



EURESTOOLS REPORTER

MANUAL

CELTIC PROJECT REPORTING TOOL

VERSION 1

GENERAL REPORTING PROCESS

Project Progress can be reported as, so-called Work Summary (WS). The WS reporting is not mandatory but is strongly recommended for all project participants to monitor the progress in a project and to consider actions in case the progress deviates significantly from plan.

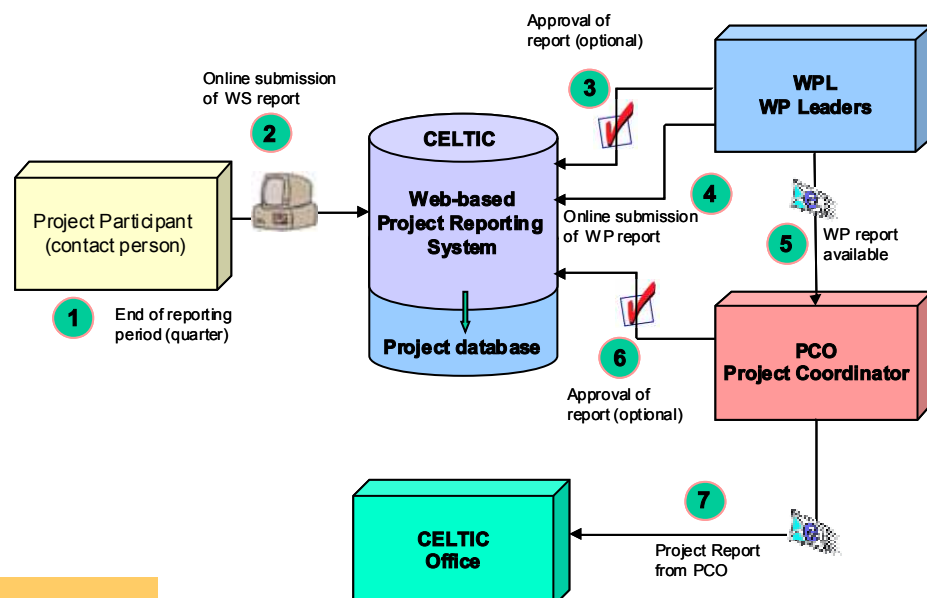
The default reporting period is per calendar quarter (i.e. each quarter ends on 31 March, 30 June, 30 September, 31 December). Note: if a project starts between two calendar quarters, the first reporting is done at the end of the next following calendar quarter. So the first WS may report on a 4 or even 5 months period.

For fast, easy and efficient reporting the Celtic Office provides the Web-based online reporting tool set "EuresTools", developed by Eurescom GmbH that significantly simplifies the reporting process. In addition the tool provides access to the project database for an immediate overview on the project progress and discrepancies between planned and current status.

The main steps in the reporting process are as follows:

1. The partner submits the WS and the WP leader approves the document (optional).
2. On the basis of the received WSs the WP leader submits a WP report (by reporting on the management WP)
3. The Project Coordinator approves the WP reports and submits an own PS report via the reporter. A separate Project Report may be produced by using the exported WS Excel tables.

The following diagram shows the roles and action for the reporting process:



Content

- ◆ General Reporting Process
- ◆ EuresTools Reporter
- ◆ Access and Main Menus
- ◆ Description of reporting functions
- ◆ Work Summary Reporting
- ◆ Reporting for WP Leaders
- ◆ Reporting for Project Coordinators
- ◆ Reports and Summaries
- ◆ Export to Excel

Annex

- ◆ Extended Support Functions

EURESTOOLS REPORTER

Access and Main Menus

The reporting tool is accessible at the link: <http://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 normal participant) your account may show different functions to access.

After successful log-in the following menus (see right) are visible:

The Main Menu shows all underlying submenus as also shown in the left menu bar:



Submit WS Report

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

WS List

This submenu shows an overview of all received WS reports and allows the selection and opening of every detailed WS report.

Missing WS

This submenu provides a table of all outstanding WS reports that are still due.

WS (un)approve

This function is only needed if the project wants to apply an approval process for WS reports from the participants by the responsible work package leaders and/ or the project coordinator. When used 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.

Features, Sitemap, Impressum

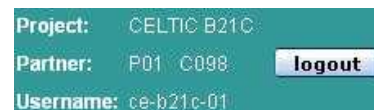
These functions are not directly used for reporting purposes. They provide additional information on new functions, a site overview and details on the developing company.

DETAILED DESCRIPTION OF REPORTING FUNCTIONS

Work Summary Reporting

For WS reporting the menu item "Submit WS Report" is selected. When submitting a WS report the reported quarter and the work package to be reported need to be selected. In the top row you should verify that your correct company ID and the correct project are shown.

Partner P01 = Individual numbering of partners in a project. Company-ID =C098. Note: The full company name is shown in the reporting sheet.



The selection and submission of the reported quarter and reported work package must be done for each WP separately. In the shown case the quarter 2 (i.e. April to June 2007) and WP2 is selected.

The selected WS report forms opens: The reporting form consists of 4 different parts:

| | | |
|-------------|-------------------------------|---------------------------------------|
| CELTIC B21C | Quarterly Work Summary Report | Reporting period (Project Months): |
| WP2 | Contractor P01 TeamCast | 04 - 06 (Quarter): Q2 07 |

Part I Activities and Results: Provide a short verbal description of the work and achievement done in the selected WP.

Session timeout after 60 minutes.
(You must save or submit the form within 60 minutes after opening)

Name of compiler Submitted on (automatically inserted)

PART I - Activities and results

| | |
|-----|---------------------------------------|
| WP | Summary of work done (in Workpackage) |
| WP2 | <input type="text"/> |

Part II Effort: In this part you should enter the amount of person months (PM) you have used for the work in that WP.

PART II - Effort (in PM)

| WP | TOTAL PM in WP (Max. 2 decimals, E.g. 0.84) | Name of all experts who have worked in Workpackage If several experts have worked in the same WP, please list name and effort for each of them. (E.g. Tom Fischer (1 PM), Maria Lopez (0.8 PM), etc.) |
|-----|--|---|
| WP2 | <input type="text"/> | <input type="text"/> |

PART III - Produced Deliverables and other Results (this quarter)

| Del# | Del ID (PD) | Planned date (latest PD) |
|------|----------------------|--------------------------|
| I | <input type="text"/> | <input type="text"/> |
| II | <input type="text"/> | <input type="text"/> |

Part III Produced deliverables and other results: In this chapter you can indicate, which deliverables were finalised in the reporter quarter. Other results may be publications, contributions to standards etc. as proposed in the list.

Publication Details

| Del# | Publication date | Confidentiality status |
|------|----------------------|--|
| I | <input type="text"/> | <input type="radio"/> Full publication <input type="radio"/> Restricted (e.g. PA) <input type="radio"/> Project confidential |
| II | <input type="text"/> | <input type="radio"/> Full publication <input type="radio"/> Restricted (e.g. PA) <input type="radio"/> Project confidential |

Part IV Assessment of work package situation: In this section you can flag the status of a project. Yellow or red flags should trigger some special attention to solve possible problems.

Click this button to add further deliverables

Other important WP achievements and publications

Type of achievement
(publication, dissemination, standardisation, patent, review, etc.)

After completing the form by adding some final comments you can choose from 4 different options:

Click this button to add further achievements

PART IV - Assessment of workpackage situation / Comments

Indicate level of your assessment:

Green flag, project running as planned

Yellow flag, minor issues, none of them critical (please specify)

Red flag, critical issues that need management actions (please specify)

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.

Issues that have an impact on the project,
(e.g. delays, re-allocation of responsibilities, new work items, amber-flag items, red-flag items, etc.).

Comments:

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

Choose one option to leave the 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.

Save as private draft: This function is used in case you are not yet able to submit the report, e.g. if other people of your company need to provide additional information. The private draft is not visible to other project partners unless it is submitted.

Cancel: This resets the whole reporting process.

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

REPORTING FOR WORK PACKAGE LEADERS

Reporting of a work package leader (WPL) is done in very much the same way as for a project participant. The only difference is that in the header row the user name is indicated as WP2, which means that the WPL of WP2 has reported. The report of the WPL is on the management WP defined in the project. This may e.g. be by WP1 or WP0 but can also be any other number as defined in the project description.

Partner: P12_C042
Username: ce-b21c-wp2

The detailed reporting process may be further specified by the project as the handling of WP reports may be preferred in different ways:

One option may be that the WPL reports only the work in the WP reporting form. This report is then used as report of the management WP. It is accessible to all partners.

Another option may be that the project participants who also report on the management WP are only requested to fill in part 1 and part 2 while part 3 and part 4 are left for the WPL in his/ her report. This avoids confusion of reported deliverables or different ratings as only one report will provide this information.

REPORTING FOR PROJECT COORDINATORS

The process is the same as for the WPL report. The report is marked in the ID field as coming from the project coordinator (PC):

Partner: P01_C098
Username: ce-b21c-pc

Additional procedure for report handling may be defined by the project as it is felt necessary. The PC may additionally produce a project report by using the exported WS Excel tables.

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 WP2 for all partners is selected the results are as follows:

Main Menu WS List

Selected Project: CELTIC B21C

Select Reporting Period start: Q1 / Jan-07-Mar-07

Select Reporting Period end: Q4 / Oct-09-Dec-09

Select Company: -- all --

Select WP: WP2

Show WS List

The data presented in the table can be selected in many different ways:

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

List of Work Summaries

[1] 20 per page

Entries found: 4

| | Partner ID | Partner shortname | WP | Reportingperiod | Assessment | Compiler | State | Updated |
|-----------------------|------------|-------------------|-----|-----------------|--|----------------------|------------------|-------------|
| <input type="radio"/> | P15 | C506 | WP2 | 01 - 03 (Q1 07) | <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> | Jean-François Helard | not yet approved | 2007-Jul-13 |
| <input type="radio"/> | P15 | C506 | WP2 | 04 - 06 (Q2 07) | <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> | Jean-François Helard | not yet approved | 2007-Jul-13 |
| <input type="radio"/> | P23 | C547 | WP2 | 01 - 03 (Q1 07) | <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> | Martin Lovell | not yet approved | 2007-Jul-13 |
| <input type="radio"/> | P23 | C547 | WP2 | 04 - 06 (Q2 07) | <input type="radio"/> <input type="radio"/> <input checked="" type="radio"/> | Martin Lovell | not yet approved | 2007-Jul-13 |

[1]

you can choose which data columns shall be shown:

Select Tablecolumns

Select All

Project Partner ID

Partner shortname Partner

WP Reportingperiod

Total PM Summary part 1+2

Subcontracts Equipment

Other costs Deliverables

Achievements Cost Model

unfunded effort unfunded effort comments

Assessment Comments

Compiler State

Created Updated

Approved Approver

EXPORT TO EXCEL

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 or for reports to PAs, etc.

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.

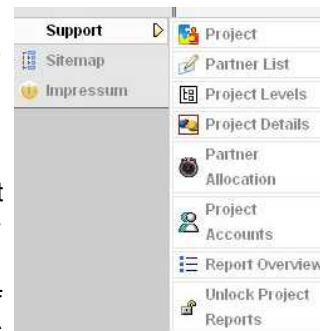
ANNEX

EXTENDED SUPPORT FUNCTIONS (UPON REQUEST ONLY)

The reporting tool offers also a number of very powerful extended support functions. These functions are not shown in the default settings. However, if the project coordinators would like to make use of these functions they can be implemented.

With the extended functions a project can be adjusted to changes that, generally, occur during project life. Since the Celtic Office will only assist in setting up the initial reporting data further changes can only be considered for reporting if the PC updates that data field.

Warning: Several support function have impact on the overall settings of the project reporting. These settings shall only be changed in case it is absolutely necessary. In case of doubts please abstain for changes or ask the Celtic Office for information. By default, the most critical functions are greyed and cannot currently be activated by the coordinator.



The Support menu offers the following additional functions:

Project

This item defines the project. This function is de-activated for coordinator.

Partner List

This menu item becomes important if you need to add new partners to your project or if partners left the project. Also this menu is deactivated as it requires also password assignment. Therefore Office help is required.

Project Levels

This is also a menu that, generally, should not be changed once a project has been set-up. It allows to report on different levels, e.g. not only by WP but also by Task, etc. These additional levels are also called "children". This menu is also de-activated for the time being.

Project Details

Again this is a menu that should not be changed unless there is a need to re-structure the project, e.g. by adding a new work package. This menu is also de-activated for the time being.

Partner Allocations

This menu item is probably the most frequently used when modifying planned data in the project. The menu allows re-planning work allocation, considering delays, or re-allocating work to other partners.

For work allocation the reporting tool considers two different possibilities:

1) Linear work allocation per WP ("old type")

This menu distributes the allocated work per partner and WP linear over the whole duration of a WP. This simplifies the data allocation considerably but has the disadvantage that reported work may not always correspond to the indicated plan figures. It is strongly recommended, if no detailed budget and effort reporting is requested by the project, to use this menu for your reporting data.

| WP | P01 | P02 | P03 | P04 | P05 | P06 | P07 | P08 | P09 | P10 | WP | P11 | P12 | P13 | Σ |
|-----|-------|-------|-------|-------|-------|-------|------|-------|------|-------|-----|-------|-------|------|--------|
| WP1 | 18.00 | 1.00 | 4.32 | 4.00 | 2.00 | | 4.80 | | | 4.00 | WV1 | 2.00 | 2.40 | 1.50 | 44.02 |
| WP2 | 24.00 | 4.00 | | 6.00 | 3.00 | | 4.80 | 15.00 | 4.00 | 3.00 | WV2 | 11.00 | 3.60 | 3.00 | 81.4 |
| WP3 | 48.00 | 16.10 | 17.28 | 24.00 | 18.00 | 8.45 | | | 7.50 | 16.00 | WV3 | 16.00 | 3.60 | 6.00 | 180.93 |
| WP4 | 18.00 | 7.00 | | | | | | 20.00 | | 25.00 | WV4 | 19.00 | 4.80 | | 93.8 |
| WP5 | 36.00 | 5.00 | 17.28 | 27.00 | 16.00 | 9.60 | | | 6.50 | 5.00 | WV5 | 9.00 | 30.00 | 1.50 | 162.88 |
| WP6 | 24.00 | 7.00 | 4.32 | 11.00 | 3.00 | | 8.40 | 10.00 | | 3.00 | WV6 | 6.00 | 2.40 | 6.00 | 85.12 |
| Σ | 168 | 40.1 | 43.2 | 72 | 42 | 18.05 | 18 | 45 | 18 | 56 | | 63 | 46.8 | 18 | |

The table is easily set-up by entering the assigned effort figures (in person month) in the table fields. When pressing "Allocate" the figures are assigned to each partner.

2) Detailed work allocation per month/ WP, and partners ("multiple type")

The screenshot shows the 'Partner Allocation' interface. At the top, there are navigation buttons for 'Main Menu', 'Support', and 'Partner Allocation'. Below this is a 'switch allocation type' button and a 'Selected Project' field. The main area is titled 'Select Company' and contains a grid for project 'P01 (C006)'. The grid has columns for months 0 to 24 and a total column (Σ). Rows represent work packages (WP1-WP6). Budget values are shown in brackets, and allocation periods are indicated by colored bars. A legend at the bottom explains the symbols used in the grid.

| Project | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | Σ |
|---------|---|---|---|---|---|---|---|---|---|---|----|----|----|----|----|----|----|----|----|----|----|----|----|----|----|-----|
| WP1 | | | | | | | | | | | | | | | | | | | | | | | | | | 18 |
| WP2 | | | | | | | | | | | | | | | | | | | | | | | | | | 24 |
| WP3 | | | | | | | | | | | | | | | | | | | | | | | | | | 48 |
| WP4 | | | | | | | | | | | | | | | | | | | | | | | | | | 18 |
| WP5 | | | | | | | | | | | | | | | | | | | | | | | | | | 36 |
| WP6 | | | | | | | | | | | | | | | | | | | | | | | | | | 24 |
| | | | | | | | | | | | | | | | | | | | | | | | | | | 468 |

Legend:

- budget values are between brackets (e.g. [6.00])
- outside planned task start and end date
- currently no budget allocated
- budget allocated with start and enddate of allocation
- budget allocated outside current partner join- and leave-date

This menu allows a more detailed allocation per partner on a per month basis. For Celtic these reporting details are most commonly not required. However, it is left to the project consortium to decide on this reporting type.

When selecting this function you can assign for each company and work package the work per month during the whole project.

Project Accounts

This menu is deactivated and reserved for the Celtic Office. It allows assigning for new members new access accounts for reporting. The menu can only be used to check existing accounts of all partners or to make an account inactive e.g. in case a partner left the project. In this case the partner can no longer access the reporting data.

Report Overview

This menu is the same as the standard WS List menu. It provides access to all submitted reports.

Unlock Project reports

This menu is only needed in case the project has decided to apply an approval process for the reports. By default an approved report cannot be changed any longer by the submitting partner. However, it may happen in case of mistakes or incorrect reported data, that an already approved report should be changed again. In this case the reporting partner should contact the PC and ask to unlock the report again.