Technical Reporting in EU H2020 programme-funded projects

Guidelines from the EU Project Managers Forum of UiB

http://www.uib.no/en/eu-managers
Periodic reporting… Where to start?
Go to:

Click on «Reference Documents»

Click on «ONLINE MANUAL»

Or google «research participant portal european commission»
2. Scroll down to “Reports & Payment requests”

Don’t jump straight to “Periodic Reports”: read the useful and short introduction in “Reports & Payment requests” for an overview!
The following slides provide some comments and tips on the H2020 Online Manual regarding reporting and the Core Report template, based on this forum’s experience. For specific examples on how to coordinate reporting (timeline and task assignments), please return to our «Periodic Reports» page.
For Part A of the periodic technical report – also known as continuous reporting – we recommend collecting the necessary information from all partners and uploading it on the portal “yourself”* to avoid loss of control over uploaded content.

*Depending on project size and structure, the uploading may be performed by just the coordinator/manager, or this task might be distributed among relevant participants (e.g. the Dissemination Work Package leader, etc.). This should be decided and communicated at the start of the project (e.g. kick-off meeting). We recommend keeping the number of participants working on the portal to a strict minimum.

Prepare templates to collect the information you need from each partner (except for the “Summary for Publication” –see next slide).

The green “How-to” button provides a nice overview of the different sections and how to complete them. This can be useful when preparing your templates. Alternatively, you are welcome to use and/or adapt our templates, accessible under “Continuous Reporting” here: http://www.uib.no/foransatte/104414/vitenskapelig-rapportering
Use the template that will be available once the reporting period has ended or create one based on the H2020 Online Manual (pathway provided in next slide).

For H2020, remember that all beneficiaries will receive an invitation to submit their contribution to the Technical Report (in H2020) as soon as the reporting period has ended. Once again, we do not recommend that beneficiaries upload new versions of Part B due to difficulties in tracking changes and higher risk of data loss. It is better that beneficiary input be sent to the coordinator.

It is easier to complete the “Summary for Publication” of the continuous reporting (=Part A of Technical Report) last of all, after receiving input for Part B of the Technical Report. You can even request input for this specifically within the Core Report template (see how in our “coordinating reporting” examples) rather than burden your consortium with yet another separate template to fill-in.

Check the “coordinating reporting” examples on our “Periodic Reports” page.
The following slides provide some general comments to this template.
Do not focus here on deviations or how review recommendations were followed: this belongs to sections 4 and 5 of this report.

For example, refer to deliverables and the project’s open access published material as much as possible, rather than repeating this information. **CONCISE IS KEY!**

It is best (for the reviewers and yourself) to present the work progress by work package task and not by beneficiary, but remember to ensure each beneficiary’s contribution is clear and traceable.
If those providing input to the Core Report are instructed to highlight main results and progress beyond the state of the art, together with considerations on impact (including socio-economic impact and wider societal implications), this will greatly facilitate updating the relevant sections of the Summary for Publication (Part A of Periodic Technical Report / part of continuous reporting).
Annex I – Description of the action (project work)
Annex II – Estimated budget for the action
The Commission requires a very detailed explanation of use of resources. As a project manager, be aware that the Financial Report is cross checked with the Technical Report. It is thus important that the technical report in written in a way that makes cross-checking between scientific work and use of resources as clear as possible, and that the researchers for each beneficiary of the consortium are aware that they might need to give input to their financial department.

5.1 Tasks
Include explanations for tasks not fully implemented, critical objectives not fully achieved and/or not being on schedule. Explain also the impact on other tasks on the available resources and the planning.

5.2 Use of resources (not applicable for MCSA)
Include explanations on deviations of the use of resources between actual and planned use of resources in Annex 1, especially related to person-months per work package.
Include explanations on transfer of costs categories (if applicable)

5.2.1 Unforeseen subcontracting (if applicable) (not applicable for MCSA)
Specify in this section:
- the work (the tasks) performed by a subcontractor which may cover only a limited part of the project;
- explanation of the circumstances which caused the need for a subcontract, taking into account the specific characteristics of the project;
- the confirmation that the subcontractor has been selected ensuring the best value for money or, if appropriate, the lowest price and avoiding any conflict of interests.

5.2.2 Unforeseen use of in kind contribution from third party against payment or free of charges (if applicable) (not applicable for MCSA)
Specify in this section:
- the identity of the third party;
- the resources made available by the third party respectively against payment or free of charges;
- explanation of the circumstances which caused the need for using these resources for carrying out the work.
This document is based on Periodic Reporting for H2020 but it is in general applicable to FP7 also. For more details, remember to check our examples on «coordinating reporting». We welcome your comments or suggestions: eu-managers@uib.no

Thank you.