



ACTIVITY REPORTING



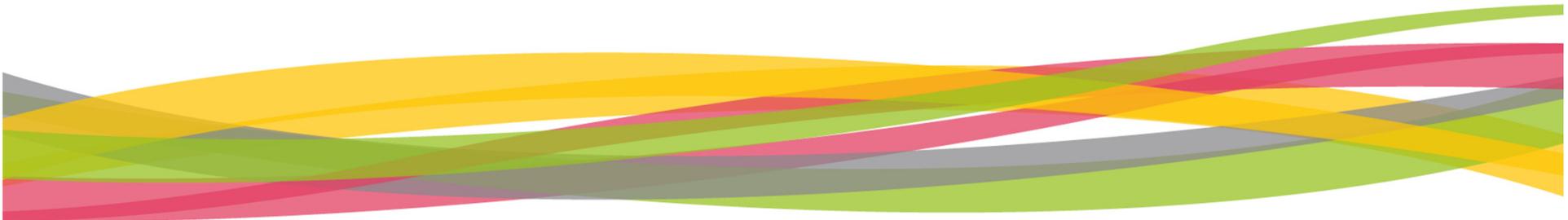
@Transnational seminar on project reporting
Copenhagen 22 February 2018

Jesper Jönsson



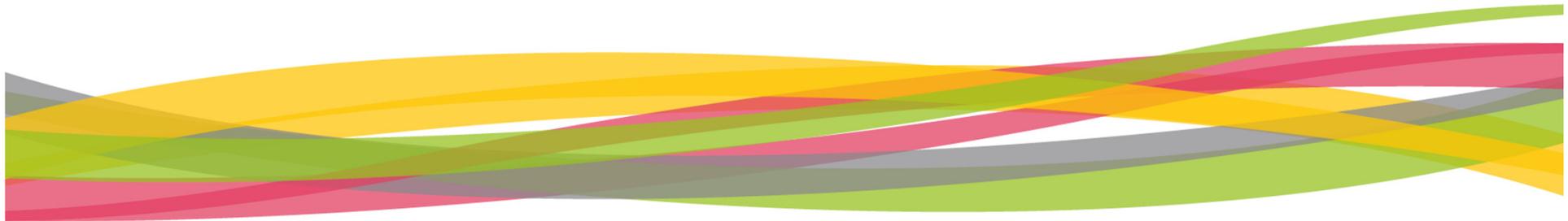
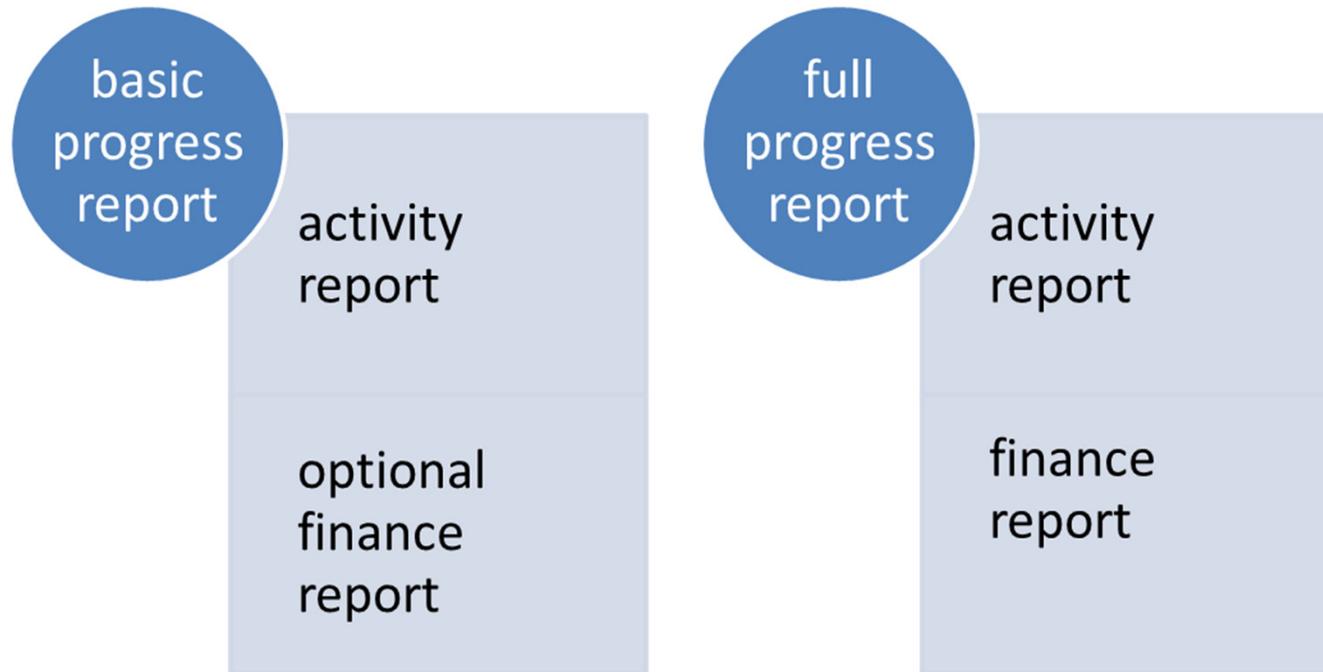
Agenda

- Information that you need to know!
- Run through of the activity reporting process, including all tabs on the Online Monitoring System form
- Tricks and tips





Clarification





Changes

! Reporting and a request for a change cannot happen at the same time !

Why?

In order to ensure that the latest approved data can be included with the following report.



Address any approved changes in the report
(Full progress report, Details, Project
Implementation)

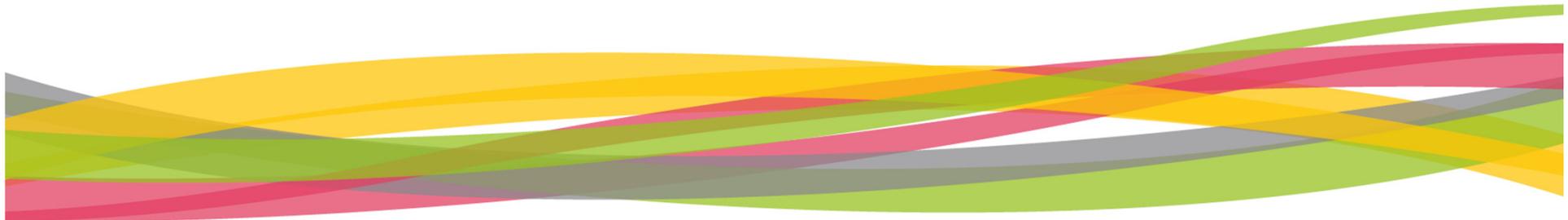




Special requirements from the Steering Committee

Approval letter: section about comments from the Steering Committee

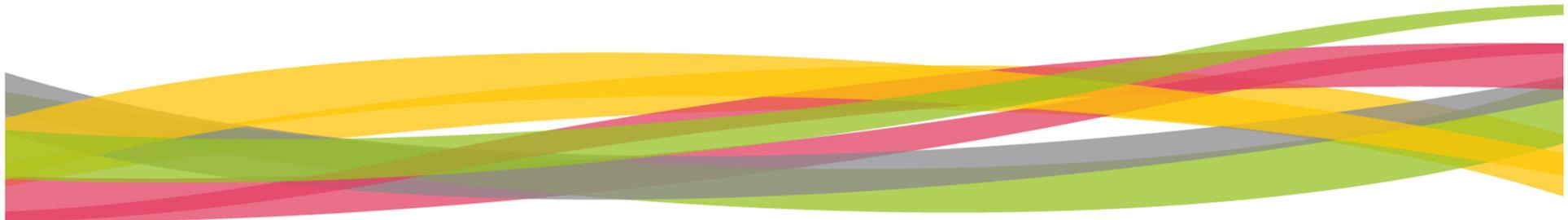
 Report on your fulfillment of the requirements in an annex to the report.





Lead beneficiary principle

1. Compiled beneficiary activity reports = project level activity report
2. Lead beneficiary decides which tabs need to be filled out by which beneficiary (optional vs. mandatory fields)





Local partnership reporting

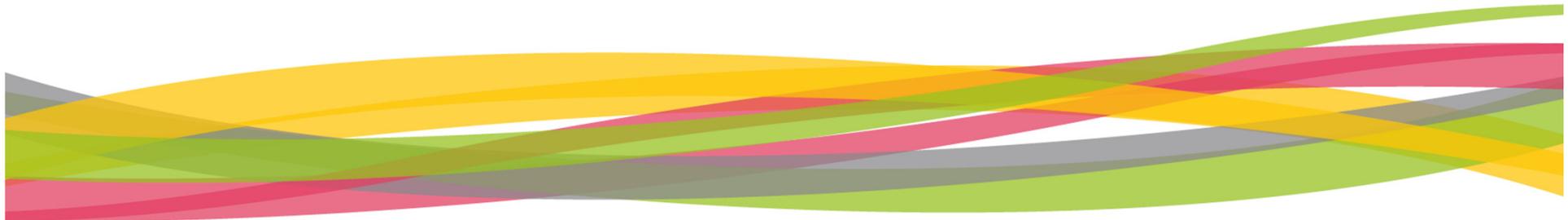
Joint Secretariat's recommendation:

activity report

Coordinating beneficiary fills out one report, which includes all relevant information of all beneficiaries in the whole local partnership.

finance report

Co-beneficiaries give relevant information to the coordinating beneficiary who fills out the individual finance reports for each and every co-beneficiary.



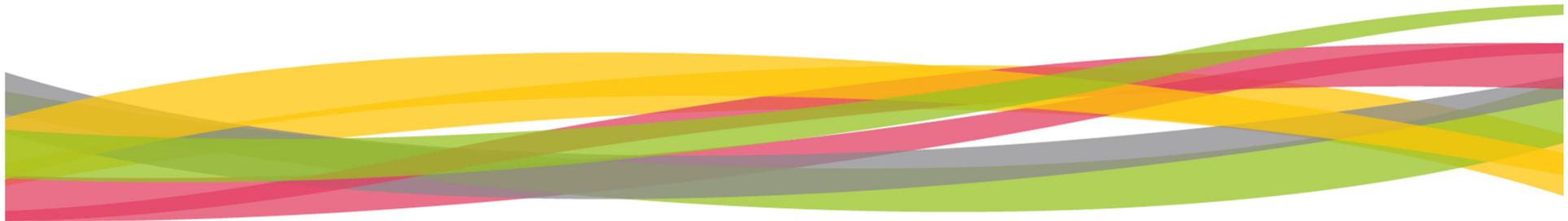


Special rules for Local Partnerships

+Co-beneficiaries cannot have their own Authorised Signatory. The Authorised Signatory of the Coordinating beneficiary signs off on all documents.

+Co-beneficiaries do not have their own First Level Controller (generally). The coordinating beneficiary's designation is valid for the entire local partnership.

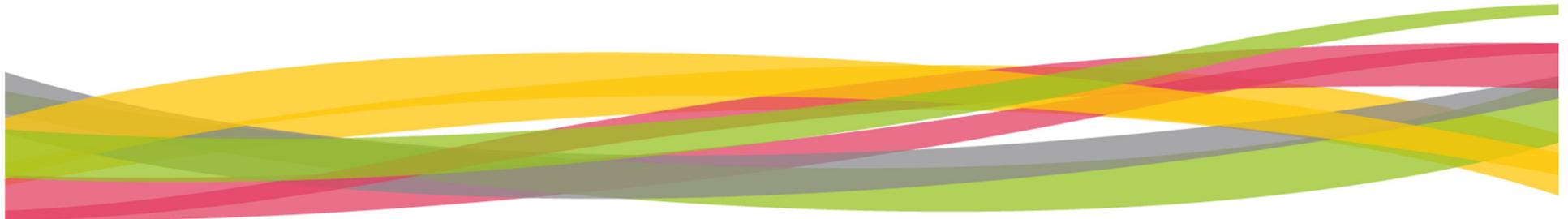
+However... in exceptional cases individual co-beneficiaries have the option to designate their own first level controller.





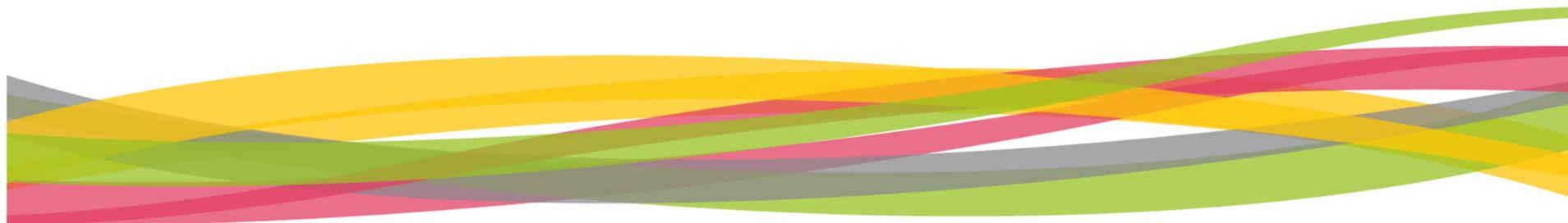
Work flow...

First finance then activity!





TRANSNATIONALITY

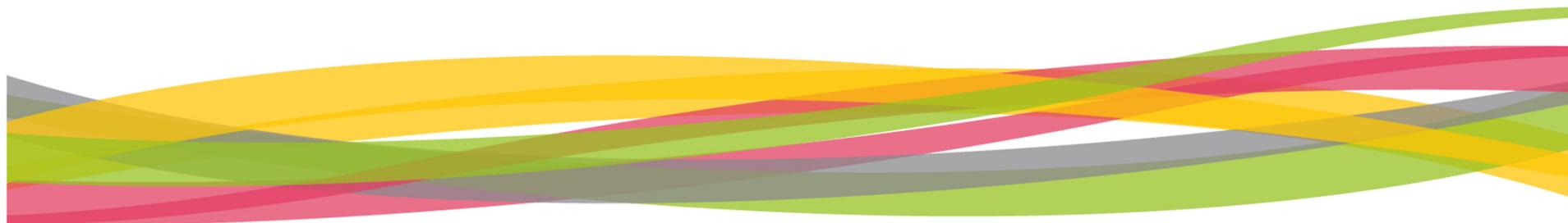




Overview about tabs

- Main details
- Objectives
- Outputs
- Results

- Deliverables
- Details
- Annexes
- Submission





Overview about tabs (full progress report)

ⓘ **Workflow:** Report completed and locked: No FLC approval of Finances: No Finance report signed by AS: No Progress report signed by Authorised Signatory: No Submitted to LB: No

Main details | Objectives | Outputs | Results | Deliverables | Details | Annexes | Submission

| | |
|------------------------|--|
| Project | FDA! |
| Reporting Round | #2 |
| Reporting level | Beneficiary |
| Beneficiary | FDA6 Norway |
| Report Type | Full Progress report with Finance report |
| Form Version | Full Progress Report (July 2017) |
| Project end date | 30/06/2018 |
| Project start date | 04/03/2015 |
| Report Number | 2 |
| Reporting period start | 04/04/2017 |
| Previous Report | 1 @ #1 , FDA6 Norway |
| Reporting period end | 07/04/2017 |

Highlights of main achievements

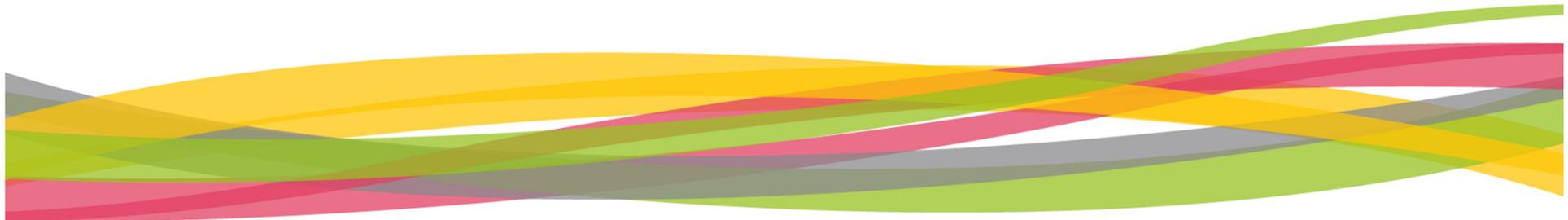
- ⓘ **Report contact persons**
 + Beneficiary Managing User: Demo LeadBen @ OMS-LB
 ✓ Beneficiary Authorised Signatory: Peter Coordinating @ OMS-local-Ben
 ✓ Beneficiary First Level Controller: John Smith @ FLC-LB
 + Lead Beneficiary/Managing User: Demo LeadBen @ OMS-LB





Highlight of main achievements

- Key outputs, results and deliverables
- Aligned with the objectives of the project
- Investments
- Any publicity awards or any other
- Impact or influence on policy





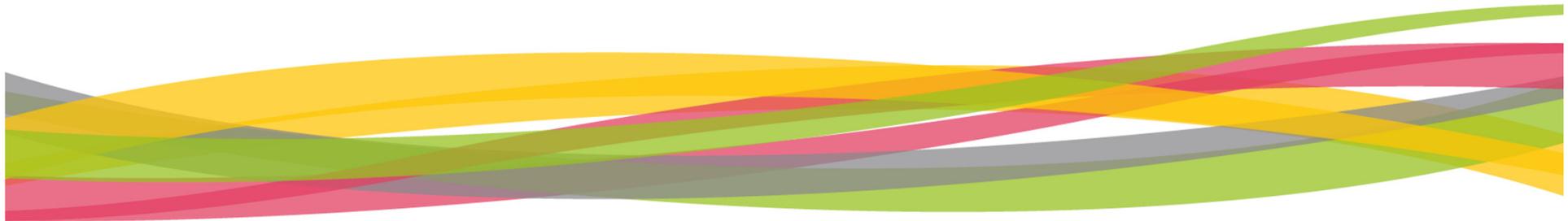
Objectives

① Workflow: Report completed and locked: No FLC approval of Finances: No Finance report signed by AS: No Progress report signed by Authorised Signatory: No Submitted to JS: No

[Main details](#) **Objectives** [Outputs](#) [Results](#) [Deliverables](#) [Annexes](#) [Submission](#)

Progress towards Project detailed objectives

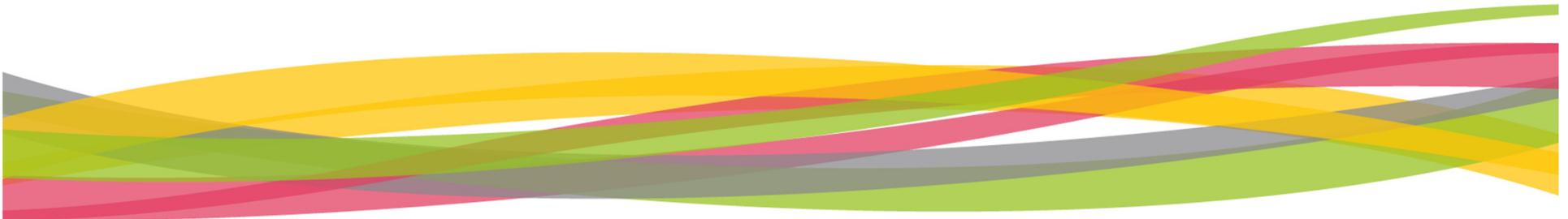
| Objective / Description of objective | Level of achievement | Explanations |
|--------------------------------------|----------------------|--------------|
| Test Objective | not achieved | test |
| test | | |





Objectives

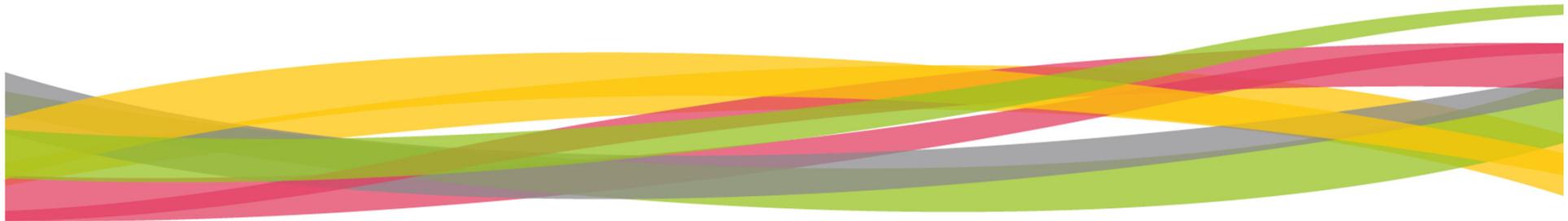
- Objective/ Description of objective = taken from the original application
- Level of achievements (drop-down menu): fully achieved, to a large degree, to a minor degree, not achieved
- Explanations = needs to be filled out





Objectives - Explanations

- What? How? When? Why?
- Next steps
- Aligned with the overall objectives of the project
- Link to key deliverables, outputs and results
- How are the detailed objectives linked to pilots/ investments
- Impact?





Deliverables

① **Workflow:** Report completed and locked: No FLC approval of Finances: No Finance report signed by AS: No Progress report signed by Authorised Signatory: No Submitted to JS: No

[Main details](#)
[Objectives](#)
[Outputs](#)
[Results](#)
[Deliverables](#)
[Annexes](#)
[Submission](#)

Reporting per Work Package

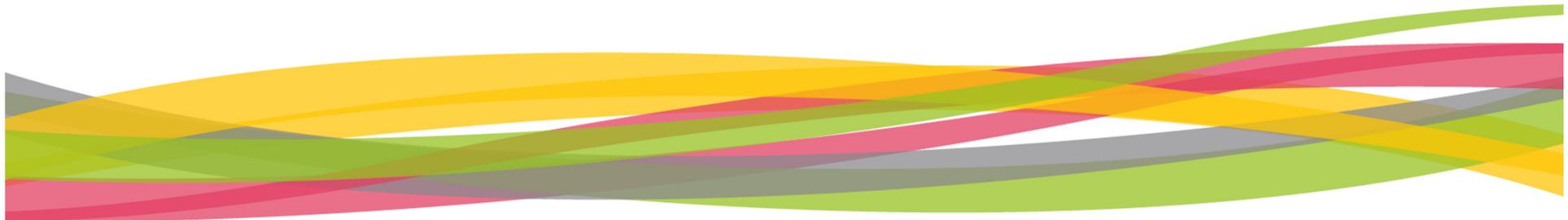
| Work Package Number/Title | Work Package Period | | Work Package status | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
|---|--|---------------------------|---|---------------------|-------------------------|---------------------------|-----------|-----------------|--------------------------------------|----------|-----------|-------------|--------|---------------------|-------------------------|---------------------------|-----------|--------|--------------------------------------|-------------------|--|-----------|------|---|-----|-----|-----|-----------------|------|---------------|------------------------|---------|-----|---|---|---|-----|-------------|------|--------|------------------------|------|------|---|---|---|------|-------------|------|
| 1 Project management | Jul/2015 - Apr/2016 | | Not started | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| WP Responsible Beneficiary | FDA1 Denmark LB | WP Involved Beneficiaries | - FDA5 Germany Berlin - FDA7-10 Germany Munich | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Who has used the main deliverables from this Work Package? | - | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| How have you involved target groups (and other stakeholders) in the delivery of the Work Package? | N/A | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Progress in this period | test | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Problems and solutions found | test | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Progress on Activities and Deliverables | <table border="1"> <thead> <tr> <th>Activity</th> <th>Indicator</th> <th>Deliverable</th> <th>Target</th> <th>Achieved Previously</th> <th>Achieved in this period</th> <th>Total achievement to date</th> <th>Remaining</th> <th>Status</th> <th>Description of progress / Attachment</th> </tr> </thead> <tbody> <tr> <td>1 Test Activity 2</td> <td>Exchange of Information Event (Internal)</td> <td>Customers</td> <td>1100</td> <td>0</td> <td>200</td> <td>200</td> <td>900</td> <td>Behind schedule</td> <td>test</td> </tr> <tr> <td>Seminar (sub)</td> <td>Number of participants</td> <td>Persons</td> <td>300</td> <td>0</td> <td>0</td> <td>0</td> <td>300</td> <td>Not started</td> <td>test</td> </tr> <tr> <td>2 blöd</td> <td>Number of participants</td> <td>blöd</td> <td>5000</td> <td>0</td> <td>0</td> <td>0</td> <td>5000</td> <td>Not started</td> <td>test</td> </tr> </tbody> </table> | | | | | | | | | Activity | Indicator | Deliverable | Target | Achieved Previously | Achieved in this period | Total achievement to date | Remaining | Status | Description of progress / Attachment | 1 Test Activity 2 | Exchange of Information Event (Internal) | Customers | 1100 | 0 | 200 | 200 | 900 | Behind schedule | test | Seminar (sub) | Number of participants | Persons | 300 | 0 | 0 | 0 | 300 | Not started | test | 2 blöd | Number of participants | blöd | 5000 | 0 | 0 | 0 | 5000 | Not started | test |
| Activity | Indicator | Deliverable | Target | Achieved Previously | Achieved in this period | Total achievement to date | Remaining | Status | Description of progress / Attachment | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1 Test Activity 2 | Exchange of Information Event (Internal) | Customers | 1100 | 0 | 200 | 200 | 900 | Behind schedule | test | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Seminar (sub) | Number of participants | Persons | 300 | 0 | 0 | 0 | 300 | Not started | test | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2 blöd | Number of participants | blöd | 5000 | 0 | 0 | 0 | 5000 | Not started | test | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |





Deliverables

- Lead Beneficiary principle
- Description of progress
- What? How? When? Why? Next steps
- Transnational
- Aligned with the objectives
- Attachments





Outputs

① Workflow: Report completed and locked: No FLC approval of Finances: No Finance report signed by AS: No Progress report signed by Authorised Signatory: No Submitted to JS: No

Main details Objectives **Outputs** Results Deliverables Annexes Submission

Progress to date on outputs

| Output Indicator | Output target | Achieved Previously | Achieved in this period | Total achievement to date | Explanations | Level of achievement | Attachment |
|---|---------------|---------------------|-------------------------|---------------------------|--------------|-----------------------------------|------------|
| Number of green products, services and processes piloted and/ or adopted by the project | 100 | 0 | 2 | 2 | test | Proceeding according to work plan | |
| Number of enterprises participating in cross-border, transnational or interregional research projects | 5500 | 0 | 30 | 30 | test | Proceeding according to work plan | |
| Number of research institutions participating in cross-border, transnational or interregional research projects | 200 | 0 | 25 | 25 | 25 | Behind schedule | |
| Number of organizations/ enterprises adopting new solutions by project end | 1000 | 0 | 120 | 120 | test | Proceeding according to work plan | |
| Number of organizations/ enterprises informed about new solutions by project end | 350 | 0 | 70 | 70 | test | Proceeding according to work plan | |

① Report contact persons

- Project First Level Controller: John Smith @ FLC-LB
- Project Authorised Signatory: Gianis LeadBen @ AS-LB
- Project Authorised Signatory: Demo LeadBen @ OMS-LB
- Lead Beneficiary/Managing User: Demo LeadBen @ OMS-LB





Outputs

- Output Indicator = taken from the original application
- Output target = taken from the original application
- Achieved Previously = taken from the previous report
- Achieved in this period = needs to be filled out
- Total achievement to date= accumulated automatically by the system
- Explanations = needs to be filled out
- Level of achievement (drop-down menu) = Not started, Proceeding according to work plan, behind schedule, ahead of schedule. completed and achieved more than planned, completed and achieved less than planned
- Attachment = not mandatory





Results – full progress report ONLY

Workflow: Report completed and locked: No FLC approval of Finances: No Finance report signed by AS: No Progress report signed by Authorised Signatory: No Submitted to JS: No

[Main details](#)
[Objectives](#)
[Outputs](#)
[Results](#)
[Deliverables](#)
[Annexes](#)
[Submission](#)

Progress to date on results

| Project Result | Result target | Measurement Unit | Baseline value | Achieved Previously | Total achievement to date | Achieved in this period | Explanations | Level of achievement | Attachment |
|-----------------------|---------------|------------------|----------------|---------------------|---------------------------|-------------------------|--------------|----------------------|------------|
| Test Result Indicator | 10000 | TEST1 units | 10000 | 0 | 0 | 0 | test | Not started | |

Report contact persons

- Project First Level Controller: John Smith @ FLC-LB
- Project Authorised Signatory: Gianis LeadBen @ AS-LB
- Project Authorised Signatory: Demo LeadBen @ OMS-LB
- Lead Beneficiary/Managing User: Demo LeadBen @ OMS-LB

User Log of actions

-  27/02/2017 21:12:18  Demo LeadBen  Progress Report set as completed
-  28/02/2017 00:03:19  Demo LeadBen  Progress Report signed by AS and submitted -  [Submission file](#)
-  22/03/2017 12:47:12  Demo LeadBen  Progress Report set as completed



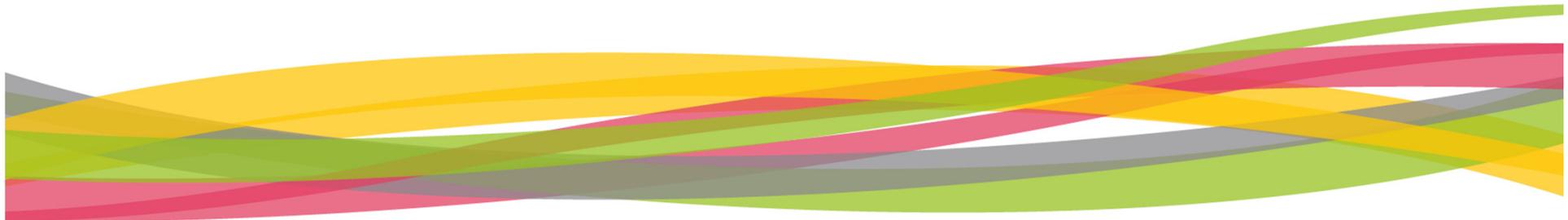


Details – full progress report ONLY (examples)

Transnationality: What was the added value working transnationally during the period?

Knowledge Transfer: How has the project enhanced / added value to current and former programmes and project(s) it is associated with?

Project Implementation: Have there been any problems in implementing the project during this period? Changes? If so, what steps were taken to address them?

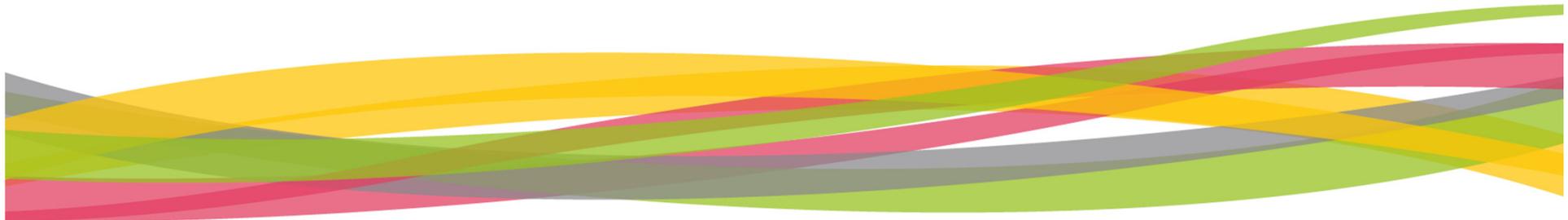




Details – full progress report ONLY (examples)

Activities outside the Programme area: Were there any activities taking place outside the eligible area during the reporting period?

Capitalisation: What's the scale-up of collective actions, outcomes, deliverables and results being used by external users? What is the extra leverage on transnational level? Does these scale-up efforts also have a gradual improvement in regional policies?

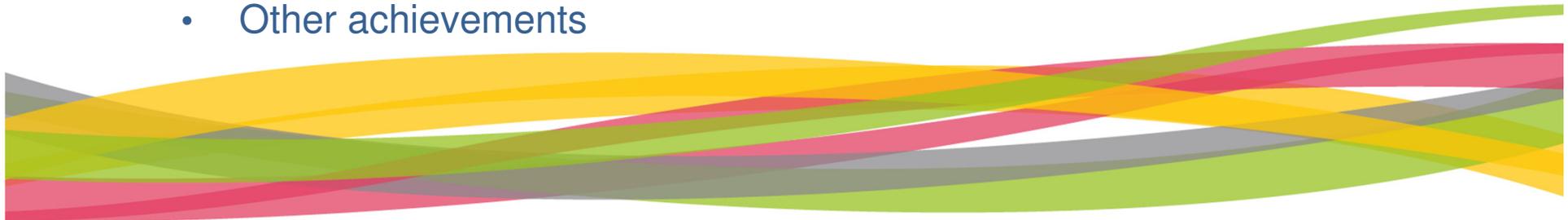




Annexes:

Please avoid the same annexes in different parts of the report - and make sure titles of annexes are clear and relevant!

- Evidence of content level achievements
- Project Deliverables - studies, reports/strategy papers, political agreements, adoption of new processes, new standards, new tools
- Investments –billboard/plaques
- Publicity
- Other achievements





Submission

① **Workflow:** Report completed and locked: No FLC approval of Finances: No Finance report signed by AS: No Progress report signed by Authorised Signatory: No Submitted to JS: No

- Main details
- Objectives
- Outputs
- Results
- Deliverables
- Annexes
- Submission**

Created by / Contact person Demo LeadBen @ OMS-LB

Date of creation 22/11/2016 09:07:01

Modified by Tech Support @ Apogee

Date of modification 18/09/2017 12:25:32

Completed, Locked No

Completed on

Signed by Authorised Signatory

Authorised Signatory, signed on

Approved by FLC

Approved by FLC on

Signed file

Sent to JS No

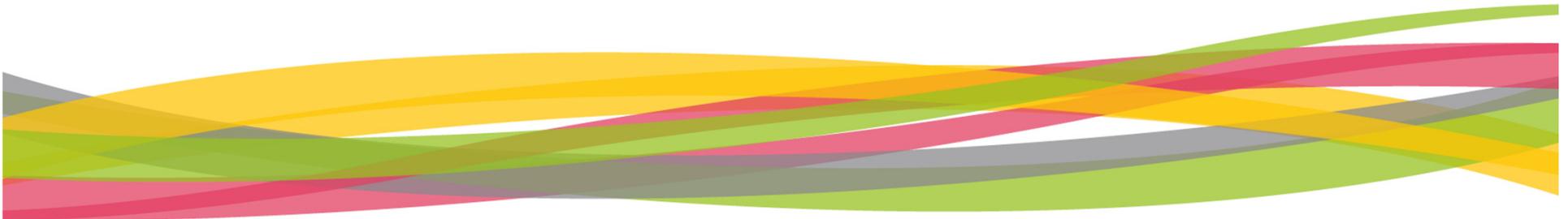
Sent to JS on





Submission

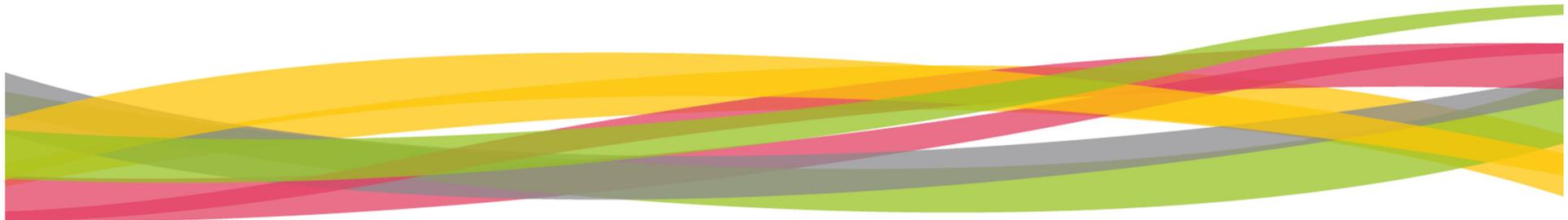
- Complete the activity report
- Finance report = FLC plus AS
- After the AS approval, beneficiary send it to the LB





Tricks and tips

- LB – in charge of internal organisation of activity reports
- Project level report – demonstrates what has been delivered with transnational cooperation
- Mandatory fields are highlighted and must be completed
- Annexes – show achievement
- Submission stage: First finance then activity!





www.kahoot.it

