



Technical guidance online reporting

(version 3 as of 12 September 2016)

This guidance is meant to support **approved projects** at the stage of reporting. It contains key technical information on the operation and use of the electronic monitoring system (eMS) of Interreg Alpine Space. The reporting process is done via the eMS (partner reports to the lead partner, first level control and certification, project report). It is therefore highly recommended to read this document carefully before starting to report in the eMS. This technical guidance complements the guidance for project reports and the factsheet 4.7 which are available on the Interreg Alpine Space website.

Please be reminded that a lead partner (LP) is by nature a project partner (PP); therefore, where references are made to PP in this guidance, the relevant information also concerns the LP.

Preliminary steps

Technical information and system requirements

The eMS is a web application which can be accessed with recent versions of most common browsers (e.g. Internet Explorer 11, Firefox 46, Chrome 50)¹. The functionality of the system follows the common standards of web applications for entering and submitting data.

Access and registration

The eMS can be accessed at the following link <https://ems.alpine-space.eu>.

¹ When working with Internet Explorer, the option “display intranet sites in compatibility view” should be de-selected in the compatibility view settings of the browser (to access Internet Explorer preferences for compatibility view you can press Alt + T + B).



Already registered users should use their individual username and password. Not yet registered users should first of all register by applying the following steps.

Non-registered users: registration to eMS

From the eMS homepage, please click on “Register” and provide the requested set of credentials.

- **Username:** used to log in; please choose a username by which you can be clearly identified (e.g. a combination of first name and last name).
- **Email:** professional email address of the user. Please be aware that the same email address cannot be used for another username.
- **Password:** password used to access the eMS (in case the password is forgotten, please use the button “Forgot Password” on the front page of the eMS).
- **First name / Last name / Title:** personal information of the user.
- **Language:** English is pre-defined and cannot be changed; it is the official language of Interreg Alpine Space.

Following the registration, a confirmation email is automatically sent to the email address provided in the registration form. Only after confirmation, the partner will be able to log into the eMS.

Point of attention: By registering to/logging into the eMS, the user agrees to the terms and conditions of the eMS (and its updates, if any) which are published on the homepage of the system (<https://ems.alpine-space.eu>).

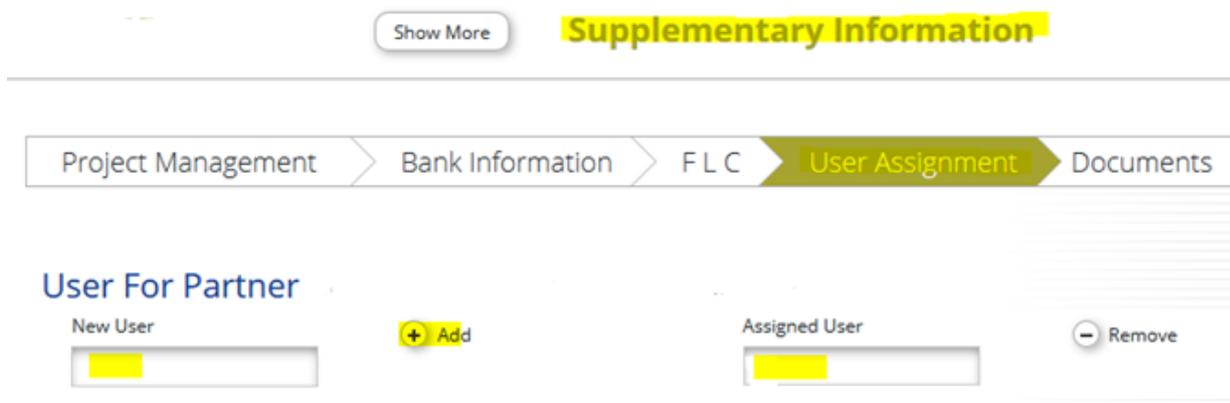
Note that the same user could be involved in more than one project; in this case, the same credentials (username and password) will be used for accessing the eMS.



Once registered to the eMS, PP should provide their username to the lead partner.

User assignment

The user assignment is done by the LP: it consists in matching a username to a specific project partner (the user must be registered to the eMS beforehand). To perform the user assignment: please select “Supplementary information” from the left menu and click on the tab “User assignment” (see screenshot below).



Once assigned to a project partner, the user gains access to the reporting sections.

General principles

The following important aspects have to be taken into account when filling in the reporting sections:

- Several users can access the eMS at the same time but please pay attention that the same section is only edited by one user at the time; if more users edit simultaneously the same section (including sub-sections) data might be lost.
- Always remember to save the data regularly and before leaving a section (“Save” button on upper left corner or at the bottom of a page); otherwise data will be lost (e.g. in case of interruptions of the internet connection or other technical issues).
- Do not use the “Enter” key of your keyboard to save data while filling the forms as it may create technical problems. Always use the commands provided by the eMS interface.



- Fields in the eMS have character limitations. When writing text for your report, it is recommended to use a plain text without any formatting. Text formatting reduces the number of available characters. Furthermore, copy-pasting from an outside source into the eMS (word document and other word processors) may result in additional characters.
- Please note that you can create a pdf file of your report at any time of its development by pressing the “Print report” button on the left menu. You will find the created pdf file(s) in the left menu in the section “Generated files”. Be aware that the saving of the pdf document in the file browser might take several minutes.

Reporting in the eMS: for all partners

Filling in the partner report

Create a partner report

To report its activities and expenditure, each PP has to create its own partner report.

By selecting its project in the eMS, the user will gain access to the reporting section. Click on "create a new report" to open a partner report (the LP will have to first select its role of “PP” in the scrolling menu on top of the page). Once the report has been created, the partner can enter and edit it.



The screenshot displays the 'Partner Reports' section for the '2 - Piemonte Region - RP'. A table lists several reports with the following columns: Report, Report Start, Report End, State, Date Of Partner Submission, Included In Project Report, Total Partner Expenditure Declared ERDF, and View Report. Below the table, there are two buttons: 'Create New Report' (circled in red) and 'Partner Living Tables'. The 'Project Messages' section at the bottom shows 'From 0', 'Subject 0', and 'Date' with a dropdown arrow, and a message that 'No records found'.



Points of attention:

1. If a partner report is in progress, it is not possible to create another one. The open partner report will have to be submitted to the FLC before a new partner report can be created.
2. During a request for modification, no partner report can be modified or created.
3. The first partner report created will always be connected to period 0 and preparation costs. Due to the nature of the lump sum and out of technical reasons, each PP is requested to report exactly what was planned in its AF budget for preparation costs and, if any, to also respect the same allocation per budget line, therefore:
 - **PP without budget in WP Preparation** should create a report for the period 0 and directly submit it without adding expenditure (in section “summary of partners work”, it is recommended to type “No preparation costs”). Once the partner report for period 0 is submitted, they will be able to create their partner report for the period 1.
 - **PP with budget in WP Preparation** should create their first partner report for period 0. In the list of expenditure, the box “add a lump sum” is to be ticked and the relevant amount allocated to the budget line as set in the AF.

Example 1:

In the AF, the total budget of PP1 for WP Preparation is 9,880€ and this is split into: 8,591.30€ in the budget line “staff costs” and a flat rate of 1,288.70€ for the budget line “office and administration”. In WP Preparation, PP1 should only enter the amount of 8,591.30€ in the budget line “staff costs”. The flat rate of 1,288.70€ for “office and administration” will be calculated automatically by the eMS. As a result, the total amount submitted in WP preparation for PP1 will be 9,880€.

Example 2:

In the AF, the total budget of PP2 for WP Preparation is 996.30€ and this is split into: 810€ in the budget line “travel and accommodation”, a flat rate for “office and administration” and an additional flat rate for “staff costs”. In WP Preparation, PP2 should only enter the amount of 810€ for “travel and accommodation”. The flat rates will be calculated automatically by the eMS. As a result, the total amount submitted in WP preparation for PP2 will be 996,30€.



Filling in/editing the partner report

The partner report is composed of 4 parts as presented below:

Partner Report > List Of Expenditures > Contribution And Forecast > Attachments

- **Partner report:** concerns the content part of the report (e.g. report on activities, outputs).
- **List of expenditures:** includes all expenditure items to be reported. Information included here will be automatically integrated in the financial tables of the partner report.
- **Contribution and forecast:** shows the current PP contribution (national co-financing) and the expected future expenditure.
- **Attachment:** no attachment is foreseen; please do not use this function.

Focus on partner report

This section provides an overview on the reporting per work package. It includes text boxes for the description of activities. Outputs and deliverables can be selected from drop-down menus.

Points of attention:

This section also displays aggregated figures on the level of expenditure per work package (see screen shot below). Due to technical reasons, this information might not be displayed correctly. As far as the figures included in the list of expenditure is correct, please disregard the information displayed in the work package section.

Reporting Per Work Package		Current Expenditure	Expenditure So Far
P Preparation (05.2014 - 12.2015)		€ 2,000.00	€ 0.00
Description Activities Contribution	Problems Description Justification		
<input type="text"/>	<input type="text"/>		
No Deliverables For This Work Package			



Focus on list of expenditure

To enter each expenditure item, please tick on "add a real cost" or "add a lump sum".



List Of Expenditure

Options	Seq No ↕	Budget Line ↕	Wp ↕
No Match Found			
<input type="button" value="Export"/> <input type="button" value="Save Columns"/> <input type="button" value="Columns"/>			
<input type="button" value="+ Add Real Cost"/> <input type="button" value="+ Add Lump Sum"/>			

The following window for expenditure will appear:

Edit Expenditure

<p>Budgetline</p> <p>Workpackage</p> <p>Internal Reference Number</p> <p>Invoice Number</p> <p>Invoice Date</p> <p>Date Of Payment</p> <p>Currency</p> <p>Total Value Of Item In Original Currency</p> <p>Vat</p> <p>Declared Amount In The Original Currency</p> <p>Expenditure Outside (The Union Part Of) The Programme Area?</p> <p>In Kind</p>	<p>...</p> <p>...</p> <p></p> <p></p> <p></p> <p></p> <p>EUR - EURO</p> <p></p> <p></p> <p><input type="checkbox"/></p> <p><input type="checkbox"/></p>	<p>Description1</p> <p>255 Characters remaining</p> <p>Description2</p> <p>255 Characters remaining</p> <p>Partner Comment</p> <p>255 Characters remaining</p>
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------

The PP should fill in all relevant fields and click "add". Each expenditure item shall be added and the relevant information inserted.

To be noted:

- No upload is foreseen on the eMS. Therefore the invoices should be transferred to the FLC by other means (e.g. normal post or e-mail).
- In kind: this should never be ticked. In kind expenses are not foreseen in the programme.
- VAT should be inserted if the partner recovers VAT. The amount inserted under "declared amount in



- the original currency” shall then already be reduced by the VAT.
- Exchange rate: the eMS uses automatically the exchange rate for the given original currency when the partner report is submitted to the FLC.
 - Flat rates: for WP Management, WP Communication and WP Implementation, the flat rates are automatically generated and allocated by the system in the relevant WP.

Focus on contribution and forecast

In the section “Report forecast” the PP should report the expenditure it plans to report for the next report. It could deviate from the planned budget per period in the AF as it should be realistic to help the LP to consider adaptive measures if needed.

Section “Follow-up of partner contribution”: it displays the “target partner contribution value” for the partner report. This amount has to be entered in the column “current report” and split among the different contributions (e.g. public and private, or several public contributions). If needed, a new contribution to the project which was not foreseen in the AF can be added. The total of the amount in the column “current report” should equal the “target partner contribution value”.

Please be aware that the partner contribution has to be specified for each partner report (regardless whether this was already received or not).

Partner Report
List Of Expenditure
Contribution And Forecast
Attachments

Report Forecast

Estimated Expenditure

€ 0.00

Description

255 Characters remaining

Follow-up Of Partner Contribution

Target Partner Contribution Value

€ 3,817.80

Legal Status	Total Amount Indicated In The Application Form	% Of Total(According To A F)	Previously Reported	Current Report	Total Reported So Far	Percentage Of Total Report
public	€ 0.00	0.00 %	€ 726.00	€ 0.00	€ 726.00	1
public	€ 57,207.00	100.00 %	€ 0.00	€ 3,817.80	€ 3,817.80	8
	€ 57,207.00	100.00 %	€ 726.00	€ 3,817.80	€ 4,543.80	10
	€ 0.00	0.00 %	€ 0.00	€ 0.00	€ 0.00	
	€ 57,207.00	100.00 %	€ 726.00	€ 3,817.80	€ 4,543.80	10

Export + Add Contribution



Submission of the partner report to the FLC

Once all these steps are done, the partner can tick the "check saved report" button.



The screenshot shows a web interface with a left-hand navigation menu and a main content area. In the menu, the 'Check Saved Report' option is highlighted with a yellow background. The main content area displays a breadcrumb trail 'Partner Report > List Of Expenditur', a title 'Partner Report', and a section for 'Period 1 - 16.12.2015 - 30.06.2016'. Below this, there are input fields for 'Start Date' (16.12.2015) and 'End Date' (30.06.2016), and a section titled 'Summary Of Partners Work'.

Use this opportunity to go through your report to verify that all necessary fields are completed and properly filled in. Please be aware that this button does not check if the relevant information is provided. It will only check if the partner contribution is matching its target value. It remains the responsibility of each partner to make sure that all fields are properly filled in.

Once checked and saved, a message of success will appear on the right up corner. The "Submit report" button will appear on the left menu. To submit your partner report, press the "Submit report" button. Be aware that once submitted the information in the partner report cannot be changed any longer. You can save the final version as a pdf file.



This screenshot is similar to the previous one, but the 'Submit Report' option in the left-hand navigation menu is highlighted with a yellow background. The main content area remains the same, showing the 'Partner Report' details for the period 16.12.2015 to 30.06.2016.

With clicking the "submit report" button the partner report is electronically sent to the FLC.



Reporting in the eMS: only for the lead partner

Filling in the project reports

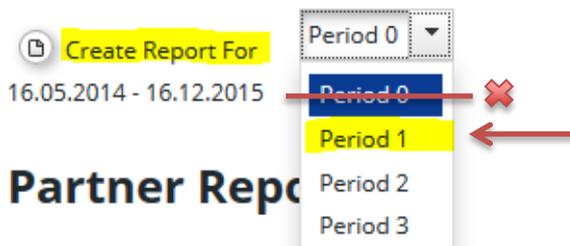
The LP compiles the information of all partner reports in the project report, which will be submitted to the JS. To do so the LP of the project should first select its role as LP (see screenshot below).



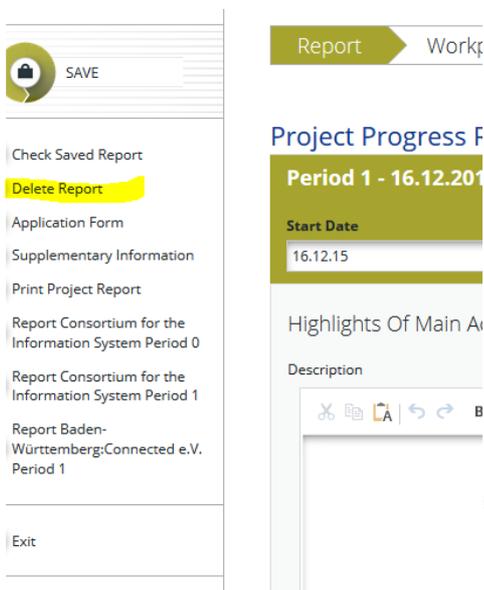
Create a project report

To create a project report (status report or progress report) please tick on “create report for” (see screenshot below) and select the period of the report to be submitted.

The first project report to be created is for period 1 (period 0 is only relevant at partner level, for the partner report, and not for the joint project report).



If you have accidentally created a project report for period 0, please remove it by using the delete function on the left menu.





Only one project report can be created and worked on at a time. If a report is still open (in progress), a new one cannot be created; you will have to first finalise one report and then create the following one.

Filling in/editing the project report

The project report is composed of 5 sections:



A – Report

This section provides an overview of the project report: the “Summary of partners’ work” is a free text box which has to be filled in by the LP directly in this section (all information connected to the work packages (WP) has to be filled in the relevant WP section and will then be displayed in the overview section “Report”). For details on the expected content of the report (for the status report and the progress report), please refer to the factsheet 4.7 and guidance on project reporting.

To include partner certificates in the project report, the LP should select them (by ticking the respective buttons) in this section.

B – Work packages

To fill in this section, please select the relevant WP from tab “Workpackages”.



C – Certificates

Details of certificates are accessible in this section. All certificates selected in part A will appear as a drop down list under the tab “Certificates”. The desired certificate can be selected.



Report > Workpackages > **Certificates** > Project Report Tables > /

Project Progress Report

- Certificate 1
- Certificate 2

With selecting a certificate, the list of expenditure connected to it will appear. Each expenditure item can be opened, the list can also be exported in excel. The LP can see if the FLC amended any item and/or included any comment.

FLC	Verified By FLC	<input checked="" type="checkbox"/>	Comment FLC
	Difference FLC	€ 20.00	wrong calculation - I added 20
	Amount Certified FLC	€ 9,960.00	225 Characters remaining
	Difference L P	€ 0.00	Comment L P
LP	Amount Certified L P	€ 9,960.00	255 Characters remaining

Uploads Save

The LP can also comment the item, but cannot modify the certified amount. It can however decide to revert the partner report to the FLC or to the partner if corrections are needed.

List Of Partner Flc Certificates

included	Co-financing Source	Co-financing Rate(%)	Total Partner E R D F Included	Total Partner Non- E R D F Included	FLC certificate	Revert
	ERDF	85.00 %				
1,550.00	ERDF	85.00 %	€ 1,317.50	€ 0.00		
	ERDF	85.00 %				

D - Project report tables

In this section, several tables are displayed. All data will be automatically transferred from the partner reports and certificates. If wished, these can be extracted by clicking on “Export” as shown below:



Project Report

Programme Co-financing	Pro
Total Co-financing	
Of Which ERDF	
Of Which Non-ERDF	
Partner Contribution	
Total Eligible Expenditure	
Export	

E- Attachments: no attachment is foreseen. Please do not use this function.

Submission of the project report to the JS

The same steps for submitting a project report to the JS apply for both the status report and the progress report.

Before submitting your report, please click first on the button "Check saved report" (see screenshot of project menu below).

Use this opportunity to go through your report to verify that all necessary fields are completed and properly filled in. Please be aware that this button does not check if the relevant information is provided. It remains the responsibility of each LP to make sure that all necessary fields are properly filled in.

Once checked and saved, a message of success will appear on the right up corner. The "Submit report" button will appear on the left menu. To submit the project report, press the "Submit report" button; a small window asking if you are sure will appear. Once confirmed, the project report will be sent to the JS (no confirmation email will be sent); the project report will be frozen and cannot be edited any longer. The status of the project report is turned into "Submitted". You can save the final version as a pdf file.



SAVE

- Submit Report
- Application Form
- Supplementary Information
- Print Project Report

Report > Workpackages > Cer

Project Progress Report

Period 0 - 16.05.2014 - 16.12.2015

Start Date	End D
16.05.14	16.12

Technical support

For any problems you might experience with the eMS, please contact the JS at js@alpine-space.eu or call at + 49 (0) 89 92 14 18 00 during working hours.