project Report. To create a new report, click on “Create Report for” and select the relevant period.

Figure 2 - Report section

The screenshot shows the eMSdemo web application interface. The top navigation bar includes the Interreg EMSdemo logo, a user profile section with 'DA 2' and 'Show More', and a 'Reports' tab. The left sidebar contains navigation links: Project Living Tables, Project, Supplementary Information, Exit, Help, Contacts, and Logout. The main content area is titled 'Project Reports' and features a table with columns: Report, Report Start, Report End, State, Date Of Project Submission, Total Expenditures, and View Report. The table lists six periods from 01.05.2015 to 30.04.2018. Below this table, there is a 'Create Report For' button set to 'Period 1' for the date range '01.05.2015 - 31.10.2015'. A red arrow points to this button. Below the button, the 'Partner Reports' section for '1 - Causeway Coast and Glens Heritage Trust - ccgth' is displayed, showing a table with columns: Report, Report Start, Report End, State, Date Of Partner Submission, Included In Project Report, Total Partner Expenditure Declared ERDF, View Report, and Certificate. This table also lists six periods from 2015 to 2018.

Workflow Project Report

The Project Report consists of questions about the project’s activities, and delivery of the main outputs. It is also the place where the Lead Partner can choose which certificates to include. The second part of the Project Report contains the reporting per Work Package. The third part contains the certificates for the individual project partners. It is here that the Lead Partner can make deductions, if needed. The fourth part, Project report tables, gives a summary of the financial information, in other words the project claim. The final part is the Attachments, where partners upload relevant supporting materials. After completing the Project Report, the first tab will give a summary.

Figure 3 - Workflow Project Report



2.1 Tab: Report

Question	Instructions
Period x (autofilled dates)	
Period x start date	Fill in the start date of the period covered in this report.
Period x end date	Fill in the end date of the period covered in this report.
<p>Please describe project progress up to now, including project objectives reached and main outputs delivered, highlighting the added value of the cooperation.</p> <ul style="list-style-type: none"> The summary should highlight main achievements, positive impacts, interesting and understandable for non-specialists. If applicable, please report on any collaboration with other EU funded projects during this period. Please write in a style of press release. 	<p>We are looking for a concise description of the project's progress in terms of the activities, outputs and deliverables delivered in this reporting period, and the results overall.</p> <p>The description should be coherent with the activities and expenses listed in other parts of this Project Report.</p> <p>Please highlight any main achievements, and collaboration with other programmes. We would like to capture positive impacts of your work, tangible or intangible, anticipated or unexpected.</p>
List of Partner FLC Certificates	
Include In Project Finance Report	<p>Tick those FLC Certificates (certified partner finance reports) that should be included in the project claim.</p> <p>If deemed necessary, the Lead Partner can decide not to include a FLC certificate (partner finance report) in the project claim. It is also possible to correct individual expenses on the tab "Certificates".</p>
Project Objectives (1,2,3)	
<p>What is the progress towards the project objectives as defined in the application form? The information provided should be cumulative.</p>	<p>Select from:</p> <ul style="list-style-type: none"> Fully achieved To a large degree To a minor degree Not achieved
Please explain the level of achievement of the project objective.	Please elaborate on your choice above.
Project Main Outputs Achievement	
Sum of achieved output indicators so far	Autofilled from earlier reports
Achieved So far	Autofilled from underlying work packages
Target Groups Reached	
<p>Number of new individual cases of the target group reached by the project in this period</p> <p>Please describe the source of the data</p>	<p>We are looking for the number reached by the project on aggregated level. Please give whole numbers only.</p>
Please describe how the target group was involved during this period and in what context. Please also describe if any previously underrepresented groups (e.g. young persons, women, or indigenous peoples) have been directly involved.	We would like to capture how the target group was involved in the project activities during this period, and if underrepresented groups were reached.

Question	Instructions
Problems and Solutions Found	
<p>Please describe (if applicable) problems and solutions found during this reporting period as regards:</p> <ul style="list-style-type: none"> Objectives, outputs, results (project feasibility, critical path, stakeholder engagement, viability of outputs, dissemination); Partnership development, and cooperation dynamics; Budget (spending level, eligibility issues, State Aid); Other. <p>Please assess for the points above the potential risks for a successful project implementation (low/medium/high) and how you will mitigate these risks. Do you foresee any difficulties with achieving the results, or for the relevance of the results?</p>	<p>We would like to get an insight into any problems and deviations affecting the project work during this period, and how you handled this as a partnership. This gives us an idea how the project is faring, and if there is the programme bodies can do anything to help the situation.</p> <p>In addition, we would like to capture how the project's risk profile is developing since the inception paper.</p>
Horizontal Principles	
Please describe any measures taken to address the 3 horizontal principles during this reporting period	
Contribution in this period	<p>Select from:</p> <ul style="list-style-type: none"> As planned Additional positive impacts Less than planned
Please report on concrete steps and activities your project took during this reporting period to address the horizontal principle. Please also describe the impact of the measure(s) taken.	Please elaborate on your choice above, and provide concrete examples.

2.2 Tab: Work Packages

Select the relevant work package from the drop-down menu.

Question	Instructions
Work Package type M Management	
Work Package Status	<p>Select from:</p> <ul style="list-style-type: none"> Not started Completed Proceeding according to work plan Behind schedule Ahead of schedule
Please describe the progress in this reporting period and explain how partners were involved and who did what	We are trying to get an insight into the partnership dynamics and the division of roles.
Please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solutions found	We would like to get an insight into any problems and deviations affecting your work during this period, and how your partnership handled this. This gives us an idea how the project is faring, and if there is the programme bodies can do anything to help the situation.

Please describe progress achieved in this reporting period	
Activity Status	Select from: <ul style="list-style-type: none"> • Not started • Completed • Proceeding according to work plan • Behind schedule • Ahead of schedule
Work Package type Communication	
Work Package Status	Select from: <ul style="list-style-type: none"> • Not started • Completed • Proceeding according to work plan • Behind schedule • Ahead of schedule
Please describe the progress in this reporting period and explain how partners were involved and who did what	We are trying to get an insight into the partnership dynamics and the division of roles.
Please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solutions found	We would like to get an insight into any problems and deviations affecting your work during this period, and how your partnership handled this. This gives us an idea how the project is faring, and if there is the programme bodies can do anything to help the situation.
Communication objectives: what is the progress toward the communication objectives as defined in the application form? The level of achievement should be cumulative. However, the explanation should describe achievements in this reporting period.	
Description (prefilled)	Pre-filled from application (If this is empty, contact your JS desk officer to update this)
Level Of Achievement	Select from: <ul style="list-style-type: none"> • Fully achieved • To a large degree • To a minor degree • Not achieved
Please explain the level of achievement of the communication objective	Please elaborate on your choice above, and give concrete examples.
Please describe progress achieved in this reporting period	
Activity Status	Select from: <ul style="list-style-type: none"> • Not started • Completed • Proceeding according to work plan • Behind schedule • Ahead of schedule
Deliverable Status	Select from: <ul style="list-style-type: none"> • Not started • Completed • Proceeding according to work plan • Behind schedule • Ahead of schedule
Please attach any evidence of the deliverable, e.g. Reports, pictures, articles, etc.	Please click on "upload" to attach the relevant file(s).

Work Package type Implementation (T1, T2,...)	
Work Package Status	Select from: <ul style="list-style-type: none"> • Not started • Completed • Proceeding according to work plan • Behind schedule • Ahead of schedule
Please describe the progress in this reporting period and explain how partners were involved and who did what	We are trying to get an insight into the partnership dynamics and the division of roles.
Please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solutions found	We would like to get an insight into any problems and deviations affecting your work during this period, and how your partnership handled this. This gives us an idea how the project is faring, and if there is the programme bodies can do anything to help the situation.
Project Main Outputs	
Achievement in this report towards the output indicator	Please indicate the contribution to the output indicator for the selected output during this reporting period. Please only include completed/delivered outputs in your number.
Level of achievement (cumulative for the entire project including current period)	Select from: <ul style="list-style-type: none"> • Not started • Completed • Proceeding according to work plan • Behind schedule • Ahead of schedule
Please attach any evidence of the delivery of the output, e.g. Pictures, flyers, articles, etc.	Please click on "upload" to attach the relevant file(s).
Please describe progress achieved in this reporting period	
Activity Status	Select from: <ul style="list-style-type: none"> • Not started • Completed • Proceeding according to work plan • Behind schedule • Ahead of schedule
Deliverable Status	Select from: <ul style="list-style-type: none"> • Not started • Completed • Proceeding according to work plan • Behind schedule • Ahead of schedule
Please attach any evidence of the deliverable, e.g. Reports, pictures, articles, etc.	Please click on "upload" to attach the relevant file(s).

2.3 Tab: Certificates

In this section, you can enter the list of expenditure for each individual partner finance report as certified by the First Level Controller. Select the relevant certificate from the drop-down list.

Lead Partners are expected to be the “policemen” in the partnership, ensuring that all costs can be connected to eligible/approved project activities. The LP has the also right to make deductions, if a partner’s expense is not in line with agreed project activities. Such deductions can be made by going into an individual expense, and entering an amount in the field “Difference LP”. An explanation can be put in the comment box, which will be visible to the Joint Secretariat and Managing Authority. Then click Save.

In addition, the Lead Partner can decide not to include an entire FLC certificate (partner finance report) in the project claim. The inclusion of FLC certificates is handled on the first tab “Report”.

Figure 4 - Review expenditure - LP view

The screenshot displays the eMS web application interface for reviewing expenditure. The main header shows 'TestProj7 72' and 'Partner LP_IS - Project Report 1 - Period 1'. The left sidebar contains navigation options: SAVE, Exit, Help, and Logout. The central area features a 'List Of Expenditure' table with columns for Seq No, Budget Line, and Description. A modal window is open for editing a specific expenditure item, showing fields for Date Of Payment, Currency, Total Value, VAT, Declared Amount, and various difference and certified amount fields for FLC and LP. The background table shows a list of expenditure items with columns for Seq No, Budget Line, and Description.

Seq No	Budget Line	Description
1	Staff costs	
1	Office and administrative	
1	Travel and accommodation	

Modal window details:

- Date Of Payment: 01.12.2015
- Currency: ISK - Icelandic króna
- Total Value Of Item In Original Currency: 3.500.000,00
- Vat: 0,00
- Declared Amount In The Original Currency: 3.500.000,00
- Expenditure Outside (The Union Part Of) The Programme Area? ☐
- In Kind ☐
- Verified By FLC ☒
- Difference FLC: € 0,00
- Amount Certified FLC: € 24.872,09
- Difference LP: € 0,00
- Amount Certified LP: € 24.872,09

2.4 Tab: Project Report Tables

This tab provides an aggregated overview of the project claim per budget line, work package and funding source. In case of already submitted claims, this tab will also indicate previously reported costs. At the bottom of the page, you can see the Project Expenditure Spending Profile.

It is possible to export each table to Excel.

Figure 5 - Tab Project Report Tables

Report > Workpackages > Certificates > Project Report Tables > Attachments

Project Report Expenditure Summary

Programme Co-financing	Project Total Budget	Previously Reported(Certified By C A)	Currently Reported	Total Reported	%of Total Budget	Remaining Budget	Total Amount Declared By Partners	Total Amount Certified By Flc	Total Amount Included in Project Finance Report	Total Amount Approved By Js	Total Amount Approved By Ma
Total Co-financing	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0,00 %	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00
Partner Contribution	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0,00 %	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00
Total Eligible Expenditure	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0,00 %	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00

Export

Project Expenditure Per Budgetline

Budgetline	Project Total Budget	Previously Reported(Certified By C A)	Currently Reported	Total Reported	%of Total Budget	Remaining Budget	Total Amount Declared By Partners	Total Amount Certified By Flc	Total Amount Included in Project Finance Report	Total Amount Approved By Js	Total Amount Approved By Ma
Staff costs	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0,00 %	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00
Office and administration	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0,00 %	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00
Travel and accommodation	€ 0,00	€ 0,00	€ 0,00	€ 0,00	0,00 %	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00	€ 0,00
External											

2.5 Tab: Attachments

The following supporting documentation is expected to be submitted together with the Project Report:

- Examples of project communication measures, if not already linked to deliverables under the WP Communication.
- Lead Partner Signature Template - signed by legal representative for the Lead Partner organisation and scanned

Click on the + Upload button to add new attachments.

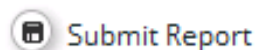
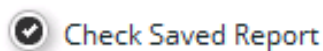
Note that evidence for outputs and deliverables should not be uploaded here, but in the relevant sections of the Project Report.

Please do not upload attachments bigger than 2 MB!

2.6 Submitting the Project Report

After finalising the Project Report, we recommend that you print it to PDF, under the menu item “Print Project Report”.

Before you are able to submit your Project Report, you will need to click on “Check Report”. Only after all checks are okay, you will be able to submit your application by pushing the “Submit Report” button. You will then be asked if you are sure.



Once submitted you are not able to make further changes to your report.

After submission, the Project Report becomes visible to the Joint Secretariat and the Managing Authority. The report will then enter the assessment procedure.

3. Help and Technical Support

For any technical problems you might experience with the eMS, please contact the Joint Secretariat at secretariat@interreg-npa.eu, or by telephone at +45 3283 3784 during office hours. Alternatively, you can make a support ticket on the eMS Helpdesk: <https://npaems.freshdesk.com/support/home>. This will be dealt with by a Joint Secretariat staff member.