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INTERREG ITALY–CROATIA PROGRAMME 2021–2027

Manual for reporting in Jems

1st Call for Proposals

(Version 1.0 – December 2023)

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This manual is intended to provide beneficiaries of projects approved under the 1st Call for Proposals of the Interreg VI A Italy-Croatia CBC Programme 2021-2027 with a practical and basic overview of the reporting procedures to be performed in Jems in the implementation phase. Therefore, the present document is structured in the following three parts: Partner Report, Control Report and Project Report. For a more detailed overview, please see the Application/project details section of the Jems User manual at <https://jems.scrollhelp.site/manual/v7/application-project-details>.

1. Partner Report

The “Partner reports” section appears in the “Project overview” menu when the project is set to status Contracted. Users with the **project privilege edit** for a dedicated partner organisation (**LP user** for a Lead Partner organisation, or **PP user** for a Project Partner organisation) are thus able to use this section to create, edit and submit Partner reports. For detailed information concerning the configuration, please refer to the “Project Privileges and Notifications” chapter in the *Manual for starting the project implementation in Jems*.

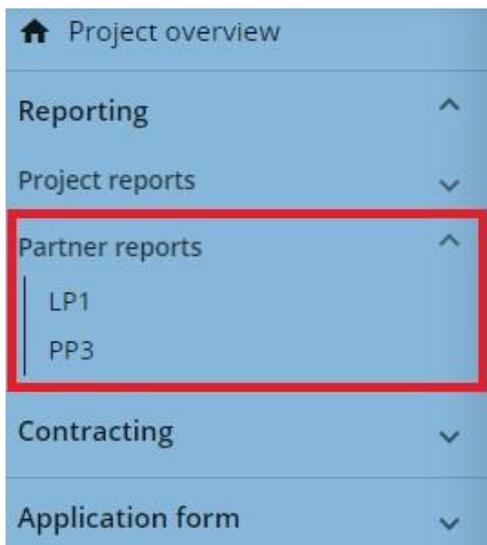


Image 1. Location of the “Partner reports” section in the “Project overview” menu

When an LP user or a PP user (in the following text: **partner user**) has the edit rights of his partner organisation within the project privileges overview, he can create Partner reports within his own dedicated section.

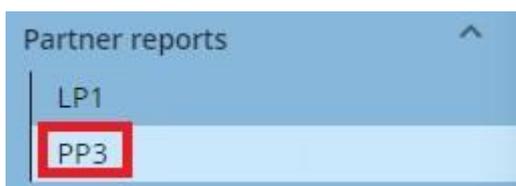


Image 2. “Partner reports” section for PP3



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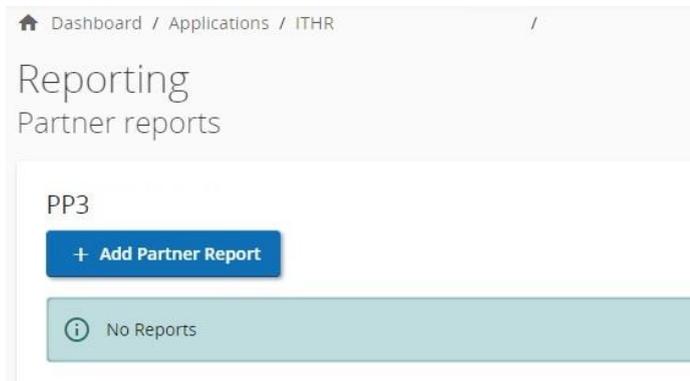


Image 3. “Partner reports” overview table for PP3

When the “+Add Partner Report” button is clicked the Partner Report is generated.

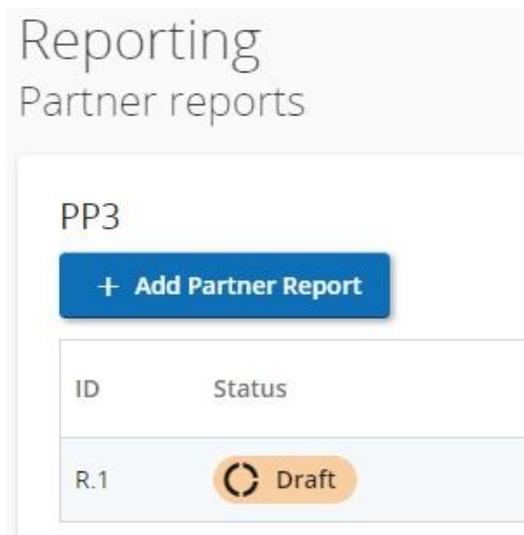


Image 4. When Partner Report is generated, it is in status Draft

Important to note is that the **data from the last approved application form version is taken into the Partner Report in the moment of its creation.** Ongoing modifications, such as budget change, will have no impact on the data in existing reports.

⚠ POINT OF ATTENTION:

- Partner users will only see the Partner reports of the partner organisation they are assigned to. In case a Lead Partner’s **Project manager (Application form user with the project privilege edit or manage)** wants to see the Partner reports of all project partners, he should be added with View rights to each partner organisation in Project privileges.



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When reports are created, they can be accessed via the overview table found in the same section, as shown below.

Reporting

Partner reports

LP1

[+ Add Partner Report](#)

ID	Status	Included in project...	AF version linked	Reporting period
R.3	 Draft		2.0	
R.2	 Control ongoing		2.0	Period 2, month 7 - 12
R.1	 Certified	PR.1	2.0	Period 1, month 1 - 6

Image 5. Partner reports overview table

Each Partner Report is divided into nine tabs:

1. Report identification,
2. Work plan progress,
3. Public procurements,
4. List of expenditures,
5. Contributions,
6. Report annexes,
7. Report export,
8. Financial overview, and
9. Submit.



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1.1. “Report identification” tab

When creating a report, partner user will land automatically on the first tab called “Report identification” in which the top table provides some basic data retrieved from the last approved Application Form. The partner user with edit rights must in this tab also link the Partner Report to a Reporting Period (coming from the Application Form) and indicate the Reporting start and end dates.

The screenshot shows the 'Report identification' tab with a table of partner progress report identification data. The table includes fields such as Project ID and acronym, Partner report ID, Partner report status, Partner number, Name of the organisation in original language, Name of the organisation in english, Legal status, Type of partner, Partner organisation can recover VAT for project activities, Co-financing source and rate, Country, Local currency (according to InforEuro), and AF Version linked. Below the table, there are input fields for Reporting period start date (MM/DD/YYYY), Reporting period end date (MM/DD/YYYY), and a Reporting period dropdown menu.

A.1 Partner progress report identification	
Project ID and acronym	ITHR
Partner report ID	R.1
Partner report status	🔄 Draft → ▶ Submitted → 🔍 Control ongoing
Partner number	PP3
Name of the organisation in original language	
Name of the organisation in english	
Legal status	Private for-profit
Type of partner	SME
Partner organisation can recover VAT for project activities	Yes
Co-financing source and rate	ERDF 80,00%
Country	Hrvatska (HR)
Local currency (according to InforEuro)	EUR
AF Version linked	2.0

Reporting period start date (MM/DD/YYYY)

Reporting period end date (MM/DD/YYYY)

Reporting period

Image 6. “Report identification” tab’s top table (part A.1)

The other fields and tables on this page include “Summary of partner’s work in reporting period”, “Partner problems and deviations”, “Partner spending profile” and “Target groups”. Data in tables comes from the last approved Application Form (such as Target groups listed and Period target budget). In the textbox “Partner problems and deviations”, partner users must list any deviation in their part of the project activities, such as any changes to the approved work plan, outputs, deliverables, etc.



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A.2 Summary of partner's work in reporting period

Please describe your progress in this reporting period and how this contributes to other partners' activities, outputs and deliverables delivered in this reporting period.

Enter text here

A.3 Partner problems and deviations

If applicable, please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solutions found.

Enter text here

Image 7. "Report identification" tab's additional information section (parts A.2 & A.3)

Partner spending profile

Partner number	Period target	Current report	Cumulative target	Total reported so far	Cumulative target - total report so far	Total report so far / cumulative target	Next report forecast
LP1	26.316,00	392,00	31.816,00	5.892,00	25.924,00	18,52%	0,00

If applicable, please explain any deviations in the spending profile compared to the amounts indicated in the Application form

Enter text here

Image 8. "Report identification" tab's additional information section (part A.4).

In the Partner spending profile section, the partner users must fill in an amount in the "Next report forecast" field, as well as explain in the text field below any eventual deviations in the spending profile compared to the amount indicated in the Application form.

Target groups

In the table below you will see a list of target group you indicated in the application form. Please explain which target groups you involved, in what way and to what extent.

Target Group	Description of the target group involvement
Regional public authority	Enter text here

Image 9. "Report identification" tab's additional information section (part A.5).



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1.2. “Work plan progress” tab

The second tab, “Work plan progress”, takes the work plan related data from the last approved application form, organised per work package.

Image 10. “Work plan progress” tab’s overview

A.5 Work plan progress

Activity Nr.	Activity title	Progress	Attachments								
A 1.1		Enter text here									
<table border="1"> <thead> <tr> <th>Deliverable nr.</th> <th>Deliverable title</th> <th>Contribution</th> <th>Attachments</th> </tr> </thead> <tbody> <tr> <td>D 1.1.1</td> <td></td> <td><input type="checkbox"/></td> <td></td> </tr> </tbody> </table>				Deliverable nr.	Deliverable title	Contribution	Attachments	D 1.1.1		<input type="checkbox"/>	
Deliverable nr.	Deliverable title	Contribution	Attachments								
D 1.1.1		<input type="checkbox"/>									
A 1.2		Enter text here									

Image 11. WP1 expanded view (Activities and Deliverables)

Output Nr.	Output title	Contribution	Attachments
O 1.1		<input type="checkbox"/>	

Image 12. WP1 expanded view (Outputs)



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In this tab, the partner users must describe their progress on work packages, objectives, investments, activities, deliverables, and outputs, while for deliverables and outputs also indicating if they contributed. (Later, at Project Report level the LP’s Project manager shall fill in the values achieved). Partner users can also upload an attachment per item which will show up again in “Report annexes” tab.

⚠️ POINT OF ATTENTION:

- In case multiple files should be uploaded per item, it is recommended to upload a zip or rar file. **The maximum file size per upload is 20 MB.**
- Each LP/PP opting for the 20% flat rate for Staff costs must provide evidence of the existence of the Staff costs category during the 1st Reporting Period by briefly describing the Staff involved in carrying out project activities under WP1 Progress and by enclosing one supporting document proving that at least one person has worked in the project (Self-declaration certifying that the employee/s of the beneficiary institution has/have worked in the project, accompanied by the related contract).
- Each LP/PP opting for the 15% flat rate for Travel and accommodation costs must provide evidence of the existence of the Travel and accommodation cost category at least once in the project’s lifetime by briefly describing the travels incurred in the concerned WP Progress and by enclosing one supporting document proving that at least one travel had taken place (e.g.: mission report; travel order).

1.3. “Public procurements” tab

The “Public procurements” tab has a “+ Add Procurement” button which opens the procurement for filling in details, and an overview list with details of the procurements already created.

Report identification Work plan progress **Public procurements** List of expenditures

Public procurements
The partner public procurements included in all previously created partner reports show up here.

+ Add Procurement

Created in	Last changed	Procurement	Reference No.	Contract Date
R.3	11/30/2023 2:26 PM	test		
R.2	10/13/2023 12:46 PM	1		

Image 13. “Public procurements” tab’s overview list



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The section with the procurement details is partly shown in the next image and its following fields are **mandatory**:

- Supplier name;
- Contract Name;
- Reference number (CIG number to be indicated here for Italian partners; a relevant procurement identification number to be indicated here for Croatian partners);
- Contract type (in line with the latest applicable EU rules – Directive 2014/24/EU or subsequent EU rule in force);
- Contract amount;
- VAT;
- Currency

 Edit Procurement

Created in
R.2

The contract name defined here can then be selected in the list of expenditures to link expenditure items to this contract.

Procurement
1

Reference No.

Contract Date (MM/DD/YYYY)



Contract Type

Contract Amount

15.000,00

Please select a currency
EUR

Supplier name

VAT Number
123456

Image 14. Public procurement's details section (excerpt)



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The Contract Name shall be reused in the List of expenditures. It is therefore important that the partner provides a distinct name for the procurement, so that it can be easily identified and linked to in the “List of Expenditures” tab. The procurement details can be edited only in the Partner Report where procurement was created, while report is in status Draft. After submission, fields are locked for editing.

In the EC Regulation it is requested that beneficial owners and subcontracts are listed in the procurements section.

Beneficial owner(s) of the contractor

First name	Last name	Date of birth
First name	Last name	Date of birth

+ Add beneficial owner

Subcontract(s)

Contract name	Reference number	Contract date	Contract Amount
Contract name	Reference number	Contract date (M... 	Contract Amount 0,00

+ Add subcontractor

Image 15. Beneficial owners and Subcontracts subsections

If an item is added, **VAT Number/Tax identification number is a mandatory field to be filled-in before saving**. Beneficial owner(s) and subcontractors can be added in any draft Partner Report after the procurement was created, but items added in previously submitted Partner reports are locked for editing/deletion.



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Procurement related attachments can also be added in this section. Attachments can be added in any draft Partner Report after procurement was created but uploads from previously submitted reports are locked for editing/deletion.



Image 16. Attachments subsection

GDPR sensitive data can be uploaded in section GDPR Attachment(s). Visibility of this section can be configured in Project privileges. A user without privilege to view sensitive data cannot download a file in this section and can also not see File name and Description.

For detailed information concerning the configuration, please refer to the “Project Privileges and Notifications” chapter in the *Manual for starting the project implementation in Jems*.

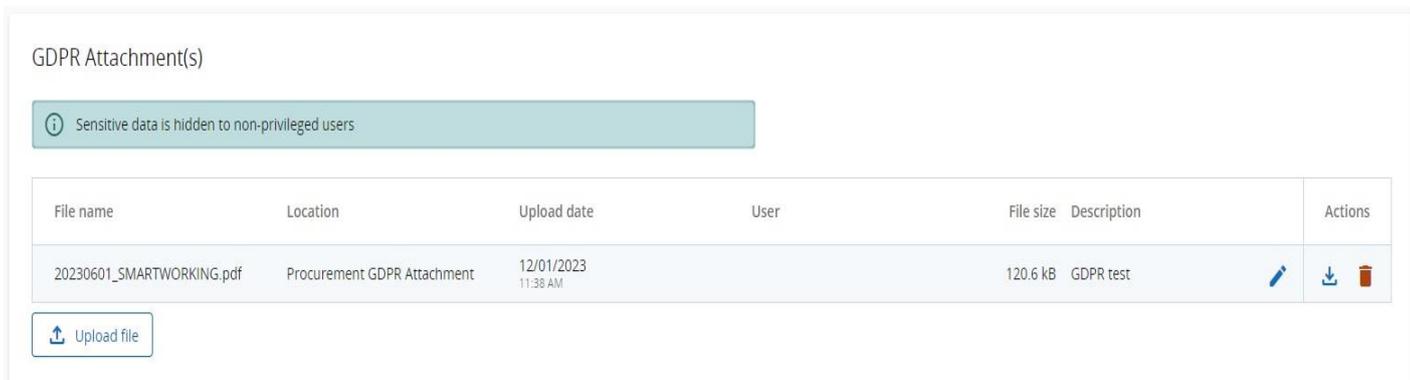


Image 17. GDPR Attachments view with privilege to view sensitive data



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GDPR Attachment(s)

Sensitive data is hidden to non-privileged users

File name	Location	Upload date	User	File size	Description	Actions
*****.***	Procurement GDPR Attachment	12/01/2023 11:38 AM		120.6 kB	*****	

Image 18. GDPR Attachments view without privilege to view sensitive data

⚠ POINT OF ATTENTION:

Since this tab is cumulative, one should understand the following unique aspects of this tab:

- Regardless in which report a procurement is added, it will show up in all following partner reports.
- The procurement can only be deleted and edited in the report where it was created.
- Beneficial owners, Sub-contractors and attachments can still be added in following reports.

1.4. "List of expenditures" tab

The "List of expenditures" tab is the place where partner users list incurred costs in original currency. It consists of two sections: List of expenditures and Parked expenditures.

⚠ POINT OF ATTENTION:

- It is of utmost importance to fill in all the "List of expenditure" fields providing the requested details.
- **In case a partner user had no expenses during the relevant reporting period, he must in this tab add one expenditure with declared amount 0,00 EUR.** Any available cost category can be used for this dummy expenditure.



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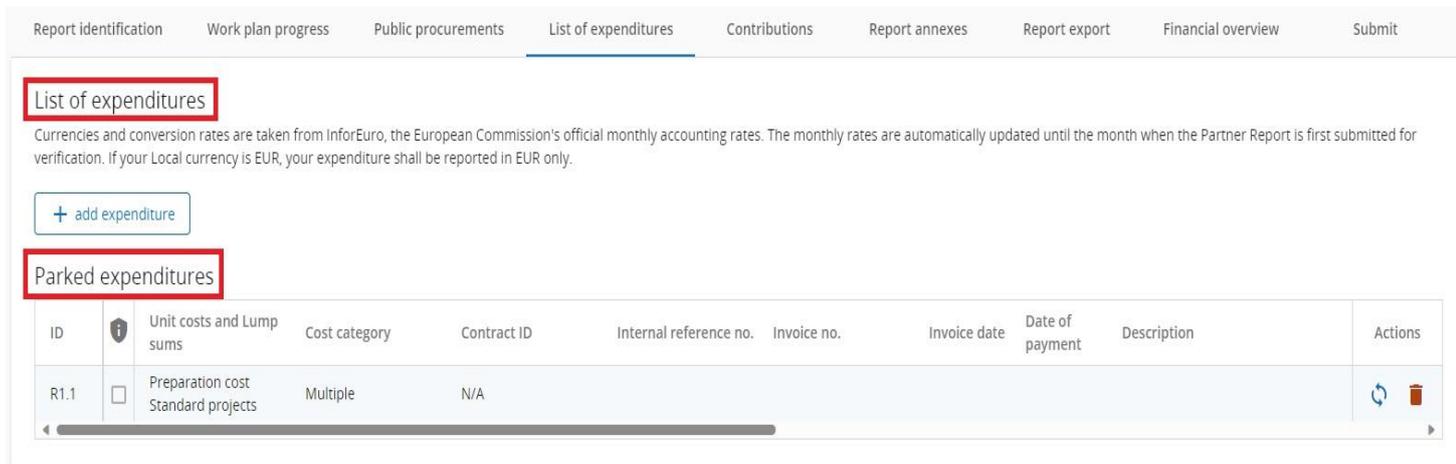


Image 19. List of expenditures and Parked expenditures sections of “List of expenditures” tab

In case a controller parked some items in finalized Control Reports, they show up in the Parked expenditure section. A partner user can decide to either re-include the item by clicking the re-inclusion button or delete the item. When the item gets re-included, it will get included in the List of expenditure section. For more details on the parking functionality, please read the Control Report chapter of this Manual, section “Expenditure verification” tab.

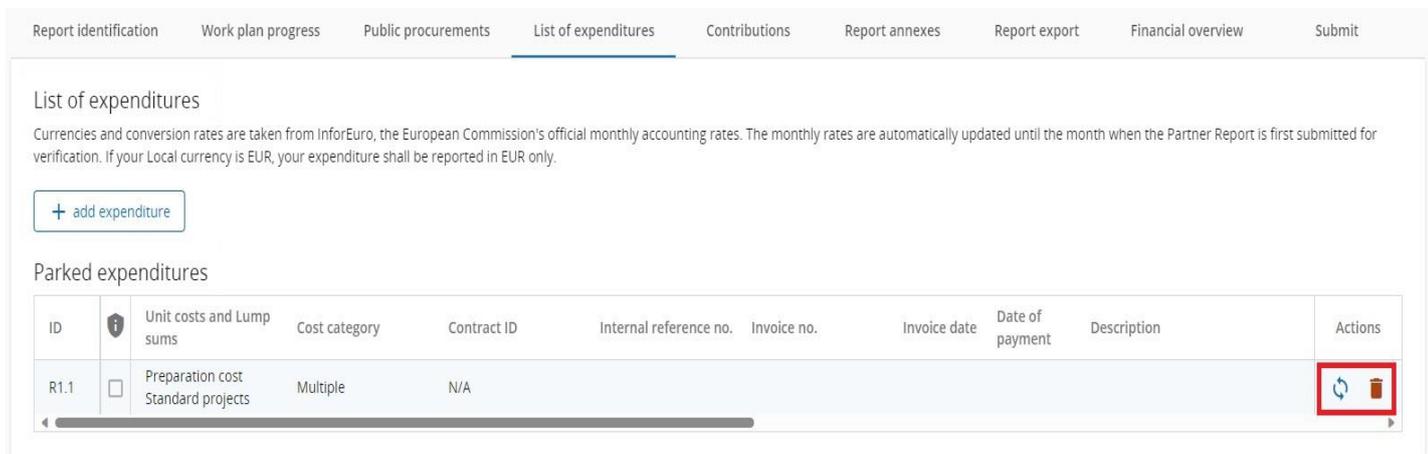


Image 20. Location of the re-inclusion and deletion buttons for Parked expenditures

By clicking the “+add expenditure” button, the partner can add expenditure items, one by one. Each expenditure item has a set of input fields described below.

ID
This running number is always in the format R[report number].X. The ID is dynamic in draft status (reports created have seamless consecutive numbering, even if a report is deleted), however it will be frozen upon submission of the report. The number will be used later on to identify cost items coming from another (previous) report (through parking of expenditure).



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List of expenditures

Currencies and conversion rates are taken from InforEuro, the European Commission's official monthly accounting rates. The monthly rates are automatically updated until the month when the Partner Report is first submitted for verification. If your Local currency is EUR, your expenditure shall be reported in EUR only.

ID	Unit costs and Lump sums	Cost category	Contract ID	Internal reference no.	Invoice no.	Invoice date	Date of payment	Description	Comr
R3.2	<input type="checkbox"/> N/A	* Please select a c...	N/A			<input type="text"/>	<input type="text"/>		<input type="text"/>

Image 21. An expenditure item's Input fields, Part 1

GDPR Flag

Partner user with privilege Sensitive data set to active in Project privileges can flag expenditure items that are GDPR sensitive. In this case, users without Sensitive data privilege active will not be able to see the contents of Description, Comment and Attachment fields.

Unit costs and Lump sums

Lump sums from the Last approved Application Form are added to this dropdown. When choosing Lump sum item in the dropdown, some cells are automatically filled-in and locked. For a real cost item N/A (pre-filled as default option) shall be chosen.

Cost category

This field links the cost item to a cost category. Cost categories available in the Application form budget can be selected here. When a lump sum was chosen in the previous field, this field is pre-filled with the respective cost category if the lump sum is a single cost category or "Multiple" if the lump sum covers more than one cost category.

Investment No.

This field links expenditure to investment items in the Application Form if the project has investments. If the project has no investments this field is hidden in the report. This field is locked when a lump sum is chosen.

Procurement

This field is used to link expenditure to public procurements. All contract names created by the partner in the public procurement section show up here. This field is locked when a lump sum is chosen.

Internal reference no. & Invoice no.

These input fields can be used to identify the expenditure. These fields are locked when a lump sum is chosen.

Invoice Date & Date of Payment

Date pickers to be entered by the partner. These fields are locked when a lump sum is chosen.



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Description & Comment

Here the partner can provide further justification on the cost item. These fields are anonymized for expenditure items flagged GDPR sensitive and content is not displayed to users without Sensitive data privilege.

Number of units

This field is locked when a normal cost is entered. In case a normal cost needs to be entered with more units than 1, it is recommended to report them as individual items or to report them as one grouped cost item. If lump sums are chosen, this field is automatically pre-filled with 1 and locked.

List of expenditures

Currencies and conversion rates are taken from InforEuro, the European Commission's official monthly accounting rates. The monthly rates are automatically updated until the month when the Partner Report is first submitted for verification. If your Local currency is EUR, your expenditure shall be reported in EUR only.

ID	Comment	Total invoice value	Number of Units	Price per unit	VAT	Declared amount	Currency	Conversion rate	Declared amount in EUR	Atta
R3.?	<input type="checkbox"/>	0,00			0,00	0,00	EUR	1	0,00	

Image 22. An expenditure item's Input fields, Part 2

Price per unit

This field is always locked and automatically calculated or taken from the Application Form. It is only used for Lump sums and is blank in all other cases. The partner share of the Lump sum is automatically pre-filled here.

Total invoice value & VAT

Here the partner can add the invoice value and VAT value. These fields are locked when a lump sum is chosen.

Declared amount

The Declared amount is based on Total invoice value and VAT. It is the value the partner claims as basis for reimbursement, i.e. **this amount will be checked by the controller for eligibility**. If in foreign currency, this value is the basis for calculation of the Declared amount in EUR. This field is locked when a lump sum is chosen.

Currency & Conversion rate & Declared amount in EUR

The currency field is the only input field of these 3 fields. The other fields are automatically calculated. **Euro partners can only declare costs in Euro.**

Attachments

Upon creation of an expenditure item it is not possible to add attachments. After the item has been saved for the first time, one file can be uploaded to each item - which will show up in a chip style form.



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List of expenditures

Currencies and conversion rates are taken from InforEuro, the European Commission's official monthly accounting rates. The monthly rates are automatically updated until the month when the Partner Report is first submitted for verification. If your Local currency is EUR, your expenditure shall be reported in EUR only.

ID	Total invoice value	Number of Units	Price per unit	VAT	Declared amount	Currency	Conversion rate	Declared amount in EUR	Attachments
R3.1	0,00			0,00	0,00	EUR	1	0,00	Jems...

Image 23. An expenditure item with attachment uploaded

When a file is uploaded, the related expenditure item cannot be deleted. After the attachment has been deleted, the expenditure can be deleted again. If a user needs to upload multiple files to one cost item, it is recommended to upload a .zip or .rar file.

1.5. “Contributions” tab

POINT OF ATTENTION:

- Only HR partners will use this section.

Report identification							Work plan progress							Public procurements							List of expenditures							Contributions							Report annexes							Report export						
Follow-up of partner contribution							In this section, partners organisations are expected to list the partner contributions as they incur in reality (amounts received by partner). Partner organisations are advised to navigate to the financial overview to see the breakdown of the total reported amount per contribution source.																																									
Name of organisation / Source of contribution	Legal status	Amount in AF	Previously reported	Current report	Total reported so far	Attachments																																										
		26.600,00	0,00	0,00	0,00	⬆																																										
+																																																
Sub-total public contribution		0,00	0,00	0,00	0,00																																											
Sub-total automatic public contribution		0,00	0,00	0,00	0,00																																											
Sub-total private contribution		26.600,00	0,00	0,00	0,00																																											
Total		26.600,00	0,00	0,00	0,00																																											

Image 24. “Contributions” tab with indicated Current report field to be filled-in at the end of Partner Report drafting, see Image 27.



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The “Contributions” tab is a cumulative section, which records amounts received per report and adds them up in next reports. **The partner users must always fill in the contributions as defined in the current report in the tables found in the “Financial overview” tab.** It is recommended to fill this tab in only after the partners have already filled in the entire “List of expenditures” tab.

The contributions automatically displayed on this page come from the last approved Application form, where the first row is always the partner organisation’s own contribution. A partner can also add contributions by clicking the “+” button which will add a row, allowing them to indicate new contributions received (without going through a project modification). If the contributions are changed in a project modification, the changes shall apply to newly created reports after the approval of the modification. Previously reported amounts will of course still show up in the existing rows.

Per row, per report, only one file can be uploaded as attachment. As goes for similar sections, if more files should be uploaded it is recommended to upload a .zip or .rar file.

⚠ POINT OF ATTENTION:

- When a new Partner Report is created, it shall take into account values of all previously submitted reports at that moment. Therefore, if you want to have the correct amounts in the “Previously reported” and in the “Total reported so far” columns, make sure that all previous Partner reports are submitted before opening a new report.

1.6. “Report annexes” tab

This tab shows all files uploaded in the Partner Report. The tree structure represents the places within that report where files can be uploaded. All uploads from all tabs are shown in this list.

Image 25. “Report annexes” tab



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Partner users have the possibility to upload additional files linked to the Partner Report here (by clicking the Upload file button).

Since it is not always possible to add descriptions to files in the dedicated tabs (due to the chip style upload), users with edit right can add those descriptions within this tab.

POINT OF ATTENTION:

- Files uploaded in this tab can be deleted here, other files can only be deleted in the tab where they were uploaded.

1.7. “Report export” tab

In this tab partner users can export their Partner Report to a PDF file. They can also export the Partner Report’s budget to a .XLS file.

Image 26. “Report export” tab

1.8. “Financial overview” tab

The tables found in the “Financial overview” tab show how the partner organisation is proceeding in terms of spending. The amounts included in the tables represent the aggregation of data from all Partner reports submitted, by the date when the current Partner Report was created.

“Previously reported” column is displaying separately in a second row how much of the total was previously parked by control.



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“Current report” column is displaying separately in a second row how much of the total was previously parked by control and reincluded in the current Partner Report.

“Total eligible after control for current” column sums up total eligible costs certified by control and only shows up in the Partner Report overview tables once control work is finalized.

Partner Expenditure - summary (in Euro)

This table shows the total partner budget, previously reported, current report, previously paid - divided per fund and contribution type (public/private/automatic public) and also shows some calculations using figures from the table.

For contribution type, the split per partner contribution is calculated horizontally, using the figures from the table and from the Application form, namely “AF amount of contribution” / “AF partner eligible budget” * “Total current report”, rounded down to whole cents.

“Previously reported” column sums up amounts from Partner reports previously submitted (including reopened ones). Amounts that were previously parked by control are displayed in the second row in this column.

“Remaining budget” column indicates the difference between Total reported so far and Partner total eligible from the Application form. This value can become negative in case the reported expenditures exceed the budget in approved AF.



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Report identification	Work plan progress	Public procurements	List of expenditures	Contributions	Report annexes	Report export	Financial overview	Submit
-----------------------	--------------------	---------------------	----------------------	---------------	----------------	---------------	---------------------------	--------

Financial overview

The amounts included in tables below represent the aggregation of data from all partner reports submitted, by the date when the current partner report was created. Beware that only the last partner report created has the most up-to-date aggregated data (in case partner reports were not submitted in the same order they were created)!

Partner Expenditure - summary (in Euro)

	Partner total eligible budget	Previously reported ⓘ	Current report	Total reported so far	% of total	Remaining budget ⓘ	Previously validated ⓘ	Previously paid ⓘ
ERDF	106.400,00	0,00 parked 0,00	11.200,00 re-included 0,00	11.200,00	10,53 %	95.200,00	0,00	0,00
Partner contribution ⓘ	26.600,00	0,00 parked 0,00	2.800,00 re-included 0,00	2.800,00	10,53 %	23.800,00	0,00	N/A
↳ of which Public contribution	0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00	N/A
↳ of which Automatic public contribution	0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00	N/A
↳ of which Private contribution	26.600,00	0,00 parked 0,00	2.800,00 re-included 0,00	2.800,00	10,53 %	23.800,00	0,00	N/A
Total	133.000,00	0,00 parked 0,00	14.000,00 re-included 0,00	14.000,00	10,53 %	119.000,00	0,00	0,00

Image 27. “Financial overview” tab - Partner Expenditure - summary (in Euro) table, with indicated amount to be used in “Contributions” tab, see Image 24.

“Previously validated” column indicates the sum of Total eligible after control at the moment of creation of current Partner Report.

“Previously paid” column indicates amounts related to funds paid by the Programme. They will be added to this column in the next created report after payment is confirmed in the system.



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Partner Expenditure - breakdown per cost category (in Euro)

Partner Expenditure - breakdown per cost category (in Euro)

Cost category	Flat rate	Partner total eligible budget	Previously reported ⁽ⁱ⁾	Current report	Total reported so far	% of total	Remaining budget	Previously validated ⁽ⁱ⁾
Staff costs		95.000,00	0,00 parked 0,00	10.000,00 re-included 0,00	10.000,00	10,53 %	85.000,00	0,00
Office and administrative costs		0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00
Travel and accommodation		0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00
External expertise and services		0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00
Equipment		0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00
Infrastructure and works		0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00
Other costs	40 %	38.000,00	0,00 parked 0,00	4.000,00 re-included 0,00	4.000,00	10,53 %	34.000,00	0,00
Lump sum		0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00
Total		133.000,00	0,00 parked 0,00	14.000,00 re-included 0,00	14.000,00	10,53 %	119.000,00	0,00

Image 28. “Financial overview” tab - Partner Expenditure - breakdown per cost category (in Euro) table

This table shows the total partner budget, previously reported and current report - split per cost category. The table behaves quite similarly as the other tables with similar columns. There are however a few unique elements that are important to note in regard to the Simplified Cost Options:

1. Flat rate is only calculated in the overview table on the totals declared in the current report and not on top of each individual cost item.
2. Lump sums covering multiple cost categories always show up in their own separate row and are never added up in specific cost categories. Flat rates are not calculated on top of the Lump sums covering more than one cost category.

Partner Expenditure - breakdown per Lump sum (in Euro)

This table shows the Lump sums and their partner share. Lump sums declared in the list of expenditure show up in the “Current report” column.

Partner Expenditure - breakdown per Lump sum (in Euro)

Lump sum	Partner total eligible budget	Previously reported	Current report	Total reported so far	% of total	Remaining budget	Previously validated ⁽ⁱ⁾	Previously paid ⁽ⁱ⁾
Preparation cost Standard projects - ...	0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00	0,00
Total	0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00	0,00 %	0,00	0,00	0,00

Image 29. “Financial overview” tab - Partner Expenditure - breakdown per Lump sum (in Euro) table



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Partner Expenditure - breakdown per investment (in Euro)

In this overview table all cost items linked to an investment are summed up. What is important to note is that no Simplified cost items are added up to this table, as they are automatically calculated on top. Only real costs linked to the investment in the “List of expenditures” tab are displayed in this overview table.

⚠ POINT OF ATTENTION:

- This table is hidden when no investments are used in this project.

1.9. “Submit” tab

In this tab the Partner Report can be submitted.

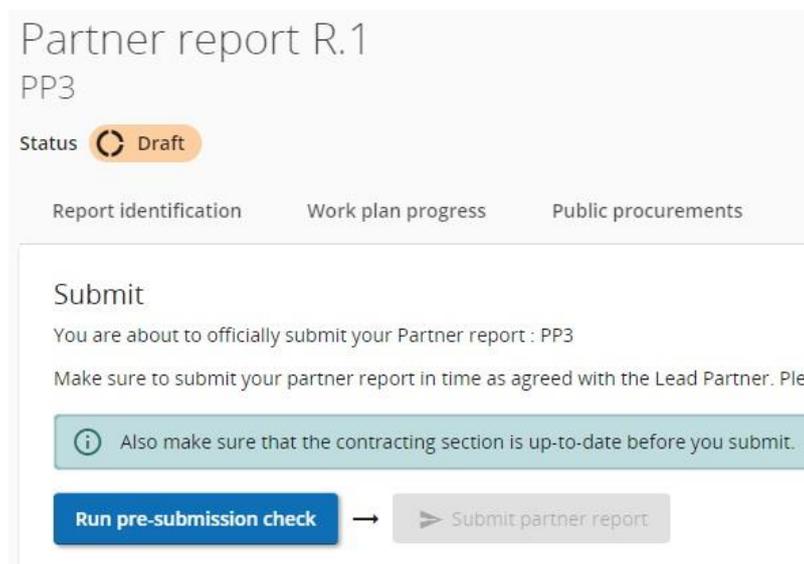


Image 30. “Submit” tab

Before submission, partner users must click on the “Run pre-submission check” button in order for the system to check the Partner Report for possible errors and to, in case none were found, enable the button “Submit partner report”.

To finally submit the Partner Report, partners must click on the “Submit partner report” button. After submission, the Partner Report is frozen, and the control work can be started.

Once submitted, the status of the report changes, which is shown in the “Report identification” tab.



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- Report identification
- Work plan progress
- Public procurements
- List of expenditures

A.1 Partner progress report identification

Project ID and acronym	ITHR
Partner report ID	R.1
Partner report status	Draft → Submitted →
Partner number	PP3
Name of the organisation in original language	
Name of the organisation in english	
Legal status	Private for-profit
Type of partner	SME
Partner organisation can recover VAT for project activities	Yes
Co-financing source and rate	ERDF 80,00%
Country	Hrvatska (HR)
Local currency (according to InforEuro)	EUR
AF Version linked	2.0

Image 31. “Report identification” tab showing the change in Status for Partner Report

Change in the status of the report is also shown in the report overview, where also the submission date is logged.

Reporting Partner reports

PP3

[+ Add Partner Report](#)

ID	Status	Included in project report	AF version linked	Reporting period	Date of report creation	Date of first submission
R.1	Submitted		2.0		12/01/2023 8:59 AM	12/04/2023 9:29 AM

Image 32. Submission date logged in the Partner reports overview table



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2. Control Report

By clicking the “Start control” button, Controllers with Edit right belonging to the control institution assigned to a project partner can start their control work for a Submitted Partner Report. “Start control” button can be accessed in two different ways as presented in the following two images:

Reporting
Partner reports

LP1

ID	Status	Included in project...	AF version linked	Reporting period	Date of report...	Date of first submission	Last submission	Amount submitted	Control end date	Total eligible after control for current...	Control
R.3	Submitted		2.0		11/30/2023 2:24 PM	12/08/2023 1:04 PM		24.000,00			Start control
R.2	Certified	PR.1	2.0	Period 2, month 7 - 12	10/13/2023 12:45 PM	10/13/2023 12:47 PM		50.600,00	12/04/2023 8:06 AM	33.600,00	Open controller work
R.1	Certified	PR.1	2.0	Period 1, month 1 - 6	10/13/2023 11:46 AM	10/13/2023 11:50 AM	10/13/2023 12:38 PM	65.580,00	10/13/2023 12:44 PM	41.580,00	Open controller work

Image 33. Accessing “Start control” button from the “Partner reports” overview table

Partner report R.3
LP1

Status Submitted **Start control** Reopen partner report

Report identification Work plan progress Public procurements List of expenditure

A.1 Partner progress report identification

Project ID and acronym	ITHR
Partner report ID	R.3
Partner report status	Draft Submitted
Partner number	LP1
Name of the organisation in original language	
Name of the organisation in english	

Image 34. Accessing “Start control” button from inside the Partner Report



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Once control is started, the “Start control” button changes to the “Open controller work” button, as shown in the following image.

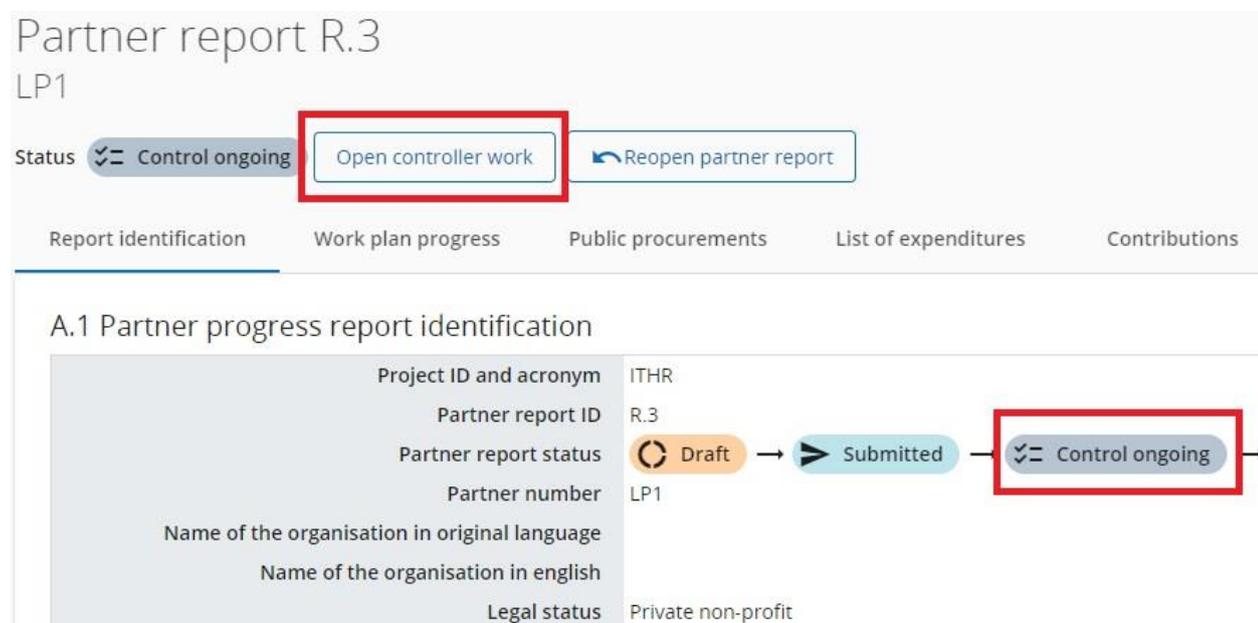


Image 35. “Open controller work” button activated inside the Partner Report in status Control ongoing

⚠ POINT OF ATTENTION:

- By clicking on the row in the “Partner reports” overview table, the users can navigate to the Partner Report.
- By clicking on the “Open controller work” button from inside the Partner Report, the users can navigate to the Control Report.

The Controller has access to all five Control Report tabs:

1. Report Identification,
2. Expenditure verification,
3. Control communication,
4. Control checklists, and
5. Overview and Finalize.

By clicking on the “Open controller work” button shown in Image 35., the Control Report can be opened by:

1. Controllers belonging to control institution assigned to the partner - they can view all Control Report tabs



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- partner users - they can only view the “Control communication” tab of the Control Report while the control is in status Control ongoing, and all tabs of the Control Report after the Control Report is finalised
- all monitor users that have access to the Partner Report (have privilege to View/Edit partner reports)

Users can also switch view from Control Report to Partner Report, as presented in the following image.



Image 36. “Switch to partner report” button inside the Control Report

2.1. “Report Identification” tab

In the top part of the “Report Identification” tab, Controllers can see pre-filled Partner Report information.

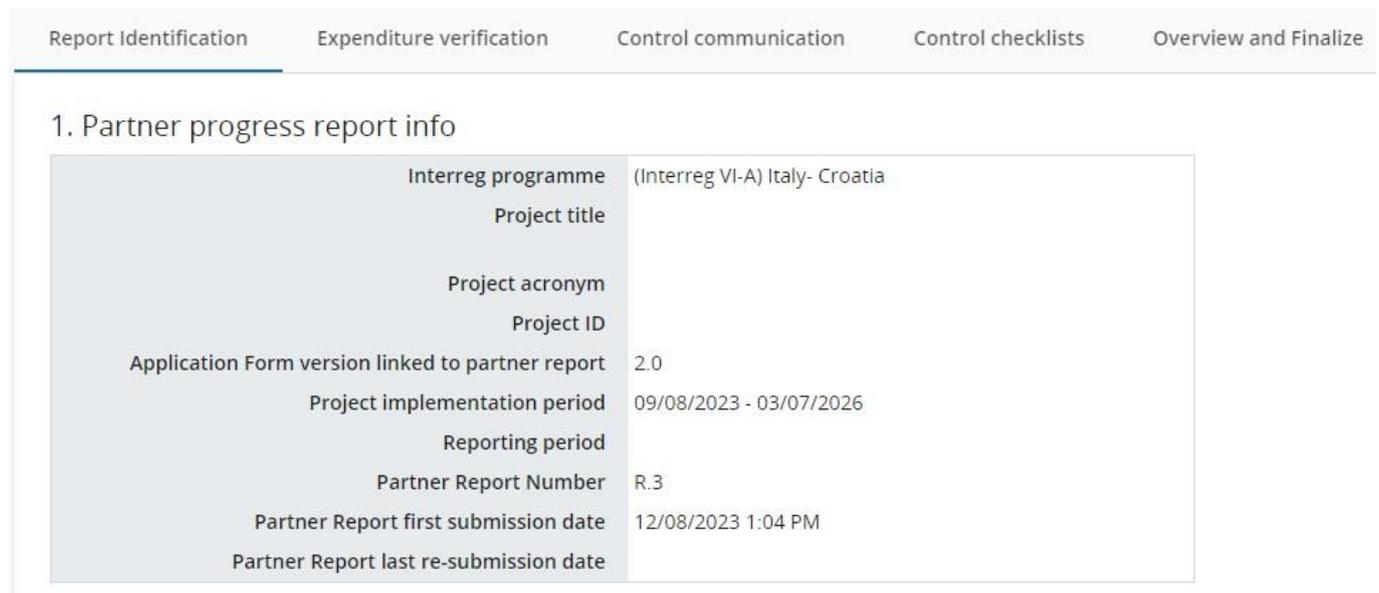


Image 37. “Report Identification” tab’s top table



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Below the top table in this tab, Controllers can also fill in basic identification information about the control work:

1. Format of supporting documents (Originals/Copy/Electronic)
2. Type of partner report (Partner report/Final report)
3. Designated Project partner controller - the information filled in the “Controller name” field in this section will automatically be imported in the Control Report PDF generated in the “Overview and Finalize” tab
4. General methodology used for the control, including dates and basic information about the on-the-spot verification
5. Risk-based verification general description



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4. Verification

General methodology (multiple selection possible):

- Administrative verification
- On-the-spot verification

List of on-the-spot verifications:

Date	Location (multiple selection possible)	Focus
From: <input type="text"/> To: <input type="text"/>	<input type="checkbox"/> Premises of project partner <input type="checkbox"/> Project event/meeting <input type="checkbox"/> Place of physical project output <input type="checkbox"/> Virtual	<input type="text" value="Enter text here"/>

+ Add on-the-spot verification

Risk-based verification applied

Yes No

If (yes), briefly describe sampling methodology and indicate where a detailed description can be found. For example, include additional information on the scope and on the percentage checked.

Image 38. “Report Identification” tab – part 4. Verification

⚠ POINT OF ATTENTION:

- No input field is by default mandatory in this tab. However, the default pre-submission check provided with Jems requires information to be filled in the “Controller name” field.



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2.2. “Expenditure verification” tab

In the “Expenditure verification” tab, all expenditure items from the Partner Report’s “List of expenditures” tab are listed (including attachments) and Controllers can fill in the results of their control work per item.

Expenditure verification

Controllers can verify expenditure in this section and justify corrections. Corrections are always in Euro, the conversion happened upon submission of the partner report.

ID	Unit costs and Lump sums	Cost category	Contract ID	Internal reference...	Invoice no.	Invoice date	Date of payment	Description	Comment
R3.1	<input type="checkbox"/> N/A	Staff costs	N/A						
R1.1	<input type="checkbox"/> Preparation cost Standa	Multiple	N/A						

Expenditure verification

Controllers can verify expenditure in this section and justify corrections. Corrections are always in Euro, the conversion happened upon submission of the partner report.

ID	Unit costs and Lump sums	Cost category	Total invoice value	Number of Units	Price per unit	VAT	Declared amount	Currency	Conversion rate
R3.1	<input type="checkbox"/> N/A	Staff costs	0,00	0,00	0,00	0,00	5.000,00	EUR	1
R1.1	<input type="checkbox"/> Preparation cost Standa	Multiple	0,00	1,00	17.000,00	0,00	17.000,00	EUR	1

Expenditure verification

Controllers can verify expenditure in this section and justify corrections. Corrections are always in Euro, the conversion happened upon submission of the partner report.

ID	Unit costs and Lump sums	Cost category	Declared amount in EUR	Attachments	Part of sample	Deducted amount in EUR	Certified amount in EUR	Typology of error	Park item	Comment
R3.1	<input type="checkbox"/> N/A	Staff costs	5.000,00	Jems survey...	<input checked="" type="checkbox"/>	0,00	5.000,00	N/A	<input type="checkbox"/>	
R1.1	<input type="checkbox"/> Preparation cost Standa	Multiple	17.000,00		<input checked="" type="checkbox"/>	0,00	17.000,00	N/A	<input type="checkbox"/>	

Images 39., 40. and 41. “Expenditure verification” tab – left-hand, middle, and right-hand parts



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While the Partner Report is in the status Control ongoing, this tab is visible only to Controllers belonging to the control institution assigned to the partner. After the control is finalized (report is in status Certified), the tab becomes accessible read-only to all users who have access to the Partner Report (including partner users assigned via Project privileges).

For each expenditure item, the Controller can:

1. Add item to sample
2. Deduct an amount and select a typology of error for the deduction
3. Park item
4. Add a comment

Add item to sample

When choosing which expenditure items are to be controlled, Controllers must respect the Programme's Methodology for Risk-based management verifications, already provided by the Programme to the Controllers. Each expenditure item thus chosen must then be manually added to the Control sample by switching the toggle button in the "Part of sample" column, as shown in the middle of Image 41.

POINT OF ATTENTION:

- If item was not in the sample, but the Controller fills in a deduction or parks the expenditure, then the expenditure item is automatically set as part of sample.

Deduct an amount and select a typology of error for the deduction

For each expenditure item, the deducted amount is pre-filled with 0 and the Controller can fill in a deduction - both positive and negative amounts are allowed. Once a deduction is filled in, it is mandatory to also select a typology of error for the respective deduction. The certified amount is automatically calculated as the difference between declared amount in Euro and the deducted amount.

Park item

The Controller can park expenditure by switching on the toggle button in the "Park item" column.

When parking, the expenditure item is locked, and the deducted amount and certified amount are both automatically set to 0. After the control work is finalized, the parked item will show up in the next Partner Report, in the "Parked expenditures" section of its "List of expenditure" tab, where the partner can decide what happens to the respective expenditure (either delete it or reinstate it in a new Partner Report, with or without modifications).

POINT OF ATTENTION:

- Parked expenditure items are not considered deducted amounts!



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Add a comment

The Controller can add a comment in the text field under the “Comment” column, either to justify a deduction or to provide other explanations, according to the Programme’s rules.

⚠ POINT OF ATTENTION:

- Flat rates (if any is used by the partner) are neither calculated, nor displayed in this tab, but they are calculated automatically and included in the financial overview tables in the “Overview and Finalize” tab.

2.3. “Control communication” tab

This section is quite unique in terms of privileges, as it is a shared file section, accessible to both Controller(s) belonging to the control institutions assigned to a partner and partner user(s) assigned via Project privileges. This section can be used to upload and download documents related to the Control Report.

When Control Report is in status Control ongoing, both Controller(s) and partner user(s) can:

- download any document
- upload, delete and edit the description of own uploads

Image 42. “Control communication” tab

When Control Report is in status Certified (after control is finalized):

- download is possible for any document
- new uploads can be added (by either Controllers or partners with edit rights)
- the description can be edited for own uploads
- deletion is disabled



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2.4. “Control checklists” tab

In this tab, the checklists of the type control related to the Control Report can be created, filled in and finished. To create a new checklist, users must first select a checklist template from a drop-down menu and then click the button “+ start new checklist”.

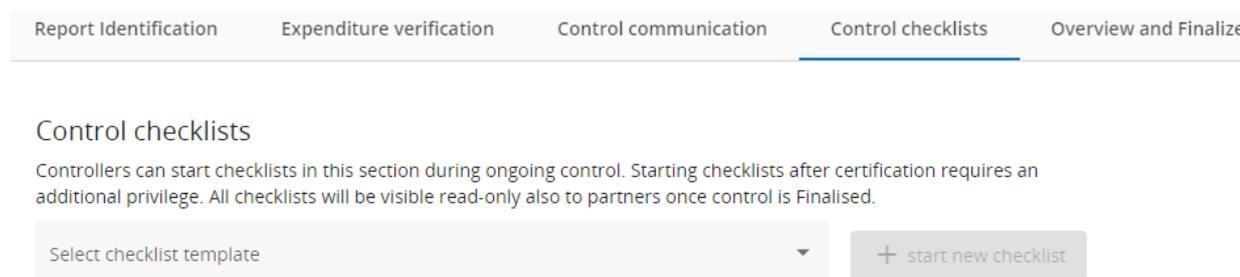


Image 43. “Control checklists” tab

Controller can:

1. edit only own checklist(s)
2. delete only own checklist(s) in status Draft
3. edit the description of any checklist
4. return any finished checklist to initiator (back to Draft - only checklist initiator can further edit it)
5. download any checklist

When the Control Report is in status Control ongoing or Control reopened, only Controllers belonging to the control institution assigned to the partner have access to this section.

When the Control Report is in status Certified (after control is finalized):

1. the entire tab becomes visible read-only to all users with access to the Partner Report (including partner users assigned via Project privileges)
2. checklists created before finalization of the control are locked for editing
3. a Programme user/Controller with the relevant system privilege can still create, fill in, download and finalize checklists - same rules as above apply for newly created checklists



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2.5. “Overview and Finalize” tab

This tab refers to the control work done for the current report and provides:

1. Overview of control work
2. Overview of deductions
3. Controller can fill-in further details about control work
4. Controller can generate PDFs of Control report and Control certificate
5. Controller can finalize control work

Overview of control work

This table consists of amounts related only to the current report (there is no cumulative data in this table).

Report identification	Expenditure verification	Control communication	Control checklists	Overview and Finalize		
Overview of control work for current report (in Euro)						
This is the summary of the control work only for current report. Flat rates are calculated on top of total eligible after control (with 2 decimals, rounded down) and Deducted amounts are calculated as difference of Total declared, Total eligible after control and Parked - thus any potential rounding differences will always go to Total deducted by control.						
Total declared by partner	Total included in control sample without flat rates added	% sampled from Total declared without flat rates	Total parked in current report ⓘ	Total deducted by control	Total eligible after control for current report	% Total eligible after control / Total declared by partner
24.000,00	22.000,00	100,00%	0,00	0,00	24.000,00	100,00%
↳ of which, flat rate: 2.000,00						

Image 44. “Overview of control work for current report (in Euro)” table

“Total declared by partner” column is copied from the Partner Report and flat rates are displayed also in a separate row.

“Total included in control sample” column is summing up the declared amount in EUR of the expenditure items marked as part of sample in the Expenditure verification tab. No flat rate is added on top!

“% sampled” column displays percentage of sampled out of declared (both without adding flat rates on top).

“Total parked in current report” column is summing up the declared amount in EUR of the expenditure items parked in the “Expenditure verification” tab. Flat rates are added on top and calculated according to the partner budget rounding settings (2 decimals, rounded down).

“Total deducted by control” column is calculated as difference of “Total declared by partner” minus “Total eligible after control” minus “Total parked in current report”. In this way, potential rounding differences (if any) will always go to “Total deducted by control” column.



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“Total eligible after control” column is summing up the certified amount in EUR of the expenditure items from the “Expenditure verification” tab. Flat rates are added on top and calculated according to the partner budget rounding settings (2 decimals, rounded down).

“% total eligible after control” column displays percentage of “Total eligible after control” out of “Total declared by partner” (both including also flat rates).

Overview of deductions

This table sums up deductions applied to this report from the “Expenditure verification” tab and displays also related flat rates (in Flat rates row) calculated according to the partner budget rounding settings.

Overview of control deduction for current report, by type of errors (in Euro)

This is the summary of control deductions only for current report, broken down by type of errors. Flat rates are calculated only once on top of totals, as follows: Total declared - Total eligible after control - Parked.

Type of errors	Travel and accommodation	External expertise and services	Equipment	Infrastructure and works	Lump sums	Unit costs	Other costs	Total
GENERAL FINDINGS: Expenditure incurred before or after the eligibility period	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
GENERAL FINDINGS: Expenditure outside of the eligibility area	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
GENERAL FINDINGS: Accounting and calculation errors at project level	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
GENERAL FINDINGS: Ineligible VAT or other taxes	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00

Image 45. “Overview of control deduction for current report, by type of errors (in Euro)” table (top part)

PROCUREMENT: Findings about subcontracting/subcontracting or irregularities...	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
STATE AID: Monitoring requirements not fulfilled	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
SIMPLIFIED COST OPTIONS: Wrong application of the methodology	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00
Flat rates (if applicable)							0,00	0,00
Total	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00

Image 46. “Overview of control deduction for current report, by type of errors (in Euro)” table (bottom part)



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Further details about control work

The Controller can fill in text in the input fields available in this section of the “Overview and Finalize” tab.

Control timing

This is where you can insert clarifications which were sent during the control process

* Start of control work 12/8/2023	
--------------------------------------	---

Date(s) of request(s) for clarifications, if applicable

Date(s) of receipt of satisfactory answers, if applicable

End of control work

Description of findings, observations and limitations

A description of the types of errors found and a reasoning on why it is an error. Also add: a clear specification of additional observations and limitations (if any) expressed about the eligibility of some expenditure.

Image 47. “Further details about control work” section of the “Overview and Finalize” tab (part 1)

The text filled in the field “Follow-up measures for next partner report” of a finalized Control Report is displayed for information purposes in the next Control Report in section “Follow-up measures from last certified report” (on yellow background), as seen in the next Image.



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Follow-up measures from last certified report (R.2)

 There is nothing to be displayed from last certified report 

Follow-up measures implemented in current report should be explained here.

Conclusions and recommendations

The conclusion takes into consideration the above-mentioned observations/reservations. It also describes the measures implemented to solve the errors detected, and it provides recommendations, where possible, to avoid repetition of the same types of errors in the future.

Follow-up measures for next partner report

Follow-up measures to be implemented in the next progress report should be described in this section.

Image 48. “Further details about control work” section of the “Overview and Finalize” tab (part 2)

 POINT OF ATTENTION:

- The text from the last certified report is displayed only while control is ongoing, and it is not included in the PDF export of the Control Report.

Generation of PDFs of Control report and Control certificate

In this section of the “Overview and Finalize” tab, by selecting a control export plugin, the Controller can, at any time, generate PDF exports related to the control work. There are two plugins provided: Control report and Control certificate.

 POINT OF ATTENTION:

- **In case Partner Report included only a dummy expenditure, the Controller shall not generate Control Report and Control Certificate.**



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Generate Control certificate & Report

Control certificate and Control report can be generated by controller both before and/or after control work is finalized. Generated certificate/report are listed in table below, can be downloaded, signed and uploaded.

Control export plugins
Control report - 1.0.2

Generate document

(i) There are no files uploaded. ✕

Image 49. “Generate Control certificate & Report” section of the “Overview and Finalize” tab – before generation

Generate Control certificate & Report

Control certificate and Control report can be generated by controller both before and/or after control work is finalized. Generated certificate/report are listed in table below, can be downloaded, signed and uploaded.

Control export plugins
Control certificate - 1.0.1

Generate document

File name	Location	Creation date ↓	User	File size	Description	Actions	Attachments
Control Certificate 1 - ITHRO...	Control certificate	12/11/2023 9:34 AM	itflcjs@test.it	220.3 kB			
Control Report 1 - ITHR0200...	Control report	12/11/2023 9:34 AM	itflcjs@test.it	246.3 kB			

Image 50. “Generate Control certificate & Report” section of the “Overview and Finalize” tab – after generation

Generated files are displayed in a list and can be downloaded anytime by any user with access to this tab. In this list, Controllers with EDIT permission can also upload an attachment (e.g. signed Control Report) per generated file. The deletion of the uploaded attachments is blocked once the control is finalized.

The status of control work **at the moment of document generation** (draft or finalized) is automatically displayed in the PDFs generated, as seen in the image below.

Control Certificate

Control Draft

Project title

Image 51. Top part of the PDF of a Control Certificate displaying its status (Control Draft or Control Finalized)



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/! POINT OF ATTENTION:

- Whenever a control work is finalized, a Control Report is automatically generated by the system.

Finalisation of control work

In this section of the “Overview and Finalize” tab, the Controller must run the pre-submission check and finalize the control work.

Finalize control



Image 52. “Run pre-submission check” and “Finalize control” buttons in the “Finalize control” section of the “Overview and Finalize” tab

After the finalisation of control work, Controller must go back into the certified report’s “Overview and Finalize” tab, **generate finalized Control Certificate and Control Report, sign both documents, and upload them as attachments**, in the section shown in Image 50.

/! POINT OF ATTENTION:

- Once control is finalized, all tabs of the Control Report become visible (read-only) to all users who have access to the Partner Report. The work done during control is locked, but users can still upload documents in the “Control communication” tab, Controllers can still upload attachments in the generated PDFs table in the “Overview and Finalize” tab (if nothing was uploaded during control as ongoing) and privileged users can still start, fill in and finalize checklists in the “Control checklists” tab.
- **In case Partner Report included only a dummy expenditure, the Controller shall Finalize control, without signing and uploading the automatically generated Control report.**



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2.6. Reopening Control Report

Whenever Partner Report is in status Certified, the Control Report can be reopened by a user with the system privilege Reopen control report. To reopen a Control Report, one must first navigate to the controller work by clicking the “Open controller work” button, either the one available in the “Partner reports” overview section, as seen in Image 33., or the one available within the relevant Partner Report, as seen in the Image below.

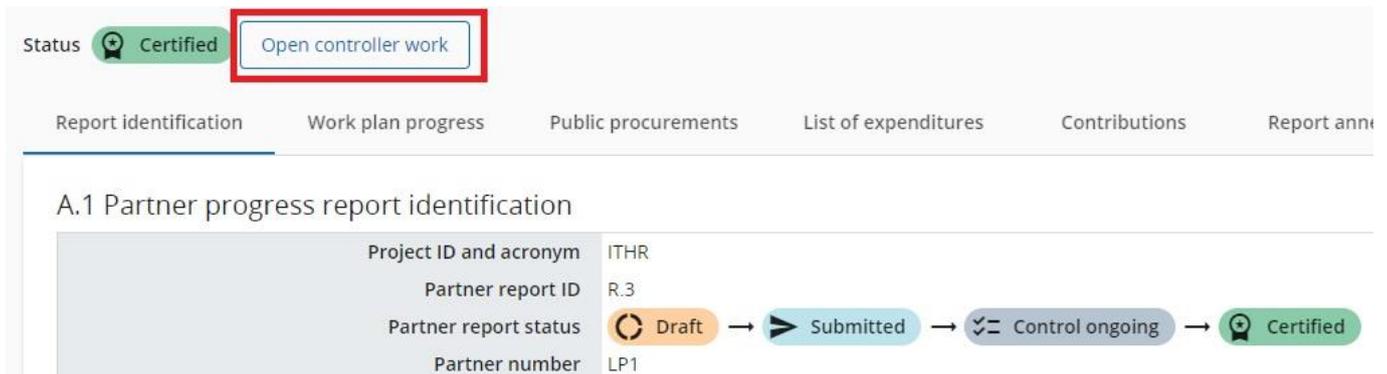


Image 53. “Open controller work” button, available within the relevant Partner Report

In the next window, a button should be available called “Reopen control report”

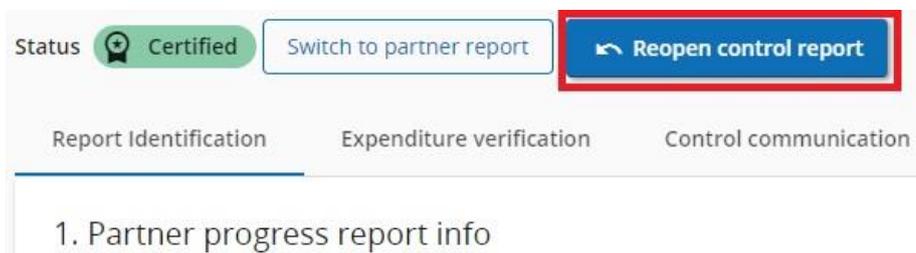


Image 54. “Reopen control report” button, available within the relevant Control Report

When reopening Control Report for a Partner Report in status Certified, the Partner Report will change its status to Control reopened and the Controller will again be allowed to edit his control work.

In Control Report for a Partner Report in status Control reopened, compared to the normal editing of a control work ongoing, the following elements behave differently:

- Control checklists - old checklists cannot be changed, new ones can be added
- Expenditure verification - user cannot unpark parked items
- Control communication - user cannot delete old uploads; user can only add new ones and can edit description to all own uploads
- Overview & Finalize - user cannot delete or replace already existing files



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POINT OF ATTENTION:

- Reopening Control Report is only possible when the certificate is not yet included in a Project Report. If you would like to reopen Control Report that is included in a Project Report, you must first exclude the certificate from that Project Report. Then the “Reopen control report” button will become available again.

When the Partner Report is in status Control reopened, a privileged user can also reopen the Partner Report, as seen on the image below. Partner Report can also be reopened when it is in status Submitted or Control ongoing, which is explained in the next section of the Manual.

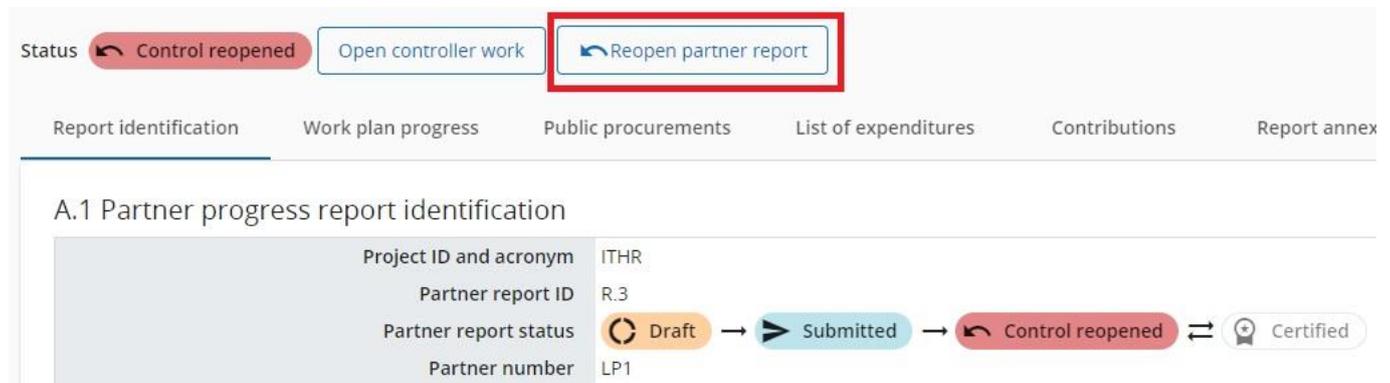


Image 55. “Reopen partner report” button, available within the relevant Partner Report in status Control reopened

2.7. Reopening Partner Report

A Partner Report in status Submitted or Control ongoing can be reopened from inside the Partner Report, by clicking the Reopen partner report button.

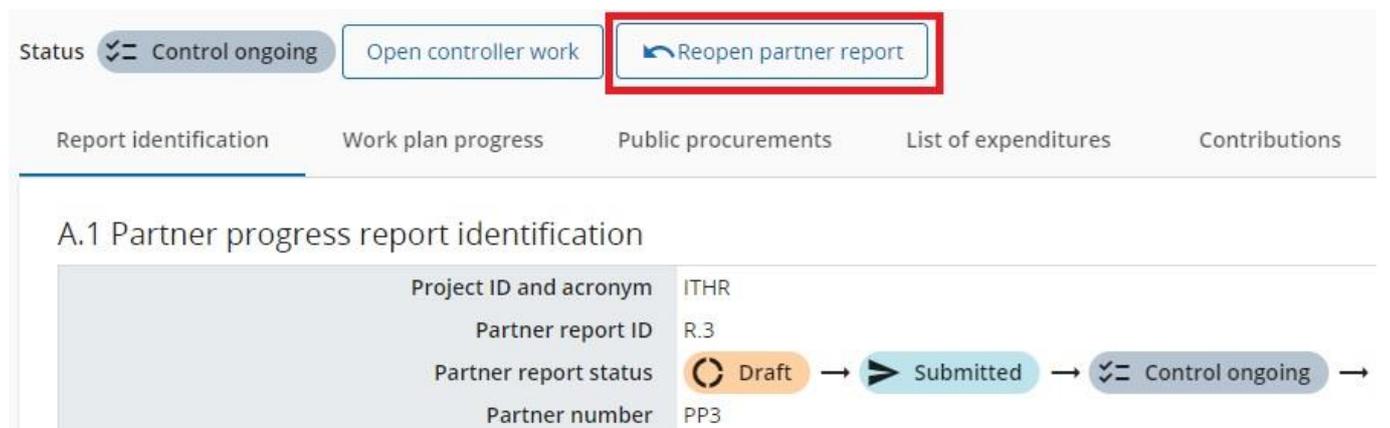


Image 56. “Reopen partner report” button, available within the relevant Partner Report in status Control ongoing



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⚠ POINT OF ATTENTION:

- Only a user with privilege Reopen partner report active can see and use Reopen partner report button.

Control work cannot be started/finalised while Partner Report is in status Reopened. Control work started before reopening a Partner Report is not lost and can be continued by Controller even while Partner Report is reopened, except for “Expenditure verification” tab and “Finalize control” button - which are locked until Reopened Partner Report is (re)submitted. In the “Expenditure verification” tab everything except “Parked” and “Comment” columns is reset upon resubmission of a Reopened Partner Report.

Upon (re)submission of a Reopened Partner Report, it goes back to the status from before reopening, namely Submitted or Control ongoing, no recalculation of exchange rates happens, financial overview tables are refreshed, reflecting changes done, and the Partner Report overview is populated with updated “Amount submitted” and “Date of last submission” data.

Reopening a Partner Report allows for changes in the initial report that cannot negatively impact aggregations and future partner reports, thus the following two situations can exist.

Reopening of the last Partner Report

When the Partner Report being reopened is the last one created by the project partner, it is fully reopened:

1. No data is cleared from the report, and all is editable, with the following exceptions in the “List of expenditures” tab:
 - a. expenditure item ID, currency and exchange rates are frozen from initial report
 - b. no new expenditure item can be deleted (but can be edited)
 - c. no new expenditure item can be added
 - d. Parked expenditure list is visible and any item from it can be deleted or added to the reopened Partner Report
2. Procurements created in the current Partner Report can be further edited, for older ones only new additions of beneficial owners/subcontractors/attachments is allowed.
3. Previous uploads are displayed and can be changed, except in “Report Annexes” tab, where user can only add new ones.

⚠ POINT OF ATTENTION:

- Creation of a new draft Partner Report is locked while the last Partner Report is Reopened.



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Reopening of any Partner Report that is not last

When the Partner Report being reopened is not the last one created by the project partner, it is partially reopened, i.e. no data is cleared from the report and only the following is editable:

1. “List of expenditures” tab:
 - a. following fields are editable: GDPR flag, Link to procurement, Description and Comment
 - b. no expenditure item can be deleted / no new expenditure item can be added
 - c. Parked expenditure list is not visible
 - d. Expenditure item attachment can be changed/uploaded
2. Public Procurements created in the current Partner Report cannot be deleted, but can be further edited, except procurement name, which is locked.
3. Contributions tab: only changing attachments is allowed
4. Report Annexes tab: user can add new uploads.

3. Project Report

Lead Partner’s Project manager (Application form user with the project privilege edit or manage) is the only one able to create, edit and submit Project Reports. For detailed information concerning the configuration, please refer to the “Project Privileges and Notifications” chapter in the *Manual for starting the project implementation in Jems*. Application form user shall be referred to as **Project manager** or PM for the remainder of this Manual.

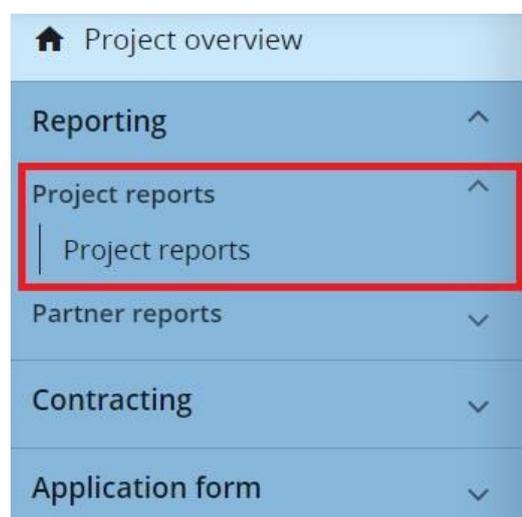


Image 57. Location of the “Project reports” section in the “Project overview” menu

Financial data of the Project Report is automatically filled in as certified amounts from all the project partners’ Control Reports are taken over. **The Project manager must still manually consolidate the content part of the report.**



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Project Report is created from within the “Project reports” overview table as seen in the image below.

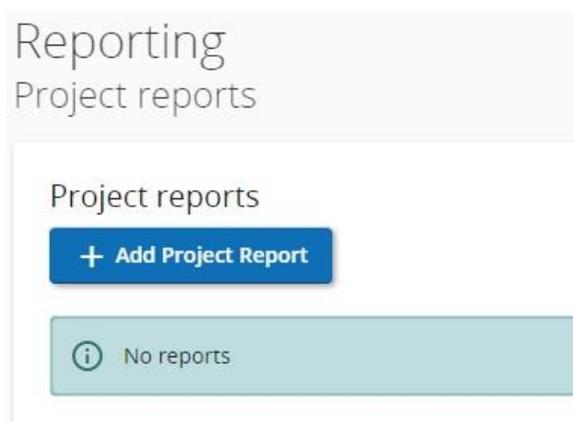


Image 58. “Project reports” overview table

When the “+Add Project Report” button is clicked, the Project manager lands on the “Create project report” form. When creating a Project Report the PM is obliged to choose one of the reporting deadlines. This will automatically complete the type of report and the deadline date for that reporting deadline.

Image 59. “Create project report” form



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When reports are created, they can always be accessed via the “Project reports” overview table. They can also be deleted in this table, but only when in status Draft, as seen in the image below.

Project reports

[+ Add Project Report](#)

ID	Status	AF Version linked	Reporting Period	Report Type	Date of report creation	Date of first submission	Delete
PR.1	Draft	2.0	Period 1, month 1 - 6	Both	12/08/2023 8:16 AM		

Image 60. “Project reports” overview table with Project Report in status Draft

POINT OF ATTENTION:

- Important to note is that the data from the last approved application form version is taken into the Project Report in the moment of its creation. Ongoing modifications will have no impact on the data in existing reports.
- Any data that are aggregated over several Project reports (e.g. aggregated spending, aggregated achievements, etc.) are summed-up from all project reports submitted by the date when the current Project Report was created.

Each Project Report is divided into eight tabs:

1. Project report identification,
2. Work plan progress,
3. Project results & Horizontal principles,
4. List of partner certificates,
5. Project report annexes,
6. Financial overview,
7. Report exports, and
8. Submit.



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3.1. “Project report identification” tab

Once the Project Report is created, the PM lands on the first tab called “Project report identification”. The fields completed in the creation of the project report window can still be changed within the report.

Project report PR.1

Project report identification | Work plan progress | Project results & Horizontal prin... | List of partner certificates

Project progress report identification

Project ID and acronym	ITHR
Project report id	PR.1
Project report status	Draft → Submitted → Verified → Paid
Name of the organisation in original language	
Name of the organisation in english	
AF Version linked	2.0

Reporting period start date (MM/DD/YYYY)

Reporting period end date (MM/DD/YYYY)

* Link to reporting schedule (contracting)
1, Period 1 month 1-6

Type of project report

Content
 Finance
 Both

Reporting period
Period 1, month 1 - 6

Reporting date (MM/DD/YYYY)
2/1/2024

Image 61. “Project report identification” tab’s top section



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The tab includes textboxes to describe the “Highlights of main achievements” and “Partner problems and deviations”. In addition, the tab includes the following overview tables: “Overview of Project outputs and result overview”, “Partner spending profile (in Euro)”, and “Target groups”.

Highlights of main achievements

Please describe project progress up to now including specific objectives reached and main outputs delivered by highlighting also the added-value of the cooperation. The summary should highlight main achievements, be interesting and understandable for non-specialists.

Overview of Project outputs and result overview

Programme Output Indicators not linked to a Programme Result Indicator

Programme Output Indicators not linked to a Programme Result Indicator	Measurement Unit	Baseline
		0,00
Programme Output Indicator:		
Output RCO116_4.1: Jointly developed solutions	solutions	
Output 3.2:	solutions	

Image 62. “Project report identification” tab’s middle section, part 1

“Overview of Project outputs and result overview” table provides an overview of Output indicators. In this table, they are listed separately, and their values are cumulative. Whenever a report is submitted, and a new report is created, the values from the previously submitted report are added to the “Previously Reported” column (to the right of the “Baseline” column, and not shown in the image above, are the following columns: “Target Value”, “Previously Reported”, “Current Report” and “Total Reported So Far”).

Textbox “Partner problems and deviations”, shown in the following image, must be used to list any deviation by the project, such as any change to the approved work plan, outputs and/or deliverables, any issue within partnership, such as bad communication, or low technical output, as well as any deviation in the spending profile.



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Partner problems and deviations

If applicable, please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solution found.

If applicable, please any deviations in the spending profile compared to the amounts indicated in the application form.

Image 63. “Project report identification” tab’s middle section, part 2

Another table is the “Partner spending profile (in Euro)”, as partially seen in the image below (to the right of the “Total reported so far” column, and not shown in the image below, are the following columns: “Cumulative target - total report so far”, Total report so far / cumulative target”, and “Next report forecast”). This table corresponds to the certificates included in the “List of partner certificates” tab. In case a certificate is included, the partners forecast is displayed in this table. In case a partner has multiple certificates included in one Project Report, the forecast from the last certificate is displayed here (providing the most accurate cumulative values and forecast).

Partner spending profile (in Euro)

The calculated amounts in the overview table below are certified amounts, coming from the included partner certificates in this project report. The forecast amount is an input field coming from the partner report.

Partner number	Period target	Current report	Cumulative target	Total reported so far (i)
LP1	50.512,00	75.180,00	118.024,00	75.180,00
PP3		14.000,00		14.000,00

Target groups

In the table below, you will see a list of the target groups you indicated in the application form. Please explain for each target group in what way and to what extent they were involved in your project in this reporting period.

Target Group	Description of the target group involvement
Higher education and research organisations	Enter text here

Image 64. “Project report identification” tab’s bottom section



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In the “Target groups” table, Project managers are requested to describe the target group involvement during the indicated reporting period, providing details of organisations involved, in order to avoid any double-counting.

POINT OF ATTENTION:

- The Project report identification tab is dynamic, in a sense that it responds to what is in the last approved application form.

3.2. “Work plan progress” tab

In the “Work plan progress” tab Project managers shall describe the progress on work packages including the project specific objective and communication objective, the planned investments, activities, deliverables and outputs. For the specific project, the reporting in the “Work plan progress” tab follows the logic of the work plan, as it was designed in the last approved version of the application form. If the work plan is changed during a project modification, the reporting logic will be adapted accordingly in all Project reports that are created following the approval of the new application form version.

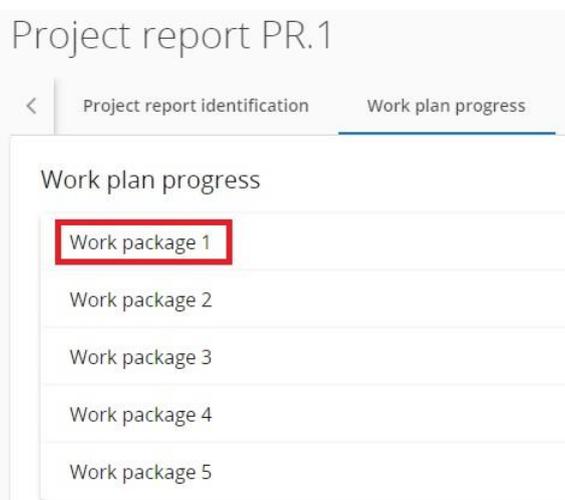


Image 65. “Work plan progress” tab’s overview



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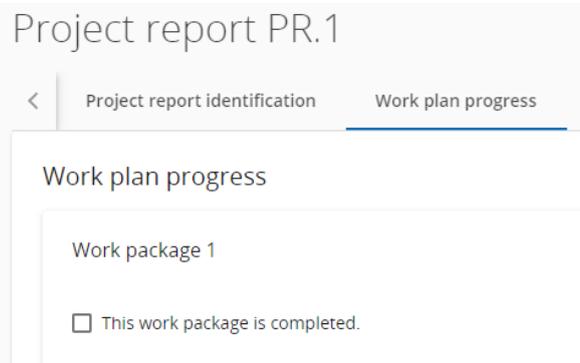


Image 66. “Work plan progress” tab’s WP1 expanded (top field only)

At the top of each Work package form, there is a tick box to confirm whether “This work package is completed.” The progress made on the Project specific objective and the Communication objective is to be described and there is a field to select the Status of the objectives. The project manager can select if the objectives have been “Fully achieved”, “Partly achieved” or “Not achieved”. Further, there is a textbox to describe the overall progress in the work package, as shown in the following image.

What is the progress towards the objectives in this work package as defined in the application form? Status should be cumulative.

Project specific objective

Project specific objective

Fully achieved

Partly achieved

Not achieved

Explanations

Communication objective

Communication objective

Status

Explanations

Progress

Please describe the progress in this reporting period and explain how the partners were involved (who did what).

Enter text here

Image 67. “Work plan progress” tab’s WP1 expanded (fields Project specific objective, Communication objective and Progress)

For each Investment, Activity and Output there is a separate section with text fields to describe the progress in the reporting period. Deliverable subsections are found within corresponding Activity sections. Similar as for objectives, for each activity there is a field to define the Status, as shown in a series of images



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below. In this section, progress in terms of capitalisation should be clearly described. The involvement of Associate Partners (if relevant) should also be briefly specified in the individual activities of the workplan.

Activities

Please indicate progress made in each activity and deliverable.

A 1.1
A 1.2
A 1.3

Outputs

Please indicate progress made in each objective.

O 1.1

Activities

Please indicate progress made in each activity and deliverable.

A 1.1 ^

Activity title

Start period Period 1, month 1 - 6	End period Period 1, month 1 - 6	Status v
---------------------------------------	-------------------------------------	---

Describe how you contributed to the progress made in this activity

Attachment: [↑](#)

D 1.1.1

Deliverable title

Delivery period Period 1, month 1 - 6	Achieved in this reporting period 0,00	Cumulative value 0,00
--	---	--------------------------

Progress in this report

Attachment: [↑](#)

Images 68. and 69. Activities and Outputs sections with Activities section (including Deliverable subsection) expanded



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Activities

Please indicate progress made in each activity and deliverable.

A 1.1
A 1.2
A 1.3

Outputs

Please indicate progress made in each objective.

O 1.1

Outputs

Please indicate progress made in each objective.

O 1.1 ^				
Output title				
Programme output indicator RCO84_4.1: Pilot actions developed jointly and implemented in projects		Measurement Unit pilot actions		
Delivery Period Period 1, month 1 - 6	Target Value 1,00	Achieved in this reporting period 0,00	Cumulative value 0,00	
Progress in this period				
Attachment: 📎				

Images 70. and 71. Activities and Outputs sections with Outputs section expanded



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For Deliverables and Outputs, there is also a number field available to fill-in how much was achieved in this reporting period. In this field, the Project manager can fill in a positive or a negative number. When inputting any numbers, a justification must always be provided to avoid any possibility of double-counting or miscalculation. Negative numbers could be used to correct achievements wrongfully reported in previous Project reports.

Deliverables and Outputs are cumulative, meaning that if a report is submitted and another report created, the values from the previous report are added to the cumulative values. The cumulative value achieved is calculated as the sum of all previous Project reports with the status submitted.

Project managers can also upload an attachment per item which will show up in the “Project report annexes” tab. In case multiple files should be uploaded per item, it is recommended to upload a zip or rar file.

POINT OF ATTENTION:

- When the first Project Report is created, the Status fields of the Project specific objective, the Communication objective or the Activities are empty. If a prior submitted Project Report exists, the Status fields of a newly created report are pre-filled with the Status selected for the respective objective or activity in the latest submitted Project Report (namely the submitted report with the highest report number, not latest by date of submission).

If the Project manager selects for the Project specific objective, the Communication objective or an Activity the status “Completed in this report”, there is a label added to the respective item.

The screenshot shows a user interface for a project report. At the top, there is a green checkmark icon followed by the text 'Project specific objective'. To the right of this text is a green rounded rectangle containing the text 'Completed in this report.'. Below this, there is a table with two columns: 'Project specific objective' and 'Status'. The first row contains the text 'investigation phase' under the first column and 'Fully achieved' under the second column. Below the table, there is a section labeled 'Explanations'.

Image 72. Label “Completed in this report” for Project specific objective

When the next Project report is created, all the items marked with “Fully achieved” in the previous submitted Project report receive a label with the wording “Completed in prior report. No changes.” and all completed texts and other data shall be automatically pre-filled in the following report.



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Project specific objective Completed in prior report. No changes.

Project specific objective investigation phase Status Fully achieved ▾

Explanations
 |
 0 / 2000 characters

Image 73. Label “Completed in prior report. No changes.” for Project specific objective

This label ensures that the Project manager and the MA/JS know that the respective Project specific objective, Communication objective or Activity was already previously completed, and no changes were made. If the Project manager changes the Status or revises data in a text or number field underneath the respective item, the label changes to “New changes after completion.”

Project specific objective New changes after completion.

Project specific objective investigation phase Status Fully achieved ▾

Explanations
 Something more happend in this period.

Image 74. Label “New changes after completion.” for Project specific objective

For Activities, the label is changed to “New changes after completion.”, if either there are changes within the Activity or any Deliverable within the Activity.

The same logic applies to the overall Work package completion. If a Work package was ticked as completed in a prior report, the label “Completed in prior report. No changes.” is shown at the top of the Work package.

Work package 2 Completed in prior report. No changes. ^

This work package is completed.

Image 75. Label “Completed in prior report. No changes.” for Work package



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If the Project manager changes any Status, textbox or number field within the Work package, the label changes to “New changes after completion.”.

Work plan progress

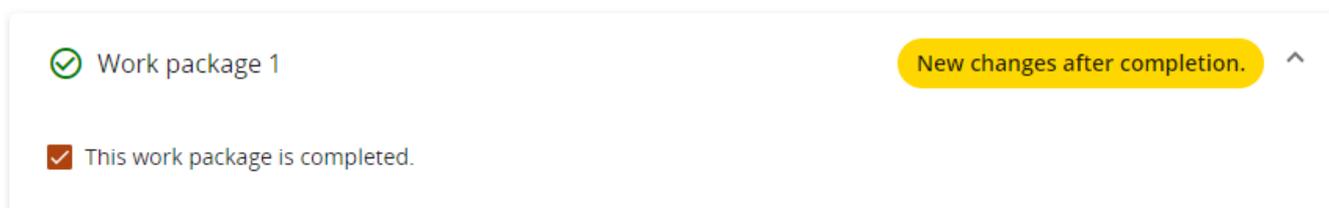


Image 76. Label “New changes after completion.” for Work package

3.3. “Project results & Horizontal principles” tab

In this tab Project managers must describe the project’s progress on results and horizontal principles. The progress on planned results must be described by inserting how much was achieved in the relevant reporting period. Results are cumulative, meaning that if a report is submitted and another report created, the values from the previous report are added to the cumulative values. The cumulative value achieved is calculated as the sum of all the figures reported in all Project reports with the status submitted.

Project results

Result 1

Programme result indicator

RCR104_4.1: Solutions taken up or up-scaled by organisations

Measurement Unit solutions	Baseline	0,00	Delivery period
Target Value	Achieved in this reporting period	0,00	Cumulative value
1,00			0,00

Describe progress achieved

Attachment

Image 77. Project results section of the “Project results & Horizontal principles” tab



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Project managers can also upload an attachment per item which will show up again in the “Project report annexes” tab. In case multiple files should be uploaded per item, it is recommended to upload a zip or rar file.

For Horizontal principles there is a table to report on the contribution for each of the three cooperation criteria. The Type of contribution is pre-defined from the latest approved application form and cannot be changed. There is a text field to describe the contribution made in the respective reporting period.

Horizontal principles

Please indicate which type of contribution to horizontal principles applies to the project and justify your choice.

Cooperation criteria	Type of contribution	Description of contribution
Sustainable development	<input checked="" type="radio"/> positive effects <input type="radio"/> neutral <input type="radio"/> negative effects	Enter text here
Equal opportunities and non-discrimination	<input type="radio"/> positive effects <input checked="" type="radio"/> neutral <input type="radio"/> negative effects	Enter text here
Equality between men and women	<input type="radio"/> positive effects <input checked="" type="radio"/> neutral <input type="radio"/> negative effects	Enter text here

Image 78. Horizontal principles section of the “Project results & Horizontal principles” tab

3.4. “List of partner certificates” tab

In this tab, all partner certificates of the project are listed. A certificate can only be included in one project report. Once ticked, the certificate is unavailable in other project reports. Upon creation of a new project report, all available partner certificates, which are not yet included in any other project report, are included in the newly created project report. If the Project managers would not want to include a certificate in this project report, they should untick the respective partner certificates.

⚠ POINT OF ATTENTION:

- If control work of a Partner Report is certified when a Project Report is already created, they are added to the List of partner certificates unticked and can be manually included in the Project Report by ticking the tick box next to it.
- **In case a certified Partner Report included only a dummy expenditure, the Project manager must manually exclude this certificate by unticking the tick box next to it.**



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List of partner certificates

In this section you can find all partner certificates of this project. Please exclude the partner certificates you would not want to include in this project report. A partner report can only be included once. Once ticked, the certificate is unavailable in other reports.

	Partner	Partner Report	Date of certificate	Included in project report	Amount certificate (in Euro)
<input checked="" type="checkbox"/>	PP3	R.1	12/08/2023 10:01 AM	PR.1	14.000,00
<input checked="" type="checkbox"/>	LP1	R.2	12/04/2023 8:06 AM	PR.1	33.600,00
<input checked="" type="checkbox"/>	LP1	R.1	10/13/2023 12:44 PM	PR.1	41.580,00

Image 79. “List of partner certificates” tab – all certificates are included in the same Project Report

Partner certificates that have already been included in another Project Report are shown in the “List of partner certificates” tab in grey colour.

Dashboard / Applications / Project reports / Project report PR.4

Project report PR.4

Project report identification Work plan progress Project results & Horizontal prin... **List of partner certificates** Project report annexes

List of partner certificates

In this section you can find all partner certificates of this project. Please exclude the partner certificates you would not want to include in this project report. A partner report can only be included once. Once ticked, the certificate is unavailable in other reports.

	Partner	Partner Report	Date of certificate	Included in project report	Amount certificate (in Euro)
<input type="checkbox"/>	LP1	R.2	26.06.2023 12:28		58.400,00
<input checked="" type="checkbox"/>	PP3	R.1	26.06.2023 12:27	PR.4	1.800,00
<input checked="" type="checkbox"/>	PP2	R.1	26.06.2023 12:20	PR.3	15.000,00
<input checked="" type="checkbox"/>	PP3	R.2	26.06.2023 12:12	PR.3	108,00
<input checked="" type="checkbox"/>	LP1	R.4	16.06.2023 14:28	PR.3	0,00

Items per page: 25 1 - 5 of 5 < >

Not included in any PR.

Included in this PR.

Partner certificates included in another Project report.

Image 80. “List of partner certificates” tab - certificates are included in different Project Reports, or not included at all



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It is also indicated in which Project Report the certificate is included. Both in the “List of partner certificates” tab, as well as in the “Partner reports” overview table, as shown in two images below. Useful to know is that the Project Report number in the Partner reports overview table is clickable, which navigates you directly to the concerned Project Report.

List of partner certificates

In this section you can find all partner certificates of this project. Please exclude the partner certificates you would not want to include in this project report. A partner report can only be included once. Once ticked, the certificate is unavailable in other reports.

	Partner	Partner Report	Date of certificate	Included in project report	Amount certificate (in Euro)
<input checked="" type="checkbox"/>	PP3	R.1	12/08/2023 10:01 AM	PR.1	14.000,00
<input checked="" type="checkbox"/>	LP1	R.2	12/04/2023 8:06 AM	PR.1	33.600,00
<input checked="" type="checkbox"/>	LP1	R.1	10/13/2023 12:44 PM	PR.1	41.580,00

LP1

[+ Add Partner Report](#)

ID	Status	Included in project...	AF version linked	Reporting period
R.3	Draft		2.0	
R.2	Certified	<u>PR.1</u>	2.0	Period 2, month 7 - 12
R.1	Certified	<u>PR.1</u>	2.0	Period 1, month 1 - 6

Images 81. and 82. The same certificate shown in the “List of partner certificates” tab and “Partner reports” overview table



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3.5. “Project report annexes” tab

Similarly to Partner Reports, this section shows all files uploaded in the Project Report.

Project report PR.1

Project report identification Work plan progress Project results & Horizontal prin... List of partner certificates **Project report annexes** Financial overview Report exports

Project report annexes

Project report PR.1

- Work plan progress
- Project results & horizontal principles

File name	Location	Upload date ↓	User	File size	Description	Actions
2_2021-11-22_Small proj...	Project Report	12/08/2023 12:10 PM		470.2 kB		
1. Information Note on F...	Project Result	12/08/2023 12:10 PM		96.6 kB		
1_Advanced Capitalisati...	WorkPlan/Output	12/08/2023 12:05 PM		2.5 MB		

Items per page: 25 1 - 3 of 3

Image 83. “Project report annexes” tab

The tree structure represents the places within that report where files can be uploaded. **All uploads from all sections are shown in this list.** Project managers have the possibility to upload additional files linked to the Project Report here (by clicking the Upload file button).

Since it is not always possible to add descriptions to files in the dedicated sections (due to the chip style upload), users with edit right are also allowed to add descriptions to all files in this section.

⚠ POINT OF ATTENTION:

- Files uploaded in this section can be deleted here, other files can only be deleted in the section where they were uploaded.



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3.6. “Financial overview” tab

The financial overview tables show how the project is proceeding in terms of spending. The amounts included in the tables represent the aggregation of data from all Project reports submitted by the date when the current Project Report was created.

POINT OF ATTENTION:

- Beware that only the last Project Report created once all other Project reports were submitted has the most recent aggregated data (in case Project reports were not submitted in the same order they were created)!

The Project Report’s “Financial overview” tab comes with six different financial overview tables. For further details please see each table’s description below.

Project report PR.1

< Project report identification Work plan progress Project results & Horizontal prin... List of partner certificates Project report annexes **Financial overview** Report exports >

Financial overview
This values displayed below consist of certified amounts & fast track lump sums (if applicable) in Euro only.

Project expenditure - summary (in Euro)

	Project total eligible budget	Previously reported ⓘ	Current report	Total reported so far	% of total	Remaining budget ⓘ	Previously paid ⓘ
ERDF	596.070,67	0,00	71.344,00	71.344,00	11,97 %	524.726,67	0,00
Partner contribution ⓘ	149.017,67	0,00	17.836,00	17.836,00	11,97 %	131.181,67	N/A
↳ of which Public contribution	0,00	0,00	0,00	0,00		0,00	N/A
↳ of which Automatic public contribution	99.541,67	0,00	15.036,00	15.036,00	15,11 %	84.505,67	N/A
↳ of which Private contribution	49.476,00	0,00	2.800,00	2.800,00	5,66 %	46.676,00	N/A
Total	745.088,34	0,00	89.180,00	89.180,00	11,97 %	655.908,34	0,00

Image 84. “Financial overview” tab and its top overview table “Project Expenditure - summary (in Euro)”

Project Expenditure - summary (in Euro)

“Project Expenditure - summary (in Euro)” overview table shows the project budget - approved in application form, previously reported, current report, previously paid - divided per fund and contribution type (public/private/automatic public) and also shows some calculations using figures from the table.

“Previously reported” column sums up amounts from project reports previously submitted. “Remaining budget” column indicates the difference between Total reported so far and Partner total eligible budget from the application form. This value can become negative in case the reported expenditures exceed the budget in approved application form. “Previously paid” column indicates amounts related to funds paid by the programme. They will be added to this column in the next created report after payment is confirmed in the system.



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Project Expenditure - breakdown per cost category (in Euro)

“Project Expenditure - breakdown per cost category (in Euro)” overview table shows the project budget - approved in application form, previously reported and current report - split per cost category. The table behaves quite similarly to the other tables with similar columns.

⚠ POINT OF ATTENTION:

- Lump sums covering multiple cost categories always show up in their own separate row and are never added up in specific cost categories. Flat rates are not calculated on top of the Lump sums covering more than one cost category.

Project expenditure - breakdown per cost category (in Euro)

Cost category	Project total eligible budget	Previously reported ⁽ⁱ⁾	Current report	Total reported so far	% of total	Remaining budget
Staff costs	520.063,10	0,00	63.700,00	63.700,00	12,25 %	456.363,10
Office and administrative costs	0,00	0,00	0,00	0,00		0,00
Travel and accommodation	0,00	0,00	0,00	0,00		0,00
External expertise and services	0,00	0,00	0,00	0,00		0,00
Equipment	0,00	0,00	0,00	0,00		0,00
Infrastructure and works	0,00	0,00	0,00	0,00		0,00
Other costs	208.025,24	0,00	25.480,00	25.480,00	12,25 %	182.545,24
Lump sum	17.000,00	0,00	0,00	0,00	0,00 %	17.000,00
Total	745.088,34	0,00	89.180,00	89.180,00	11,97 %	655.908,34

Image 85. “Project Expenditure - breakdown per cost category (in Euro)” overview table

Project Expenditure - breakdown per investment (in Euro)

In this overview table all cost items linked to an investment are summed up. What is important to note is that no Simplified cost items are added up to this table, as they are automatically calculated on top. Only real costs linked to the investment in the List of expenditure are displayed in this overview table.

Project Expenditure - breakdown per Lump sum (in Euro)

This table shows the Lump sums. Lump sums declared in the Partner reports' lists of expenditures show up in the Current report column.



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Project expenditure - overview per partner/per cost category - Current report

This table shows the values per partner per cost category only from the Current report.

Project expenditure - overview per partner/per cost category - Current report

Partner	Organisation abbreviation	Country	Staff costs	Office and administration	Travel and accommodation	External expertise and	Equipment	Infrastructure and works	Other costs	Lump sum	Total current report
LP1		Italia (IT)	53.700,00	0,00	0,00	0,00	0,00	0,00	21.480,00 Flat Rate % 40	0,00	75.180,00
PP3		Hrvatska (HR)	10.000,00	0,00	0,00	0,00	0,00	0,00	4.000,00 Flat Rate % 40	0,00	14.000,00
Total			63.700,00	0,00	0,00	0,00	0,00	0,00	25.480,00	0,00	89.180,00

Image 86. “Project Expenditure - overview per partner/per cost category - Current report” overview table

Project expenditure - Summary of deducted items by control - Current report

This table sums up all deductions carried out by control per partner and type of error. These values are not cumulative but only related to the certificates included in this report.

Project expenditure - Summary of deducted items by control - Current report

Partner	Organisation abbreviation	Country	Staff costs	Office and administration	Travel and accommodation	External expertise and	Equipment	Infrastructure and works	Other costs	Lump sum	Total deduction
LP1		Italia (IT)	0,00	0,00	0,00	0,00	0,00	0,00	0,00 Flat Rate % 40	0,00	0,00
PP3		Hrvatska (HR)	0,00	0,00	0,00	0,00	0,00	0,00	0,00 Flat Rate % 40	0,00	0,00
Total			0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00	0,00

Image 87. “Project Expenditure - Summary of deducted items by control - Current report” overview table



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3.7. “Report exports” tab

In this tab, **in the future**, it will be possible to export the Project Report to a PDF file.

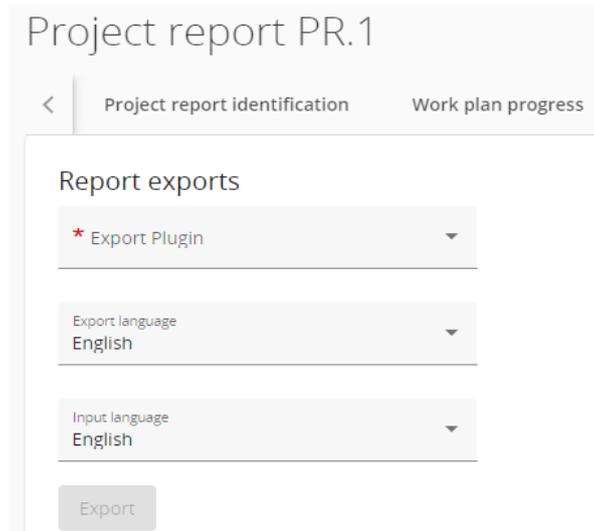


Image 88. “Report exports” tab

3.8. “Submit” tab

In this section the Project Report can be submitted. After submission, the Project Report is frozen, and the MA/JS verification can be started.

Submit

You are about to officially submit your Project report 1.

Make sure to submit your Project report in time as agreed with the programme. Please

 Also make sure that the contracting section is up-to-date before you submit.

Run pre-submission check



 Submit project report

Image 89. “Submit” tab

Before submission, Project manager must click on the “Run pre-submission check” button in order for the system to check the Project Report for possible errors and to, in case none were found, enable the button “Submit project report”.



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To finally submit the Project Report, Project manager must click on the “Submit project report” button. Once submitted, the status of the report changes, which is shown in the “Report identification” tab.

Project report identification Work plan progress Project results & Horizontal prin... List of partner certificates

Project progress report identification

Project ID and acronym	ITHR
Project report id	PR.1
Project report status	Draft → Submitted → Verified → Paid
Name of the organisation in original language	
Name of the organisation in english	
AF Version linked	2.0

Image 90. “Project report identification” tab showing the change in Status for Project Report

Change in the status of the report is also shown in the “Project reports” overview section, where also the submission date is logged.

Project reports

+ Add Project Report

ID	Status	AF Version linked	Reporting Period	Report Type	Date of report creation	Date of first submission
PR.1	Submitted	2.0	Period 1, month 1 - 6	Both	12/08/2023 8:16 AM	12/08/2023 12:51 PM

Image 91. Submission date logged in the “Project reports” overview table

