# Evolving FIRE into a 5G-Oriented Experimental Playground for Vertical Industries

## D 1.1 Project Management Handbook

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## Disclaimer



## Impressum

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## Copyright notice

# Executive Summary

*This Management Handbook is a practical guideline to facilitate the management of the project for all 5GinFIRE participants. It sets down and explains all contractual rules and management procedures. It also provides useful advices and management tools, which will help project participants to do what is required in due form and in due time. It has been prepared by EURESCOM.*

# List of Authors

| Organisation | Authors | Main organisations' contributions |
|---|---|---|
| EURESCOM | Halid Hrasnica | |

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# Abbreviations

CA - Consortium Agreement

EB - Executive Board

EC - European Commission

GA - General Assembly

PC - Project Coordinator

PCC - Project Coordination Committee

PIC - Project Implementation Committee

STPM - Scientific and Technical Project Manager

WP - Work Package

# 1 WHERE TO GET ALL THE INFORMATION

## 1.1 Document Repository

The project will setup a collaborative workspace based on ONLYOFFICE (http://www.onlyoffice.com/about.aspx) system. The link to the document repository will be distributed to the partners together with invitations to individual project participants to join the repository. New accounts for the project partners will be created as needed, including re-arrangement of the existing repository users, which can be requested by contacting the project coordinator at any time. The document repository is only accessible with password.

The document will include the following sections:

- Contractual documents – Grant Agreement, Consortium Agreement, etc.
- Resources – actual information on usage of the resources
- Deliverables – completed, submitted, reviewed
- WP and task work spaces – to share and work collaboratively on respective documents, draft deliverables, concept papers, etc.
- Dissemination – to store and work together on dissemination items
- Templates – to include deliverable and presentation templates, project and partners' logos, etc.
- Meetings – with agendas and minutes from physical meetings, notes from audio conferences, action points agreed, etc.

The document repository structure will be extended as needed by the project consortium and individual partners for their work in the project as well as to serve as file sharing platform among the consortium members.

# 2 5GINFIRE MANAGEMENT STRUCTURE AND PROCEDURES

A collaborative project requires efficient and flexible management procedures as well as a well-structured project organisation, to ensure division of responsibilities among the partners as required by the project, precisely defined decision making and self-assessment processes, proper information flow within the consortium, and communication towards the EC and the wider public. The project management structure and procedures, described in details below, will be implemented in the scope of WP1, providing necessary resources for all related activities.

## 2.1 Project organisation

The project **Consortium Agreement (CA),** signed by all project partners at the beginning of the project, formally defines the project governance, including rights and responsibilities of consortium members, working procedures of the project bodies and responsible individuals, as well as the project management procedures.

In order to reduce unnecessary management overhead, the 5GinFIRE project management implements a simple structure, where all discussions and related decisions are made at plenary level by achieving consensus among all project partners. However, for the cases where formal project decisions are necessary, in accordance with the Consortium Agreement and H2020 rules, the project established **a Project Coordination Committee (PCC)**, referring to **General Assembly (GA)** in the CA, as the highest decision making project body and a **Project Implementation Committee (PIC)**, referring to **Executive Board (EB)** in the CA, as sub-set of the PCC, which is responsible for implementing and overseeing the project plan, as well as coordinating the technical work among the work packages. Table 1 presents the main activities and responsibilities of the project bodies.

The main responsibilities in the execution of the project coordination and management activities as well as project representation at large will be assumed by the **Project Coordinator (PC)** and the **Scientific and Technical Project Manager (STPM)**.

- The PC is an intermediary between European Commission and the 5GinFIRE project consortium, is in charge of general public project representation, and is responsible for project controlling; delivery of the project results, reporting, handling the payments and accounts, and correct application of EC rules. The PC is in charge of the overall coordination project activities, ensuring that appropriate technical project outputs are being generated, milestones reached, deliverables timely produced, and also monitors external activities and events, which may have impact on the project, providing respective information to the consortium for further discussion.
- The Scientific and Technical Project Manager (STPM) is responsible for the overall technical project management and coordination within and between work packages, and leads all related discussions and activities within the Project Implementation Committee, including overall scientific and technical quality assurance. The STPM is

also first PC deputy for all non-administrative issues and project representation, including overseeing the overall project dissemination activities.

**Table 1: 5GinFIRE project bodies**

| |
|---|
| **Project Coordination Committee (PCC)**<br>Takes final decisions on the overall policy of the consortium, modifications or extensions of the Consortium Agreement or project objectives, and all project related financial issues.<br>Meets annually or on request from its members and is chaired by Project Coordinator. Voting procedure will be specified in Consortium Agreement. |
| **Project Implementation Committee (PIC)**, with typical working items, such as:<br>• Definition of a comprehensive and attainable strategy for completion of project objectives,<br>• Approval of project deliverables, and implementation of peer-review procedures if required,<br>• Assurance of technical consistency and maximum synergy between WP's,<br>• Creation of ad-hoc projects working groups if necessary,<br>• Self-assessment and definition of corresponding corrective actions, and<br>• First level of conflict resolution<br>Meets regularly 3-4 times per year and works continuously between the meetings. Co-chaired by Project Coordinator and Scientific and Technical Project Manager in accordance with their responsibilities, specified below. Decisions are taken by consensus or, if it is not possible, by qualified majority (two thirds), where all members have one vote. If the decision cannot be taken, the issue will be considered by the PCC. |
| **IPR (Intellectual Property Rights) Board can be created by the PCC, if necessary**, to assess all IPR relevant information that was brought or developed in the project and, based on the IPR ownership, gives recommendations on definition of access rights and use of results including licencing. |
| **Project work on the Work Package (WP) level** will be done by all project partners involved in the WP and will be coordinated by respective WP leaders. Decisions on the WP level are made by consensus and if not possible by qualified majority principle (two thirds), where each WP partner has one vote. |
| **Work on the Task level** is organised in the same way as at the WP level under coordination of respective Task leaders together with editors of particular project deliverables. |

A **data base** of partners' representatives and their deputies in the project bodies (PCC, PIC), WP, task, and activity leaders, as well as names of PC and STPM is provided in the project repository and will be updated as appropriate during the project life time. Furthermore, the data base includes organizations' responsible for administrative and financial issues (reporting) as well as a directory to include contacts and main responsibilities of all persons directly involved in the project work.

## 2.2 Project meetings

Project meetings will be mainly held as plenary meeting events, accommodating meetings of various project bodies at different levels, in order to efficiently use time and resources. Meeting will be organised three to four times per year in accordance with the actual project needs. If necessary, individual meetings of groups (e.g. WP meetings) will be organised.

These meetings are planned and scheduled in advance, mostly coinciding with crucial points within the project flow. These can be either at critical decision points in the project or preparation meetings in advance of the project review meetings. These meetings cover the whole consortium and the whole project and will provide time to exchange administrative information as well as inter- and intra- work package related technical issues.

A long term plan of plenary meetings will be made early in the project and communicated to all partners. All partners are required to attend plenary meetings. Per partner one or more people can attend, depending on the involvement in the tasks and activities discussed at the meeting.

Minutes of the meeting are prepared within 15 days. Project Coordinator is responsible for compiling the entire meeting minutes and recording general, project level, discussions and decisions, including these from PCC and PIC (supported by STPM), whereas the WP leaders are responsible to provide minutes on the respective WP meetings. The minutes of the meetings will be distributed and made available in the repository.

To ensure continuity of the project activities, audio conferences will be organised at all levels as appropriate (suggested timing twice per month) depending on the current level of activities.

## 2.3 Management Procedures

### 2.3.1 Conflict resolution

The basic rule on making the project decisions is to achieve consensus among all involved project partners at all levels, where alternatively the defined voting principles can be applied if required. Nevertheless, it is possible that partners cannot always agree on particular matters, when a procedure for conflict resolution has to be applied. In principle, the conflict resolution will be carried out from lower to higher project levels (e.g. from task to WP level, from WP level to the project level – PIC and PCC), where the respective leading personalities will act as mediators. In the case of particular difficulties in solving a conflict, a dedicated working group will be set up by the PCC, in order to propose a solution. Any conflicts that cannot be resolved through these principles will be handled according to the dispute resolution defined in the Consortium Agreement.

### 2.3.2 Self-assessment / internal project review

Project self-assessment and review of the project planning, including fine work plan for the upcoming six months, will be regularly carried out by the PIC and discussed at every plenary project meeting, starting from the project kick-off, with all consortium members. Schedule of the self-assessment cycles will be chosen in accordance with the project plan and timing of the main project milestones, but the assessments should be performed at least twice per year. Work done within WPs and tasks is continuously monitored and particularly checked during the self-assessment cycles by the PIC. If necessary, the PIC will act, usually in cooperation with the work packages and tasks, by proposing necessary corrective actions and implementing respective changes in the project plan. The PCC will be consulted or directly involved in these activities, depending on nature and level of the needed work plan corrections.

Monitoring of all project activities, as a base for the self-assessment, is carried out in accordance with widely adopted iterative PDCA (Plan-Do-Check-Act) principle by considering all relevant project specifics and particularities of collaborative EU projects (Figure 1). The project controlling is carried out by considering various internal project factors, such as status of particular project deliverables and milestones, work progress in general, status of the project resources. On the other hand, important impacts on the project could be caused by various external factors (e.g. changes in project relevant market and research areas), which will be also regularly observed by the Project Coordinator, and the PIC, in particular the Scientific and Technical Project Manager. If necessary, respective corrective actions can be proposed and implemented in accordance with the same principles.

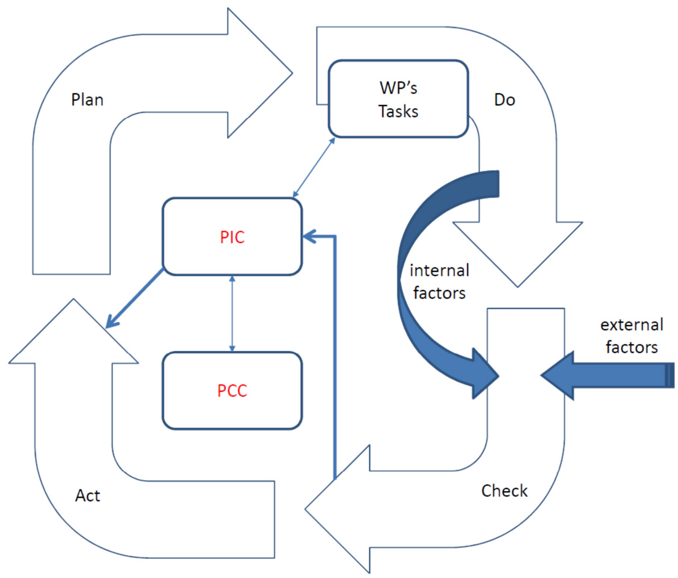



**Figure 1: PDCA based project monitoring**

### 2.3.3 Risk management

The project management approach presented above provides mechanisms to identify and resolve various potential project risks, which can be considered as particular internal or external factors, ensuring efficient implementation of needed corrective actions. Even it is not possible to predict all possible risks, it is advisable to identify and assess a set of potential risks (see table below) related to the project, so that the consortium is ready to quickly react and immediately perform corrective activities if required. The identified risks will be regularly reviewed in the scope of the self-assessment activities and internal project reviews, described above.

**Table 2: Critical risks for implementation**

| Description of risk<br><br>**Consortium and management related risks** | WP(s) involved | Proposed risk-mitigation measures |
|---|---|---|
| **Partners related risks** – underperforming, leaving the project, key-personnel temporally not available | WP1 | The flexible project management structure and Consortium Agreement allow a quick shift of resources to alternative project partners and allows quick inclusion of new partners in the consortium if necessary. Consortium partners are involved in the related areas with more than one staff member, ensuring an immediate substitution. |
| **Planning problems** – resources underestimated, project timing not appropriate, deliverables/milestones delayed. | WP1 | The potential solutions are involvement of other partners with available resources if possible, rearrangement of resources among partners, change of the project plan within the self-assessment activities and EC if needed, and ensuring timely implementation of corrective actions. |
| **Collaboration issues** – consortium cannot agree, WP interaction not satisfactory, coordination not efficient | WP1 | The project management provides appropriate decision making and conflict resolution procedures which should be applied. As last instance, managements of the affected organisations, including the coordinating organisation, will be involved in resolution. |
| **External risks** – change of the project requirements due to evolution to relevant technology and market landscape | WP1 | The PIC will immediately analyse concrete impact on the project and propose corrective actions in the work plan. |

### 2.3.4 Handling of deliverables

**Project deliverables** will be first agreed on respective task and WP levels and afterwards approved by the PCI and/or PCC, which could involve further internal deliverable reviewers if appropriate, before submission to the EC. Respective task and WP leaders including deliverable editors are responsible for quality and completeness of the deliverables. **Other project publications** (e.g. papers for conferences) can be initiated by any consortium member. After agreement by the Project Board a respective Task Group (e.g. group of authors), can be created to finalise the publication, which should be then approved in accordance with the rules defined in the Consortium Agreement.

The detailed deliverable review process is presented in Figure 2. Accordingly, the review process will start latest three weeks before submission deadline of the respective deliverable. However, in order to ensure more efficient review process and correction of the deliverables in early stage of their creation, the reviewers will be continuously informed about status of the deliverables they are responsible for, so that related principle comments can already be made at this stage and corresponding corrective actions can be performed.

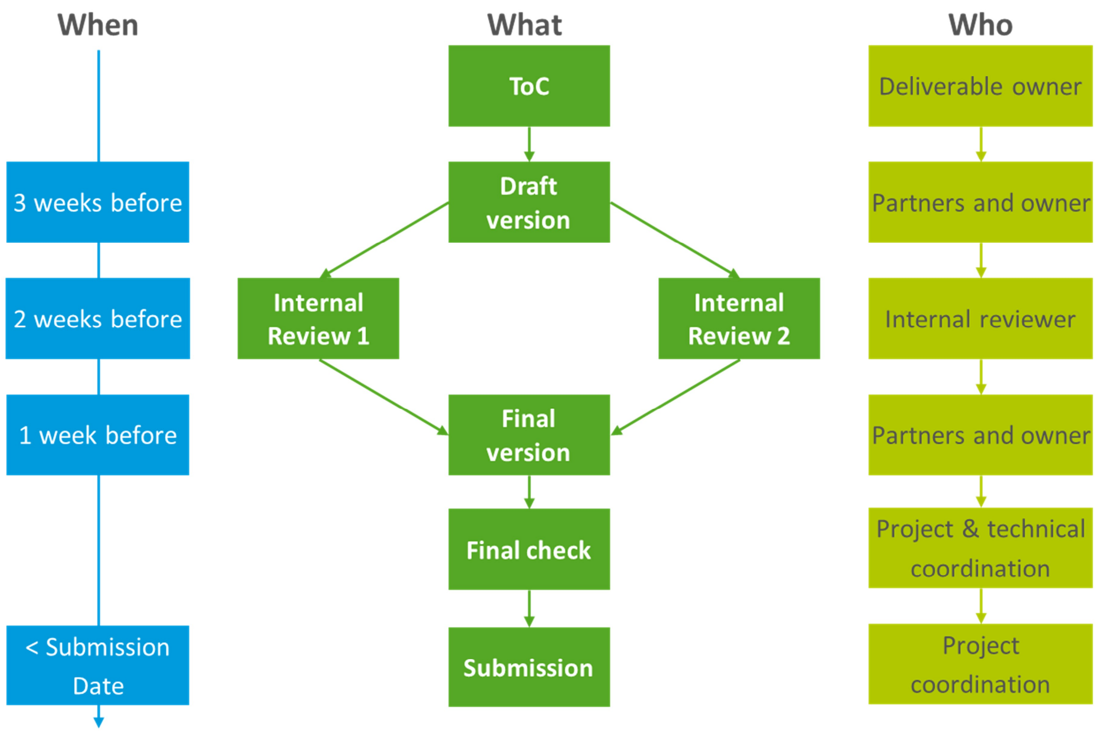



**Figure 2: Deliverable review process**

In the document repository, a list of agreed deliverable reviewers will be stored and, of course, updated later on as appropriate.

### 2.3.5 How to write a deliverable?

The deliverable is the official document containing the results of the respective activities and tasks in the project. This document, or whatever the required format will be, is to be submitted to the EC and to the reviewers. A template for the deliverables is provided in the repository. The use of this template is mandatory for any Deliverable of type “Report”.

**Things to do by the contributing partners:**

Contributing partners are expected to provide their contributions in the agreed format with the agreed content by the agreed deadline. In case they experience a delay, or cannot provide the expected and agreed content, they should flag this to the responsible editor immediately. The contributing partners are also in charge of revising their contributions according to the comments made in the project-internal review.

**Things to do by the Responsible Partner:**

The responsible partner should appoint a responsible person as editor of the deliverable.

The responsible editor should organise the deliverable production process. The editor should propose an initial table of content and suggest distribution of contributions among partners, organise the discussion and agreement process concerning the overall scope of the document and its structure, the scope of the individual contributions expected and their schedule. The editor is responsible for keeping the timeline of the production. If there is any delay, the editor should immediately notify the respective WP leader and project coordinator. The editor is also responsible to ensure that the deliverable is produced in the agreed format adhering to the template specified by the project.

In particular, the editor is responsible to ensure that the list of authors correctly captures all partners and individuals who contributed to the deliverable.

Having the deliverable completed the responsible editor releases the deliverable to the WP leader.

**Things to do by the WP-leader:**

The WP leader is responsible for monitoring and ensuring that the deliverable production process gets started, and overseeing its production. In case a deliverable needs to be co-ordinated with other deliverables (within the same WP or across different WPs) the WP leader should take an active role in ensuring the necessary co-ordination.

In case of delays the WP leader is responsible to co-ordinate a re-schedule in agreement with the editor, the co-ordinator and project management board.

Having received the deliverable from the responsible editor the WP leader checks its quality and that it meets the expectations and contractual commitments.

**Things to do by the reviewer:**

The reviewer serves as the ultimate, final checkpoint of the deliverable, both content wise and also regarding its format.

The reviewer should be available for a limited short time, just before the actual submission to check and review the deliverable. The reviewer should review the deliverable without delay. The reviewer(s) should check that the deliverable meets all contractual obligations and technical expectations, also in the context of the project as a whole. In case the review discovers any formal, or editorial issues or deficiencies regarding the content, it should immediately notify both the WP leader and the responsible editor to seek an improvement, fixing.

**Things to do by the PC**

The coordinator verifies the format of the deliverable and submits it to EC. The coordinator is the only contact with the EC regarding the submission of deliverables. All deliverables pass through the coordinator.

# 3 COMMUNICATION

## 3.1 Physical delivery of documents when necessary

Eurescom GmbH
To the attention of 5GinFIRE project
Wieblinger Weg 19/4
69123 Heidelberg
Germany

Note that all communication with EC and Project Officer, physical and electronic, is handled by the Project Coordinator.

## 3.2 Mailing lists

All 5GinFIRE mailing lists are established in the “5GinFIRE.eu” domain. For the time being, there are the following lists established:

- participants@5GinFIRE.eu – where all persons involved in the project work are included and where further persons will be included on request from the respective project partners’ organisations – for the time being, it is the main project communication channel.
- coordinator@5GinFIRE.eu – the list includes staff from Eurescom (the Project Coordinator organisation) involved in the project and should be used for all kind of request to the coordinator by project partners, in order to ensure as fast as possible response and feedback
- AdminFinanc@5GinFIRE.eu – used for negotiations of the Consortium Agreement with partners legal representatives included, and will be used in the future for similar purposes, such as reporting and provision of financial statements (C-forms)
- For dissemination purposes, a contact@5GinFIRE.eu list will be established as first project contact point for wide public and linked on the project website.

The mailing lists will be updated regularly, including creation of new lists as required.

The mailing lists are maintained within Eurescom Management tool package “Eures Tools” and can be accessed through the following link http://lists.eurescom.eu. To be able to use all features of the used mailing list server, the participant will have to register once and create an account page.

Request for subscription to e- mail lists and their creation should be sent at coordinator@5GinFIRE.eu.

## 3.3 Audio bridge

The 5GinFIRE project uses WebEx audio-video conferencing system, but is not restricted to it and will use further tools as needed and as convenient. The connection details for the audio-video calls will always be distributed within invitations to the remoter meetings.

# 4 REPORTING

Besides the project periodic reports to the EC, as defined in WP1, the project will provide quarterly activity reports to the Project Officer. The activity reports will not include information on resources and expenditures, if not formally requested by EC.

## 4.1 Tool for quarterly reporting

The reporting will be organised through an inline project reporting tool, part of EuresTools, which can be accessed at https://ws.eurescom.eu. To be able to access the reporting tools, all project partners will receive separate accounts.

The reporting will be required on quarterly base – every three months – latest two weeks after end of the period/quarter. The Work Summary Form, corresponding to a quarterly report is divided in four parts:

- **Part I:** In this part the performed activities and produced results shall be listed as short text statements for each WP the reporting organisation is involved.
- **Part II:** For each involved WP the worked effort in person months (PM) shall be indicated as total figures of all people working in that WP. Additionally a specification of the people and individual efforts shall be given, if appropriate.
- **Part III:** In this part an assessment of the current project situation is requested. In case of problems a yellow flag, for serious problems a red flag should be marked.
- **Part IV:** In this part all expenditures for travel and further expenditures such as subcontracts, equipment, and other costs shall be entered – direct costs only (without overhead – indirect costs).

After completing the form it can be submitted by pressing the Submit button. In case the form cannot be completed in the session it can be saved as private draft and opened later for continuation and completion. The cancel button resets the whole reporting process and the clear form button resets the form and deletes all information already entered.

Detailed information on the reporting tool is attached to this document (Annex B).

## 4.2 Periodic reporting to the EC

The 5GinFIRE Grant Agreement defines the following two reporting periods to the EC:

- After project month 12 (M12) and
- After project end (M36)

The periodic reports will be prepared by the Project Coordinator in accordance with corresponding EC rules/templates and requirements from the Project Officer. Mandatory contributions to the periodic reports are expected from all partners, in particular from WP and Task leaders.

The periodic reports also include costs statements (C forms) from all partners for the reporting period, which are prepared and submitted individually by the consortium members through the respective EC submission system.

The periodic report include project review meeting, for the corresponding period, organised by EC, where all project partners are expected to attend and contribute.

## 4.3 Reporting on Milestones

Milestones are checkpoints during the course of the project and they have been introduced to check the status of progress of the project. In some cases these milestones also define crucial decision points in the project activities.

For each milestone, STPM has to write a short report to describe the explanation of requirements, challenges, solutions to reach the milestone and decisions taken. When the milestone is reached, the PIC confirms it and the Project Coordinator submits the milestone report to the European Commission as proof of the milestone achievement.

# ANNEX A EURESTOOLS® MAIL-LIST MANUAL

This manual explains, how to use the EuresTools® Mail-List interface at http://lists.eurescom.eu

Note: If you are already a member on a EuresTools mailing list, but have never logged into the system, please start reading the section “Obtaining your password”.

**Creating an account**

Open http://lists.eurescom.eu in your web browser. Since you are not registered on the system yet, you will get the "anonymous user" view.

Now click the "Create Account" button in the upper left corner. On the following page, enter your email address and select a password to use with the mailing list system.

Optionally, you can enter your first and last name, as well as your Organization (Company) name.

When finished, click the "Create Account" button. The system will now send a confirmation message to the email address you entered. It contains a confirmation code that you must enter on the next page to complete the registration process. This is required to prevent typos in the email address, as well as fake registrations.

If the confirmation message does not arrive right away, you can also complete the registration later by clicking a hyperlink in the confirmation message.

After completing the registration, you will see the "Login" page.

**Obtaining your password**

If you are already a member on a list, an account has been created for you by the list maintainer. In this case, you can retrieve your password by going to the "Login" page (button in the upper left corner), entering your email address only, and clicking the "Get password" button below. An email will be send to your address, containing the password. You can then log into the system.

**Logging in**

You can log into the system on the "Login" page (button in the upper left corner). Enter your email address and your password. It is recommended to leave the "Remember my login" option checked since it is required for viewing list archives.

**Subscribing/unsubscribing and finding lists**

When you are logged in, the list listing contains an additional column ("Subscription") for managing your subscriptions. If your current status is "unsubscribed" printed on orange, you can subscribe to the list by clicking into the "Subscription" column. If the subscription requires approval by the list administrator, your status will show as "pending". Otherwise, you will be subscribed right away. If the subscription status is "unsubscribed" and printed in black, only the list administrator can add you to the list. If you only want to see lists where you are currently subscribed, check the "Subscribed only" checkbox in the table header. To find a specific list, enter a part of its name or domain in the "Filter" textbox and click "Set".

**Managing lists as an owner**

When you are the owner of one or multiple lists, you can manage the list, meaning you can subscribe and unsubscribe members, set list properties, appoint co-moderators and manage existing member's information. You will also receive email notifications about new pending subscription and new list members. When you have logged into the list interface, check the "Owned only" box in the upper right corner of the table. You will then only see the lists on which you are the owner. To the left of each list entry, you will see four columns with a single character in them:

*A - Add members or edit the list members in text mode.*

*P - Edit the list properties.*

*M - Manage existing list members.*

*C - Add co-moderators or edit the co-moderator list in text mode.*

Each of these options will lead you to a new page. All of these pages have a help text, either visible right away, or as pop-ups that appear when you hover with the mouse-over a question-mark ('?'). When you receive "pending" subscription notifications, go to the "M" (manage members) page, and check the "Pending only" box in the upper right corner. You will then only see members in "pending" status. To add them to the list, check their boxes on the left side and select the "accept pending subscriptions" option in the drop-down menu at the bottom of the table. The rightmost column shows the usage statistics of the lists. The number behind "P:" indicates the number of postings sent to the list. The number behind "S:" shows how many individual recipients received an email. The number behind "B:" shows how many "Bounces" occurred. A bounce occurs if a mail cannot be delivered to a recipient, usually because of an incorrect email address. The next line shows the total number of kilobytes transferred by the list and the last line indicates since when the statistics are measured for that list.

**Further information**

Visit http://www.eurescom.eu/EuresTools/CommunicationManagement/maillist.asp to learn more about the features of our mailing-list tool.

**Contact**

If you have questions, please send an e-mail to services@eurescom.eu.

# ANNEX B EURESTOOLS® REPORTER

## Access and Main Menus

The reporting tool is accessible at the link: https://ws.eurescom.eu

The tool opens with the following log-in page:


The user name and the password are individually assigned to each partner in a project. Depending on the function in the project (e.g. project coordinator, work-package leader, or project partner) your account may show different functions to access.

After successful log-in the Main Menu is visible. The Main Menu shows all underlying submenus as also shown in the left menu bar:


**Submit work summary**

This is the most important submenu and it serves for selecting the reporting period and work packages. It is used by all project partners to report their working results of the selected period.

Select the reporting period and WP and then click “Enter Report” (see also Detailed Description of Reporting Functions)


**List Work Summary Reports**

This submenu provides a table of all WS reports that have been submitted.

After having selected Reporting Period, Company and WP, click “Show WS List”

An overview of all selected WS reports will be shown in a table. (See also Reports and Summaries)


**List Missing WS Reports**

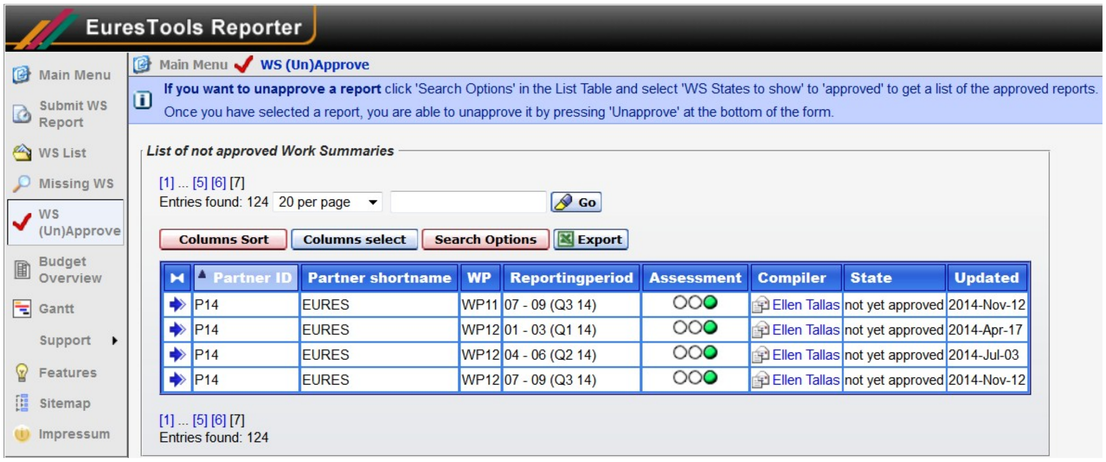
This submenu provides a table of all missing WS reports, private drafts, not yet approved and/or approved reports.

After having selected Start Month, End Month, Partner, WP, and WS status to show, click "Show reports".

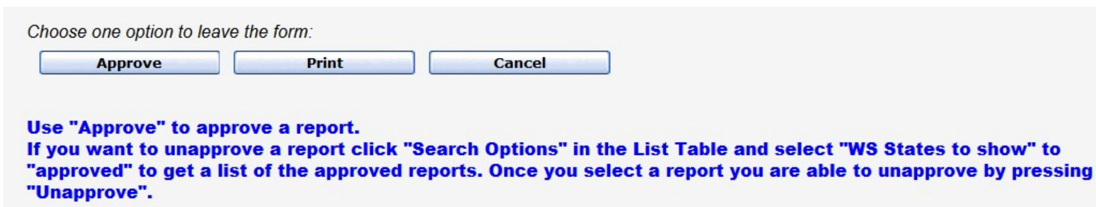
An overview of all selected WS reports will be shown in a table. (See also Reports and Summaries)


**(Un)Approve WS Reports**

This function is needed for the WP Leaders to approve WS reports for his/her WP. The WP Leader has to log in with his/her WP Leader account.




Select one report by clicking the arrow in the left column. The report opens. Read it, and if everything is okay, press the “Approve” button at the end of the report.

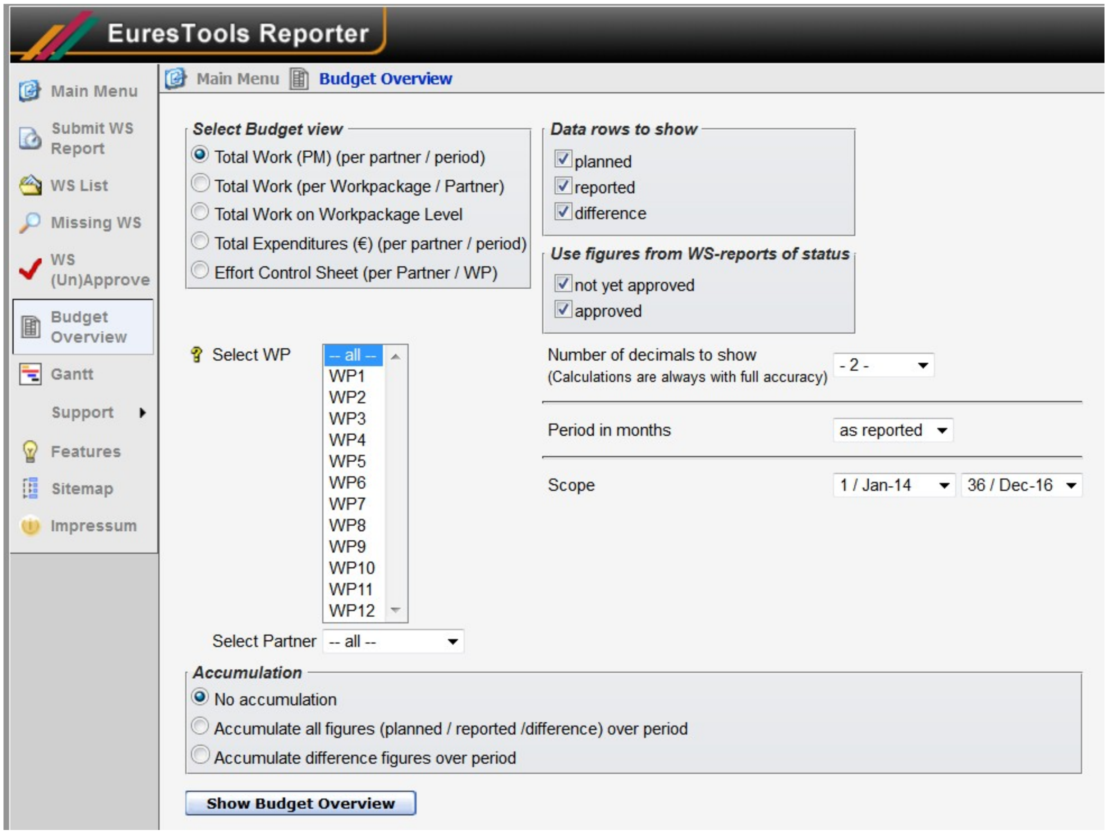



The submitted WS can be approved or, in case of later changes, can also be unapproved to allow re-submission of a WS.

**Budget Overview**

This submenu offers the selection of budget overview tables, showing the planned and consumed budget and the delta of both figures. Here you have a lot of alternative views, e.g. select Budget view, select WP, and select partner.

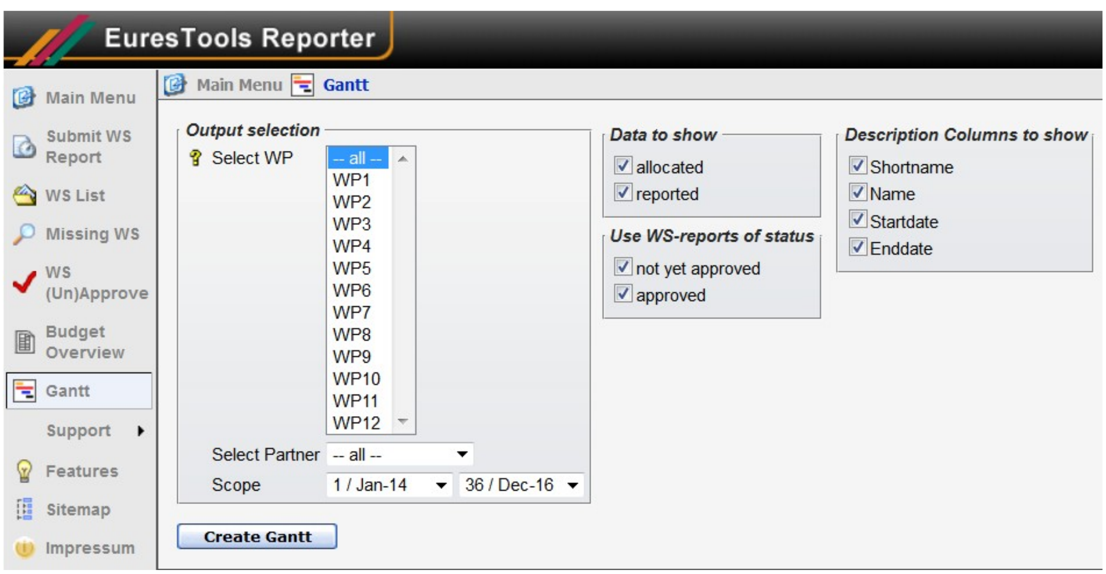
When you have finished your selections, click “Show Budget Overview”.




## Gantt

This submenu allows you to create a Gantt chart for the project.

When you have finished your selections, click “Create Gantt”.



**Features, Sitemap, Impressum**

These functions are not directly used for reporting purposes. They provide additional information on new functions, a site overview and details on the development company (Eurescom).

## Detailed Description of reporting functions

**Work Summary Reporting and Submit work summary**

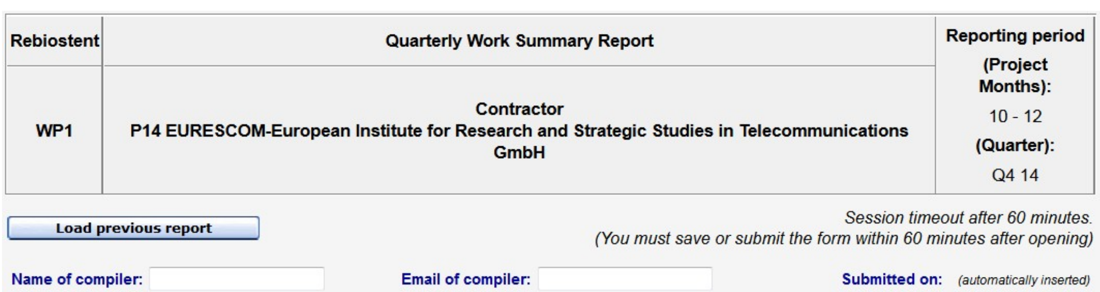
For WS reporting the menu item "Submit work summary" is selected.

Select reporting period and WP. You will see all WPs where you have budget. You only need to submit a report in an active WP where you have budget. If a WP will start later or is finished, you don't need to submit a report (see also the reminder you should have received by email which WS reports are missing).

If you did not spend any effort in a WP where you have budget this period, you should submit a "Zero" report to avoid unnecessary reminders. How to do that? Select reporting period and WP -> Press Enter Report. Put in "0" in Part II - Consumed budget, and tick Green in Part III -> Submit.

The selection of the reporting period and the work package must be done for each WP separately.


The selected WS report opens.




If this is the first WS report to be submitted in this WP, you have to enter Name of compiler and Email of compiler.

**Load previous report**

If this is not the first WS report to be submitted in this WP, you have the option to "Load previous report". The advantage is that you don't have to enter everything again, only update according to this reporting period.

The report consists of 4 different parts:

*Part I Summary of activities and results:* Provide a short Summary of the work done and Results / documents produced in the selected WP.

**PART I - Summary of activities and results** *(per Task)*

| Task | **Summary of work done** *(per Task)* | **Results / documents produced** *(E.g. type, title, file name)* |
|---|---|---|
| WP1 | | |

*Part II Consumed budget :* Enter the total person months (PM) and name of all experts who have worked in the WP.

**PART II - Consumed budget** *(in PM)*

| Task | **TOTAL PM per Task** *(Max. 2 decimals, E.g. 0.84)* | **Name of all experts who have worked in the respective Task** If several experts have worked in the **same** Task, please list name and effort for each of them. *(E.g. Tom Fischer (1 PM), Maria Lopez (0.8 PM), etc.)* |
|---|---|---|
| WP1 | | |

*Part III Assessment of overall project situation / comments:* In this part you can indicate level of your assessment and add comments e.g. delays, etc.

**PART III - Assessment of overall project situation / Comments**

*Level of assessment:*

X Green flag, project running as planned
O Amber flag, minor issues, none of them critical (please specify)
O Red flag, critical issues that need management actions (please specify)

**Any issue that has an impact on the project must be reported,**
*(e.g. delays, re-allocation of responsibilities, new work items, amber-flag items, red-flag items, etc.).*

**Comments:**

*Part IV Expenditures:* For Travels please enter one travel per row.

For Further expenditures, leave empty if nothing to report.

**PART IV - Expenditures**

**Travels:**

| **Start** (yyyy-mm-dd) | **End** (yyyy-mm-dd) | **Location** | **Purpose of travel** | **Names of all travellers** | **Estimated Costs (EUR)** | **Category** |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |

**Further expenditures:**

| | **Description** | **Estimated Costs (EUR)** | **Category** |
|---|---|---|---|
| **Subcontracts 1)** | | | |
| **Equipment** | | | |
| **Other Costs** (consumables, computing, etc.) | | | |

1) Results produced by subcontractors must be reported in Part I.

After completing the form you can choose from 4 different options:

***Submit:*** This button is used to transfer your report to our database. Note: a submitted report can still be opened again and re-submitted in case changes are needed.

***Save as private draft:*** This button should only be used if you are unable to fully prepare the report immediately and you want to continue later.

***Cancel:*** This resets the whole reporting process.

***Clear Form***: This function resets the form and deletes all information already entered.

*Choose one option to leave the form:*

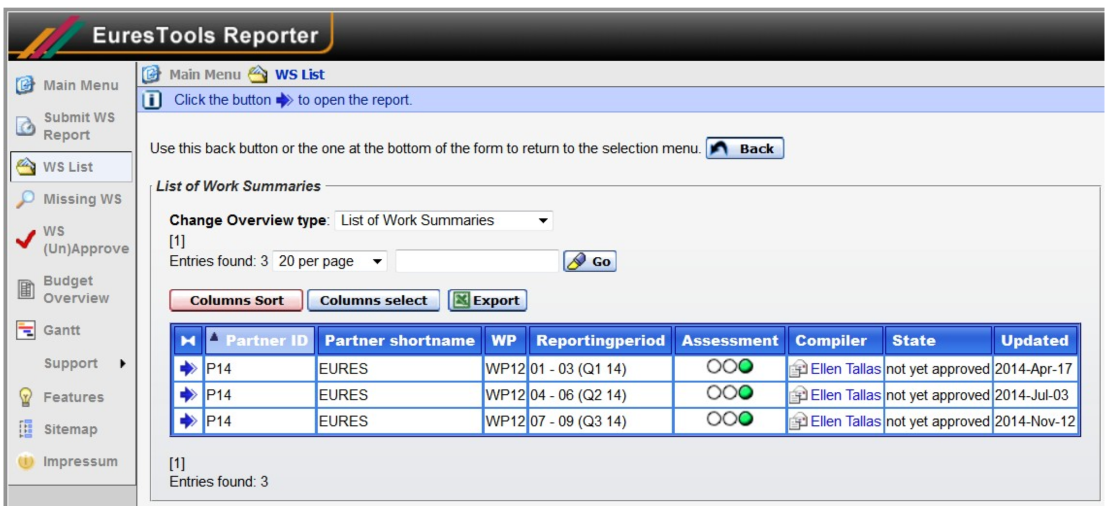
**Submit** | **Save as private draft** | **Cancel** | **Clear Form**

**Use "Save as private draft" only if you are unable to fully prepare the report immediately, and you want to continue later.**
**A report saved as private draft is only visible to the report editor.**
**Once you completed your report you must press "Submit". Only after this the WPL will be able to view and approve your report.**

## Reports and Summaries

The EuresTools Reporter provides a number of different reports that can be selected as needed. The most important reports are, certainly, the received WS from the partners. These reports can be selected from the menu "WS List".


If WP12 for P14 is selected the results are as follows:



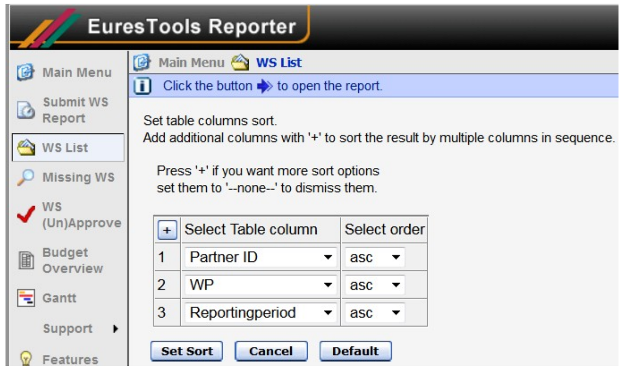

To go back to list Work Summary Reports, please use the 

button

The data presented in the table can be selected in many different ways. You can view a report by clicking the arrow in the left column.

Under **Columns Sort** the shown columns and the sorting can be selected.

If you don't want to do any changes, click Cancel to go back.




Under **Columns select** you can choose which data columns shall be shown:

When you have done your updates, click Select. If you don't want to change anything, click Cancel to go back.


**Export to Excel**

**Export**

For extended use of the data all tables can be exported to Excel. With the exported data further data evaluation can be applied and the output data can also be further customised and formatted, e.g. for internal reporting.

Depending on the number of selected columns the spreadsheet can become quite large. For further data handling it may be necessary to customise the tables according to your particular needs.