

# **eReports 1.1.1**

## **User Guide**

**How to complete and submit  
a Project Report using eReports**

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## A - Technical requirements

The eReports system is an online tool that requires an Internet Browser to be able to complete and submit a report.

### Internet Browser

Supported browsers are:

- Internet Explorer
- Firefox

The **minimum** version i.e. lowest version of Internet Browser that you must have installed on your computer is:

- Internet Explorer - version **9.0**
- Firefox – version **25.0.1**

### Access to Participant Portal and eReports

eReports is available via the Participant Portal and two things are mandatory to have access to it.

- To have an EU Login account.
- To have a role assigned in the Participant Portal for the project

#### a) How to create an EU login account?

*ECAS became EU login, for people who already had an ECAS account, this account still valid with EU Login.*

*If you do not yet have an EU login account, please visit the EU login registration website where you can create your account including an EU login username and password. The website is reached through the following link: <https://webgate.ec.europa.eu/cas/eim/external/register.cgi>*

## Create an account

[Help for external users](#)

First name

Last name

E-mail

Confirm e-mail

E-mail language

**b) How to assign roles in the Participant Portal for a project**

If both roles, Coordinator and Legal Representative, are under the responsibility of the same organisation (same PIC number), then by default the person who is given access to eReport for a specific project is the coordinator of the project (the person listed in the part A.2 of your application form :

- A.2 Person responsible for the management of the application (contact person) =>
  - ▶ will receive Primary Coordinator rights on the eReport

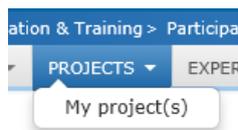
If both roles, Coordinator and Legal Representative, are under the responsibility of two different organisations (different PIC number), then by default, the persons who are given access to eReports for a specific project are those who were listed in the parts A.2 and A.3 of your application form:

- A.2 Person responsible for the management of the application (contact person)
  - ▶ will receive Primary Coordinator rights on the eReport
- A.3 Person authorised to represent the organisation in legally binding agreements (Legal Representative)
  - ▶ will receive Coordinator rights on the eReport

The LEAR has no access to the eReport

Only the Primary Coordinator and the Coordinator can give access to the eReports to someone else. The procedure is the following:

- The Primary Coordinator/Coordinator has to be logged in in the Participant Portal
- Go to Projects => My project(s)



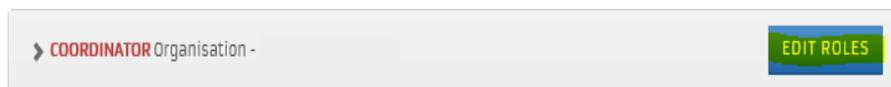
- Choose the "PC" action of your project



- Go to the Consortium Tab



- Click on "Edit Roles"



- A new window will be displayed and all persons with an assigned role to the project will be listed.
- To revoke a role, tick the person and press the "revoke" button at the bottom of the list
- To add a person click on the "Add Roles" button, this screen will appear

Role : \*

First Name : \*

Last Name : \*

Email : \*

\* required field

- Fill the mandatory fields and press "OK". The roles are described in the page 8 of this user guide.

**Important Note:** The role is associated to the e-mail address, so make sure that it's the one associated with an EU Login account. After pressing "OK", an e-mail will be sent to that e-mail address to notify the person that she has been assigned a role in the project. If there is no EU Login account associated to this e-mail address, the person will be requested to create one.

## B - Overview of the process

The reporting process for granted projects requires electronic submission of project report(s), via the internet. This process is identical for all type of reports, such as **Interim** and **Final Reports**.

The steps in the reporting process can be seen in the schematic diagrams below.



## STEP 1: ACCESS THE PARTICIPANT PORTAL

In order to submit a report, the first thing that you need to do is to access the **Research and Innovation Participant Portal**.



**Note:** *Education, Audio-visual, Culture, Citizenship and Volunteering Participant Portal and Research and Innovation Participant Portal are interconnected; all your submitted projects via Education, Audio-visual, Culture, Citizenship and Volunteering Participant Portal are present in Research and Innovation Participant Portal.*

You will need an EU Login account in order to fill the report in the Participant Portal. If you do not have an EU Login account, you can find a link to the EU Login registration website in the 'Technical requirements' section of this user guide. The home page of the Participant Portal also includes a link to the EU Login registration website (click on the link 'Register').

To enter the Participant Portal, click on the following link:

[Enter the Research and Innovation Participant Portal](#)

Use your credentials to **log in**.



## STEP 2: SELECT THE PROJECT TO REPORT AND THE REPORT

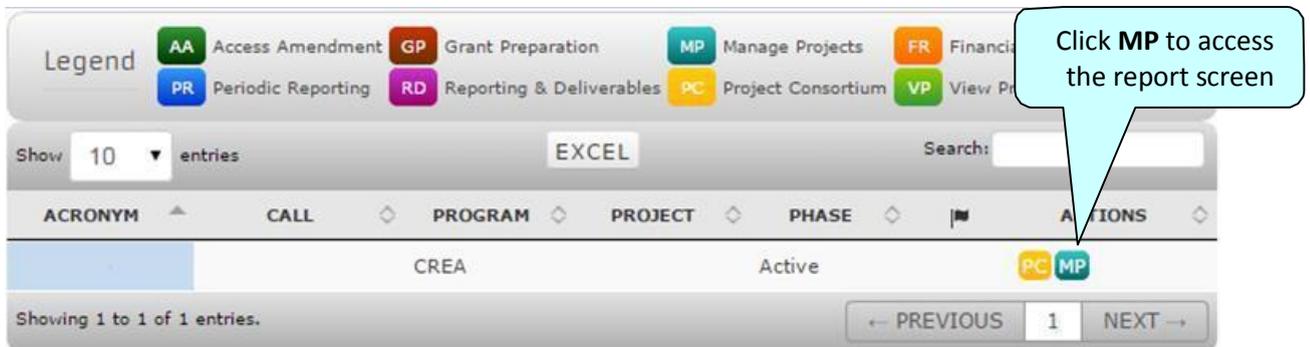
### Select the Project

The next step is to access the project that you want to manage the report.

Open the section **My Project(s)** in order to have access to the list of projects you are part of.



For the project you want to access the reports, click the corresponding button.



### Select the Report

A new window will open, listing all the Reports available for that project.

Project Number: :			
Please Choose your report :			
Report	Submission Date	Deadline for Submission	Action
Interim Report 1	31-12-2015		<a href="#">View</a>
Final Report		01-04-2015	<a href="#">Edit</a>

For each report, you will have two different (exclusive) actions available:

**View** – Gives you access to the report in *read-only* mode. This means that no changes are allowed and neither is submission. This happens when one of the following occurs:

- The report was already submitted;
- The role you have been assigned for the project only allows you to view the report;

**Edit** - enables to add new or edit content of the report and to submit it.

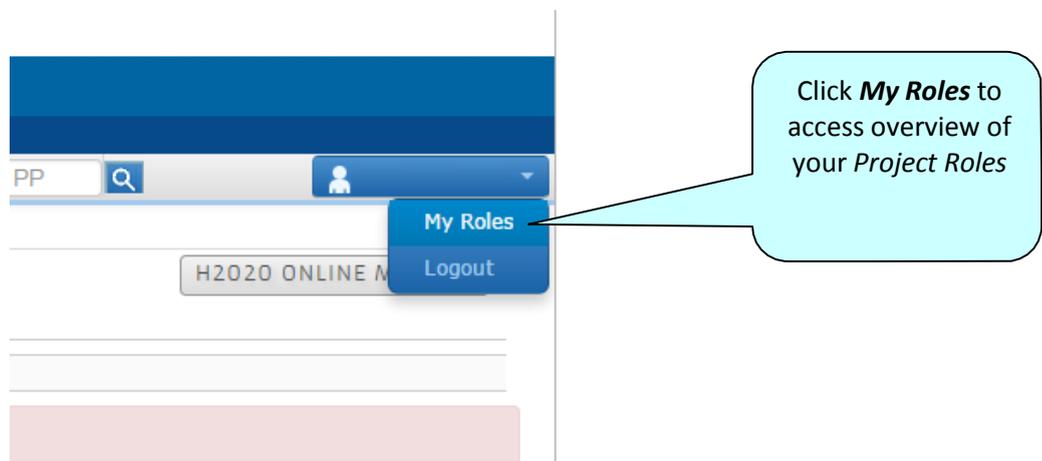
### Access Rights based on the Project Role

Actions in eReports such as View, Edit or Submit are limited to only to those who have proper access rights. These rights are described in the table below and are based on the roles granted by the Project Coordinator in the Participant Portal.

ROLES	REPORT RIGHTS
Primary Coordinator contact	<b>View</b> a Report <b>Edit</b> a Report <b>Submit</b> a Report
Coordinator Contact	
Participant Contact	<b>Edit</b> a Report
Project Financial Signatory	
Project Legal Signatory	
Task Manager	
All other Roles	Access <b>Forbidden</b>

#### Check your Project Role in Participant Portal

To check your role in selected project, use **Personal Menu** in the top right part of the screen and select option **My Roles**.



## Overview of users Project Roles

ACRONYM	PROJECTID	PROGRAM	ROLE	PIC
		CREA	Coordinator Contact	

Showing 1 to 1 of 1 entries.

Check if your role for selected project is matching desired role from **Access Rights Table**

For more information on how to assign roles and rights in the Participant Portal, please find detailed information here: [http://ec.europa.eu/research/participants/docs/h2020-funding-guide/user-account-and-roles/roles-and-access-rights\\_en.htm](http://ec.europa.eu/research/participants/docs/h2020-funding-guide/user-account-and-roles/roles-and-access-rights_en.htm)

**NOTE: If you have any questions regarding the role you have been assigned, please contact your Project Coordinator.**

## STEP 3: COMPLETE THE REPORT

### Main Navigation

The contents displayed in eReports are specific to each configured action/activity and therefore the main navigation pane on the image bellow serves only as example. Each report, depending on the action the project is part of, might have more or less tabs displayed.

By clicking on the tab you will be redirected to the specific section of the report.



Depending on the tab you click and the configuration of the report, you may have an additional level of tabs with additional information.



### Mandatory fields

The report contains two types of fields:

- Mandatory fields - marked with symbol ' \* ' must be filled, form can't be submitted without it
- Optional fields – can be filled, but are not necessary for form submission

### Save and Cancel

Save and Cancel buttons available at the bottom of the screen provide options to save the changes or cancel the changes made. Selecting Cancel will restore previously saved version of the report.



If you select Cancel changes, you will be asked to validate this selection by pop-up screen.

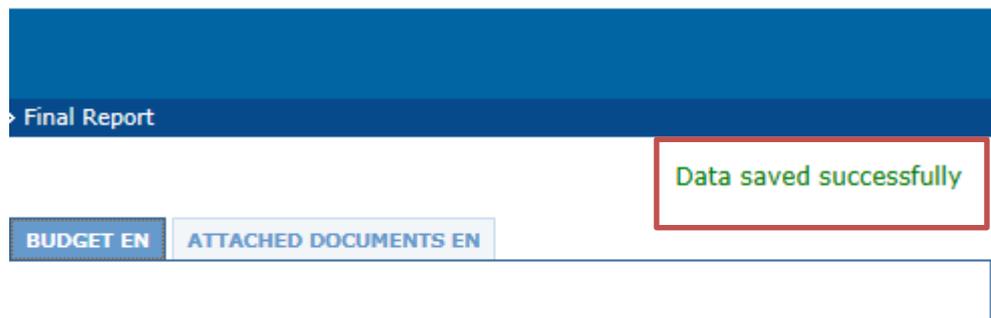


## Automatic Save function

eReports includes an automatic save feature, which saves the content of the report:

- when user changes a report tab
- a new row is added/removed in a table (when available)

NOTE: **Automatic save is not performed when the user closes the Browser**



**Important!**  
**Completed report needs to be submitted.**  
**Saved ≠ Submitted.**

## Attached Documents (when available)

Most of the reports include a section to allow annexes to be attached. These annexes are a formal part of the report and depending on the type of action, they may be mandatory or not.

The Attachments section is located in tab Attached Documents and the following screenshot provides an *example* of how it may look:

### Report \*



\* Mandatory File(s).

\*\*\* document total size can not exceed 10Mb

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### Attachment size limitation

There is a limit to the **total** (combined) size of your attachments. **10MB** is the limit. If you receive a message, warning you that the total size of documents exceeds the maximum allowed, please reduce the size of one or more attachments. For image-based documents, you can start by reducing their images resolution.

### Report Preview

Before submitting your report, you have option to preview the whole report as single PDF document. To do so click on button '**Report**', available at the bottom of the screen.



You'll be asked if you want to save the report preview or open it directly. Please select **Open**.



You can also save the PDF in your local machine.

While it's not submitted, the report is shown with the "**Draft**" watermark.



## EUROPE FOR CITIZENS

**Operating grants: Structural support for  
European public policy research  
organisations (think tanks) and civil society  
organisations at European level. sub-  
programme**

### Interim Report form

Programme	EUROPE FOR CITIZENS
Sub-Programme	Operating grants: Structural support for European public policy research organisations (think tanks) and civil society organisations at European level.
Action	European Remembrance
Sub-Action	N/A
Call for Proposal	COMM-C2/01-2013
Project number	
Agreement/decision number	
Project Title	N/A
Language used to complete the form	TO-BE-ADDED

## STEP 4: REPORT SUBMISSION

On the main navigation of the report is the *Submit* tab.

### Mandatory fields check

*Submit* tab automatically perform various checks to ascertain whether your form is ready for submission. For example, the validation will verify that all mandatory fields have been completed and that all the mandatory attachments are present.

If there are any mandatory fields not filled, these will be listed. The following screenshot provides an *example* of how it may look.



### Submission of the Report

When all mandatory fields are filled, submit the report is ready for submission and button Submit report is enabled. The following screenshot provides an *example* of how it may look.

Language of the report selection indicates which language was used to fill the fields of the report.

To submit the report select the language and press the **Submit report** button.



When the submission is complete you will see:

***Report submitted***

**Important!**  
**Once you have submitted the form, it is not possible to edit the report anymore.**

## Acknowledgment of receipt

After success of submission of the report, Coordinator of the project will receive an **acknowledgment of receipt** on his/her email address.

Dear Sir/Madam,

We acknowledge receipt of the Report that you have just submitted electronically with the following reference number:

- Project number 00000-CITIZ-0-0000-1-HH-CCCC-CCCC
- Decision/Grant Agreement 9999-9999

Yours faithfully,

Education, Audiovisual & Culture Executive Agency (EACEA)

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Madame, Monsieur,

Nous accusons réception de la soumission électronique de votre rapport concernant le projet ayant les références :

- Numéro de projet : 00000-CITIZ-0-0000-1-HH-CCCC-CCCC
- Numéro de Décision/Convention de subvention : 9999-9999

Salutations distinguées.

L'Agence Exécutive Education, Audiovisuel et Culture

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Sehr geehrte Damen und Herren,

Hiermit bestätigen wir den Eingang Ihres Berichtes, den Sie soeben elektronisch unter der folgenden Referenznummer eingereicht haben:

- Projektnummer 00000-CITIZ-0-0000-1-HH-CCCC-CCCC
- Entscheidung/Vereinbarungsnummer 9999-9999

Mit freundlichen Grüßen,

Exekutivagentur für Bildung, Audiovisuelles & Kultur

## C - Assistance

If you encounter any issue that are not addressed in this guide, you may need to reach EACEA in order to request assistance.

Please note that if you have issues related with the use of the Participant Portal (user registration, roles and access rights, Proposals, Grants, etc.) please refer to the FAQ section through the link: [Frequently Asked Questions](#). If required, you can also submit a specific help request using the Participant Portal contact form, available [here](#).

### Technical Assistance

If you encounter technical issues that are not addressed in this guide you may contact the EACEA Helpdesk to request assistance. The contact details and hours of operation are as follows:

EACEA Helpdesk	Availability
<p><b>Tel:</b> +32 229 99099</p> <p><b>Email:</b> <a href="mailto:eacea-helpdesk@ec.europa.eu">eacea-helpdesk@ec.europa.eu</a></p>	<p>08:30 to 17:30, Monday to Thursday</p> <p>08:30 to 17:00, Fridays</p> <p>Excluding public holidays and European Commission holidays</p> <p>All times are Brussels time</p>

When contacting the Helpdesk, please have the following information to hand or include it in your email message:

- Your telephone number and your email address;
- The entire project reference;
- Your [Project Role](#) in Participant Portal;
- Date and time when the problem occurred;
- The following details for the computer that you are using to complete and submit your application:
  - The internet browser and version you are using;
  - The operating system and version installed on the computer;
- Description of the action you were performing immediately before finding the problem;
- Details of any error messages / error codes that you encountered;
- Screenshots of the problem (if contacting the Helpdesk by email).

## Non-technical assistance

The EACEA Helpdesk staff are only authorised and trained to help beneficiaries who are encountering technical problems.

If you have questions relating to non-technical issues e.g. if you have a question about the content of the eReport, please contact the programme team or the Project Officer responsible for your project. The mailbox address for the programme team will generally be published on the EACEA website on the Beneficiaries Space webpage of the programme concerned.

The following table provides some further examples of technical and non-technical questions.

<b>Technical Questions (handled by the EACEA Helpdesk)</b>	<b>Non-technical Questions (handled by the programme team)</b>
I can't save the report I created.	Project information shown are not correct
A dropdown list isn't working.	Why isn't country A in the dropdown list?
I can't attach my budget form (or other annexe/attachment).	I need help with completing my budget form.
I can't add/delete a table row that I have entered.	Why is this field mandatory?
My report freezes/crashes.	One of the partner is not listed
My report is working slowly.	What documents are required for the eReport and where do I send it?
My report won't generate the preview pdf.	I need more characters for my answer!
My report won't submit.	Where are the templates for the attachments and additional documents?
I think there is a bug in the report.	I cannot flag statistics