



Smart
Energy
Systems
ERA-Net

ERA-Net Smart Energy Systems

Project Reporting Manual

For annual reports of 2022 and final reports in 2023

Purpose of the reporting tool

The reporting tool enables you to:

- Do the annual reporting of your ERA-Net SES project on initiative level
- Administrate your project reports
- View submitted project reports
- Develop and submit a final project report based on your annual reports

Requirements for the reporting tool

Software requirements

Open expera with one of the following internet browsers:

- Microsoft edge (recommended)
- Microsoft Internet Explorer 8+ (recommended)
- Google Chrome
- Mozilla Firefox

Project reporter requirements

- Registered on expera as an expert (see [expera user manual](#))
- Listed as project reporter of your project (via request to knowledgecommunity@eranet-smartenergysystems.eu with project manager in cc)

Requirements for the reporting tool

Technical requirements

- Various project reporters can contribute to the report of a project.
- However, it is **NOT** possible to **work in parallel at the same** time within the same report - **changes might be lost**. Please schedule with your fellow reporters who will be working in the tool at which time.

Important – Note before starting the reporting

- **Preview of report items:** In order to inform your project team about the information to be collected, previews of the items to be included in your report are available:
[RegSys Joint Call 2018 \(annual/final report\)](#) // [MICall19 Joint Call 2019 \(annual/final report\)](#) // [EnerDigit Joint Call 2020 \(annual report\)](#).
Please note: Only the information entered in the respective chapters of the reporting tool on expera qualifies as part of the submitted report. The preview document or any documents based on it cannot be processed.
- **Did any important changes occur regarding project partners (removal / replacement / addition), the timeline (extension of runtime) or similar?** Please notify us via callmanagement@eranet-smartenergysystems.eu with a filled in [project change request](#).

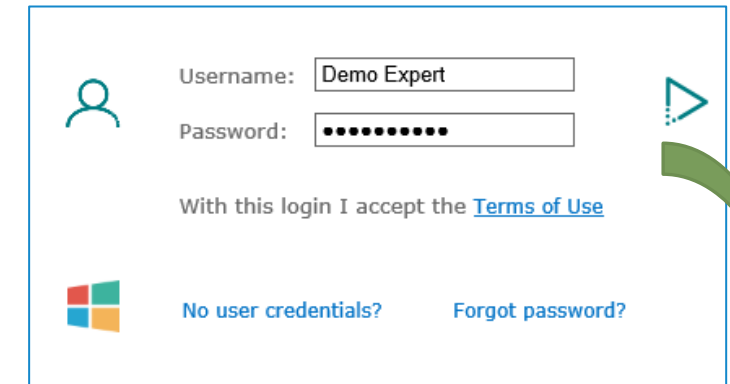




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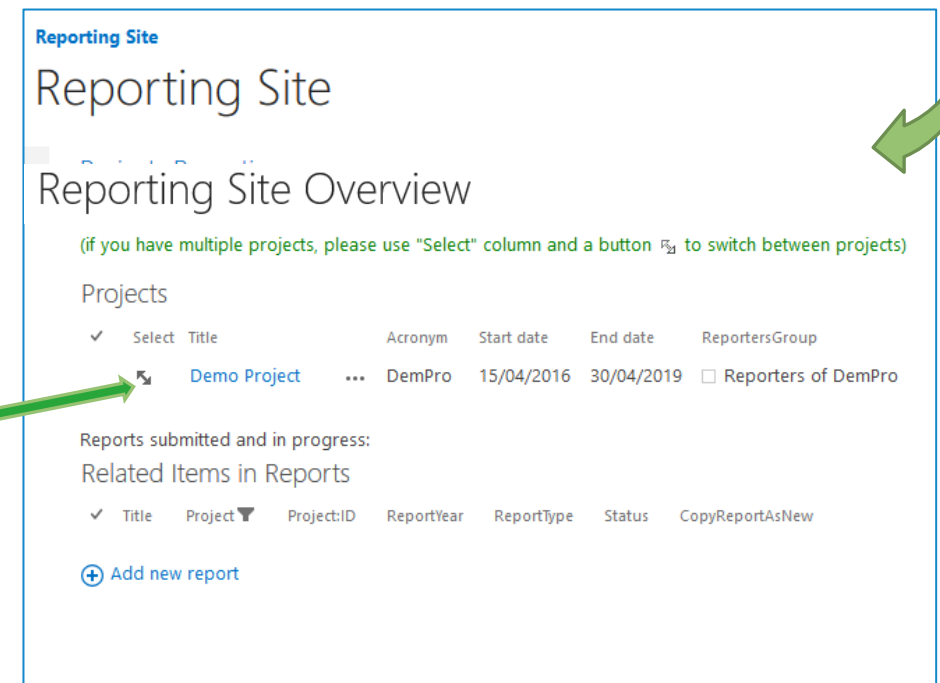
Using the Reporting Tool

Enter the reporting site

- Open the expera reporting site (<https://expera.smartgridsplus.eu/reports>)
- Log in with your user credentials
- You will arrive at the reporting site of your project. If access to the reporting page is denied, you are not yet listed as project reporter. In this case, please send an e-mail to knowledgecommunity@eranet-smartenergysystems.eu with your project manager in cc.
- If you have multiple projects, select one by clicking on the arrow in the column "select"





 Username:
 Password:
 With this login I accept the [Terms of Use](#)
 [No user credentials?](#) [Forgot password?](#)



Reporting Site

Reporting Site Overview

(if you have multiple projects, please use "Select" column and a button  to switch between projects)

✓ Select	Title	Acronym	Start date	End date	ReportersGroup
	Demo Project	DemPro	15/04/2016	30/04/2019	<input type="checkbox"/> Reporters of DemPro

Reports submitted and in progress:
Related Items in Reports

✓ Title	Project	Project:ID	ReportYear	ReportType	Status	CopyReportAsNew
---------	---------	------------	------------	------------	--------	-----------------

[+ Add new report](#)


Add a new report

- For a new report, click (+) Add new report.
- There are **different options** for new reports described on the following pages:
- page 9: Add a first **annual report** for a project ([Joint Call 2020 projects](#))
 - page 10: Add an **additional annual report** with the option to import data from a previous report ([Joint Call 2018 and 2019 projects](#))
 - page 11: Add a **final report** ([Joint Call 2018 and 2019 projects](#))


Reporting Site

Reporting Site Overview

[Projects Reporting page](#)



(if you have multiple projects, please use "Select" column and a button  to switch between projects)

Projects

✓	Select	Title	Acronym	Start date	End date	ReportersGroup
	Demo Project	...	DemPro	15/04/2016	30/04/2019	<input type="checkbox"/> Reporters of DemPro

Reports submitted and in progress:

Related Items in Reports

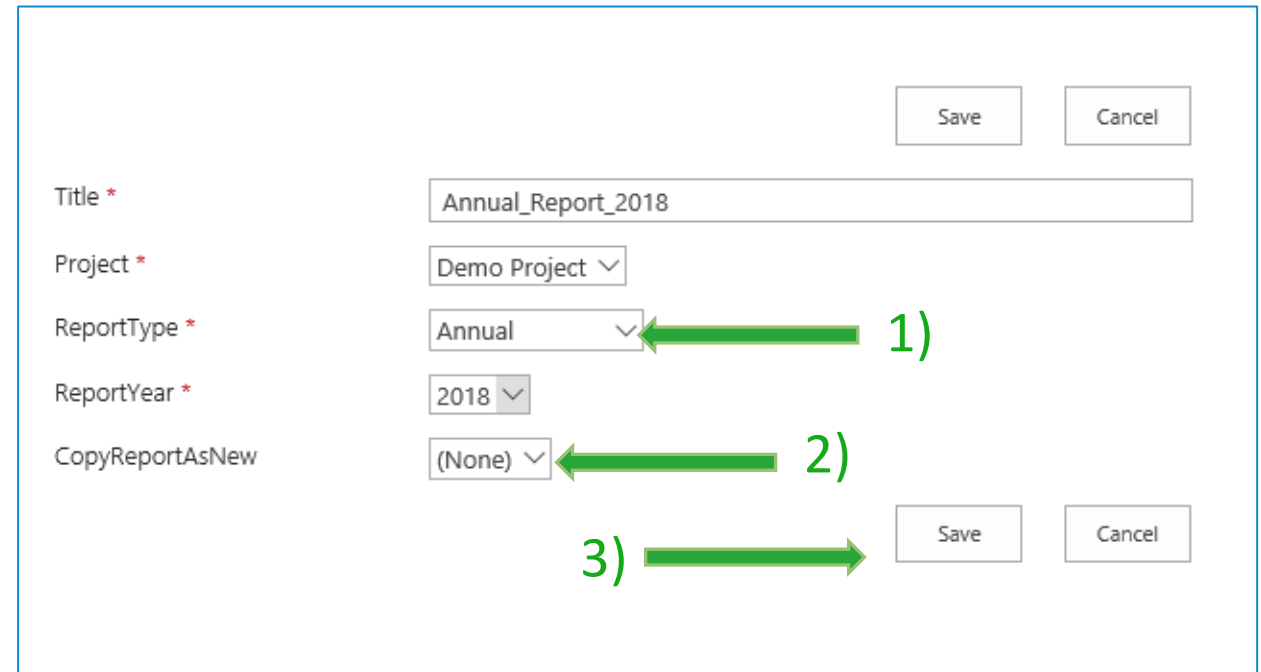
✓	Title	Project 	Project:ID	ReportYear	ReportType	Status	CopyReportAsNew
							

[+ Add new report](#)



For a first annual report: enter your project report details

- After clicking (+) Add new report:
 - 1) choose your ReportType: Annual
(the title and reporting year will be generated automatically)
 - 2) set CopyReportAsNew: None
(for your first report only)
 - 3) click “save”



The screenshot shows a web form for adding a new report. The form fields are: Title * (text input), Project * (dropdown), ReportType * (dropdown), ReportYear * (dropdown), and CopyReportAsNew (dropdown). The values entered are: Title: Annual_Report_2018, Project: Demo Project, ReportType: Annual, ReportYear: 2018, and CopyReportAsNew: (None). There are two 'Save' and 'Cancel' buttons, one at the top right and one at the bottom right. Green arrows and numbers 1, 2, and 3 point to the ReportType, CopyReportAsNew, and the bottom Save button respectively.

Title *	Annual_Report_2018
Project *	Demo Project ▾
ReportType *	Annual ▾ ← 1)
ReportYear *	2018 ▾
CopyReportAsNew	(None) ▾ ← 2)
	3) → Save Cancel

For an additional annual report: import data from previous report

For a consecutive annual report, you can import data from the prior year by clicking “Copy as new” in the list of reports or selecting a report in “CopyReportAsNew” after adding a new report.

Projects Reporting page

(if you have multiple projects, please use "Select" column and a button to switch between projects)

Projects

✓	Select	Title	Acronym	Start date	End date	ReportersGroup	
		Demo Project	...	DemPro	15/04/2016	30/04/2019	<input type="checkbox"/> Reporters of DemPro

Reports submitted and in progress:

Related Items in Reports

✓	Title	Project	Project:ID	ReportYear	ReportType	Status	CopyReportAsNew
	DEMO Annual report 2016	...	Demo Project	30	2016	Annual	Submitted Copy as new

Save Cancel

Title * Annual_Report_2018

Project * Demo Project

ReportType * Annual

ReportYear * 2018

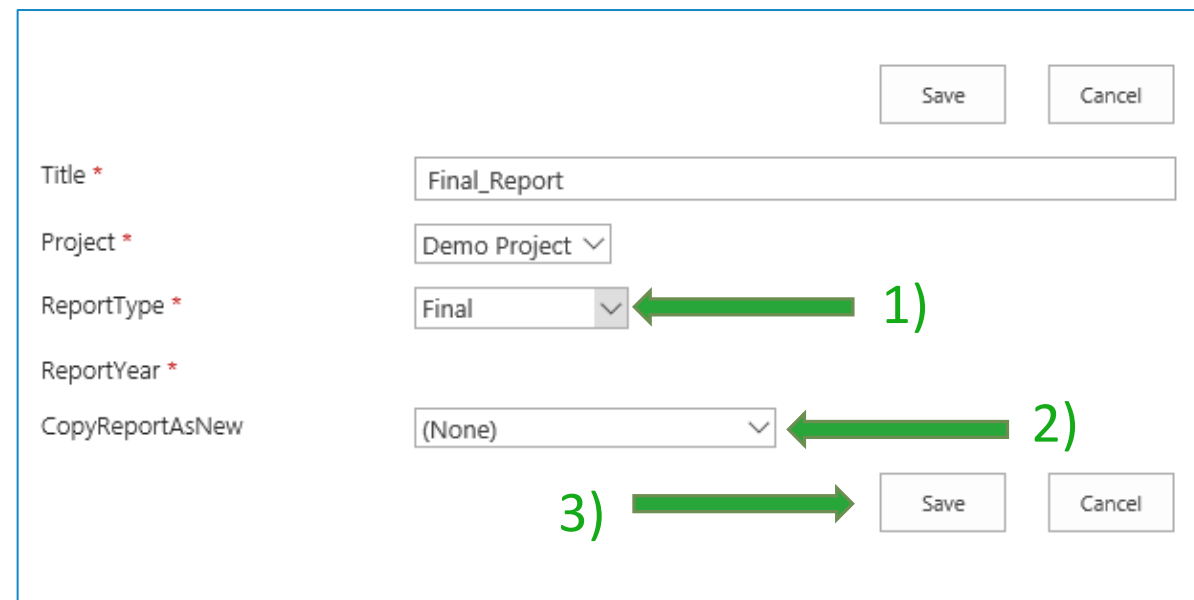
CopyReportAsNew DemPro_AnnualReport_2018

Save Cancel

Your new report will be pre-filled with data of the previous report to be adjusted to the current status. Attachments are automatically copied to the new report (see also slides 16-19).

For a final report

- After clicking (+) Add new report:
 - 1) choose the ReportType: Final
(the title and reporting year will be generated automatically)
 - 2) set CopyReportAsNew:
To import data from last year's project report as a starting point, select it
 - 3) click "save"




The screenshot shows a form for creating a new report. The fields are: Title * (text input: Final_Report), Project * (dropdown: Demo Project), ReportType * (dropdown: Final), ReportYear * (dropdown: empty), and CopyReportAsNew (dropdown: (None)). There are two 'Save' and 'Cancel' buttons. Green arrows and numbers 1, 2, and 3 indicate the steps: 1) points to the ReportType dropdown, 2) points to the CopyReportAsNew dropdown, and 3) points to the bottom 'Save' button.

Edit your report


- After adding a report, it is listed on the project reporting page as a Draft
- If the report is not listed immediately, refresh the project reporting page (reload or F5)
- To fill and submit the report, click on the title of your report

Reporting Site Overview

Projects Reporting page

(if you have multiple projects, please use "Select" column and a button  to switch between projects)


Projects


✓ Select	Title	Acronym	Start date	End date	ReportersGroup	
	DEMO PROJECT	...	DEMO	25/01/2017	25/01/2019	<input type="checkbox"/> Reporters of DEMO

Reports submitted and in progress:

Related Items in Reports

✓	Title	ReportYear	ReportType	Status	Attachments	AddAttachments	CopyReportAsNew	Project	ProjectID
<input checked="" type="checkbox"/>	DemPro_AnnualReport_2018	...	2018	Annual	Draft	Add attachments	Copy as new	Demo Project	30

 Add new report

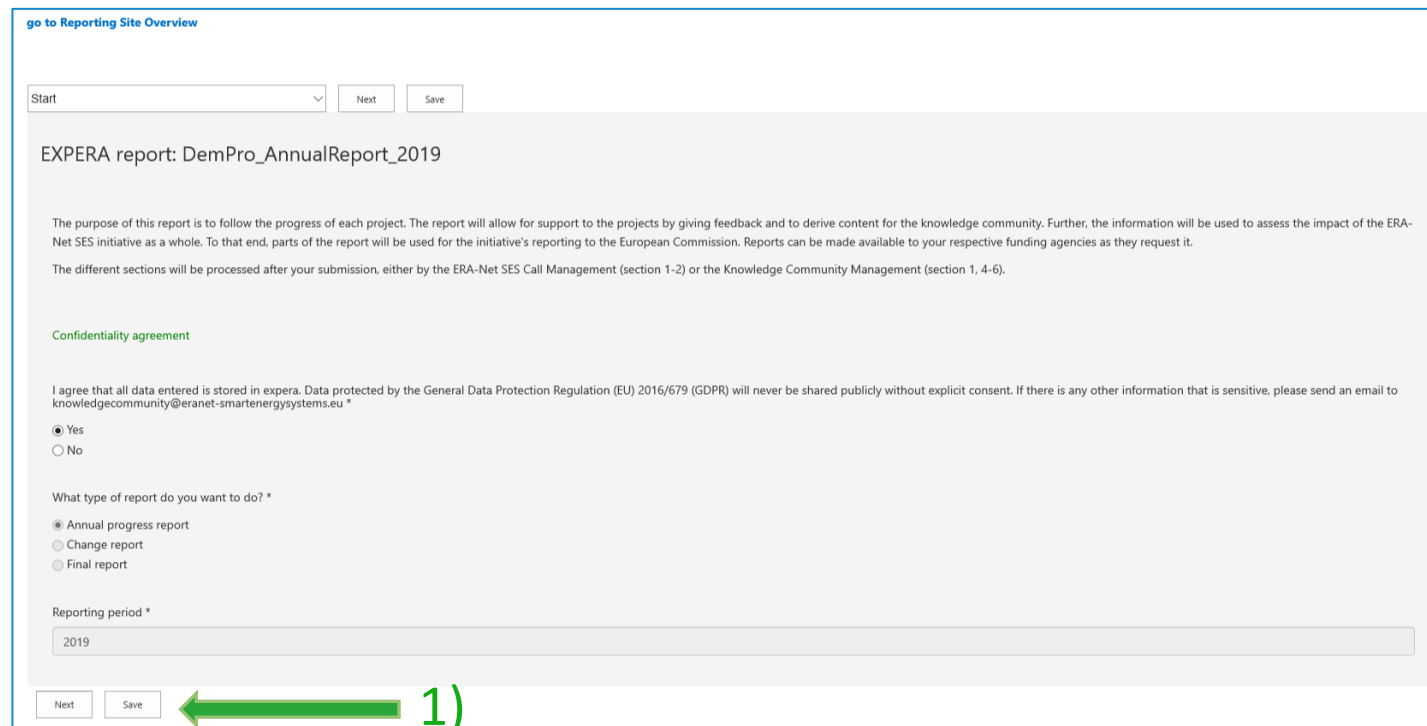


Agree to the terms of use

- Read the information about the use of the report
- Confirm the confidentiality agreement and the report type (see picture)

For this page and all further pages:

- Don't forget to press save prior to closing your browser or tab. After saving, you can exit the report, edit and submit it later.
- All fields marked with * are mandatory fields. Proceeding to the next reporting page is not possible before adding information.



go to Reporting Site Overview

Start

EXPERA report: DemPro_AnnualReport_2019

The purpose of this report is to follow the progress of each project. The report will allow for support to the projects by giving feedback and to derive content for the knowledge community. Further, the information will be used to assess the impact of the ERA-Net SES initiative as a whole. To that end, parts of the report will be used for the initiative's reporting to the European Commission. Reports can be made available to your respective funding agencies as they request it.

The different sections will be processed after your submission, either by the ERA-Net SES Call Management (section 1-2) or the Knowledge Community Management (section 1, 4-6).

Confidentiality agreement

I agree that all data entered is stored in expera. Data protected by the General Data Protection Regulation (EU) 2016/679 (GDPR) will never be shared publicly without explicit consent. If there is any other information that is sensitive, please send an email to knowledgecommunity@eranet-smartenergysystems.eu

Yes
 No

What type of report do you want to do? *

Annual progress report
 Change report
 Final report

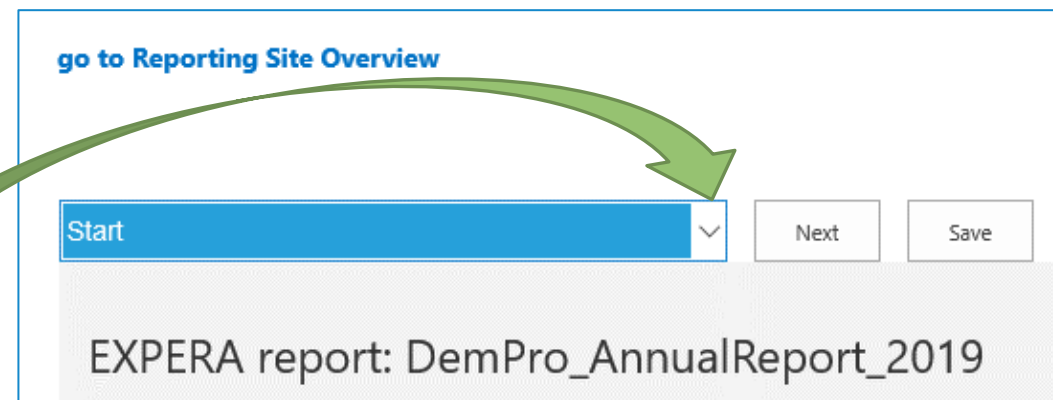
Reporting period *

2019

← 1)

Navigation in the reporting tool

- After completing your project information, navigate between the report pages by using the buttons
 - **“Previous”** to get to the previous page
 - **“Next”** to get to the following page
 - **Select** the section you would like to work on in the dropdown menu
- With the button **“Save”**, the content can be saved and complemented in a later stage
- To get to the overview of the reporting page and existing reports, click **“go to Reporting Site Overview”** (upper left corner)



Complement report information

The triangle next to text boxes allows to adjust its size for better overview when adding more content

Milestones	Year (planned)	Quarter (planned)	Year achieved	Quarter achieved	Comment	
e.g. M1	<input type="text"/>	Ch ▾	<input type="text"/>	CI ▾	<input type="text"/>	<input type="button" value="Remove"/>

Milestones	Year (planned)	Quarter (planned)	Year achieved	Quarter achieved	Comment	
e.g. M1	<input type="text"/>	Ch ▾	<input type="text"/>	C ▾	<input style="height: 100px;" type="text"/>	<input type="button" value="Remove"/>

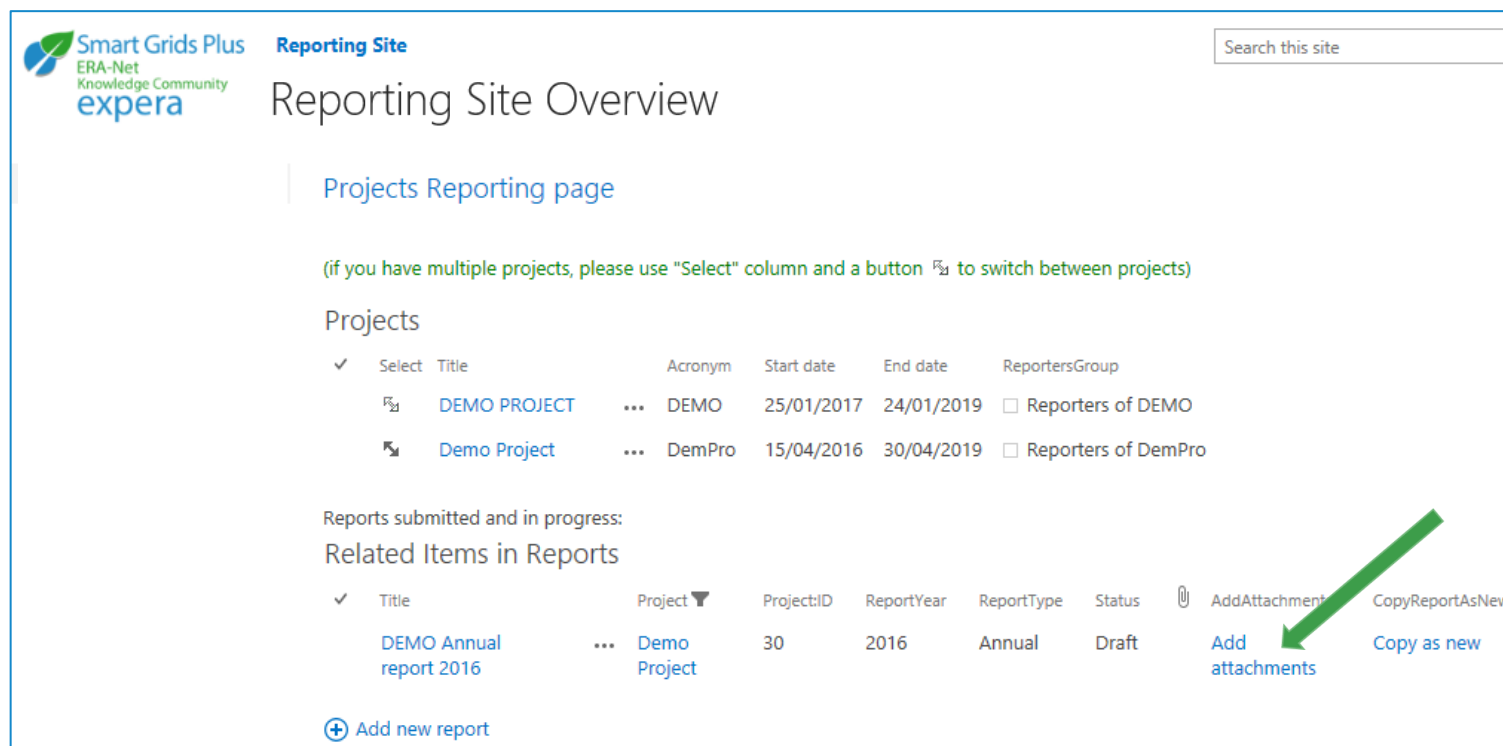
Add background documentation to a report (I)

- **Please upload** all relevant public documents:
 - public deliverable(s)
 - public (final) report(s)
 - publications
 - filled project factsheet (see template for [Joint Call 2018](#), [Joint Call 2019](#) and [Joint Call 2020](#))
 - other relevant public documents (e.g. other dissemination reports, (peer-reviewed) papers)
- **For final reports additionally:**
 - filled finalized project factsheet (see templates above)
 - filled finalized projects' template for dissemination (see template [here](#))
- **Please note:**
Public documents should also be added to your project profile in the [expera project database](#)



Add background documentation to a report (II)


- Click on 'add attachment' in the row of the respective report on the reporting site (<https://expera.smartgridsplus.eu/reports>)
- Note: Attachments can only be added or removed before submitting the report





Smart Grids Plus ERA-Net Knowledge Community expera Reporting Site

Reporting Site Overview

Projects Reporting page


(if you have multiple projects, please use "Select" column and a button  to switch between projects)


Projects

✓ Select	Title	Acronym	Start date	End date	ReportersGroup
	DEMO PROJECT	...	DEMO	25/01/2017	24/01/2019 <input type="checkbox"/> Reporters of DEMO
	Demo Project	...	DemPro	15/04/2016	30/04/2019 <input type="checkbox"/> Reporters of DemPro

Reports submitted and in progress:

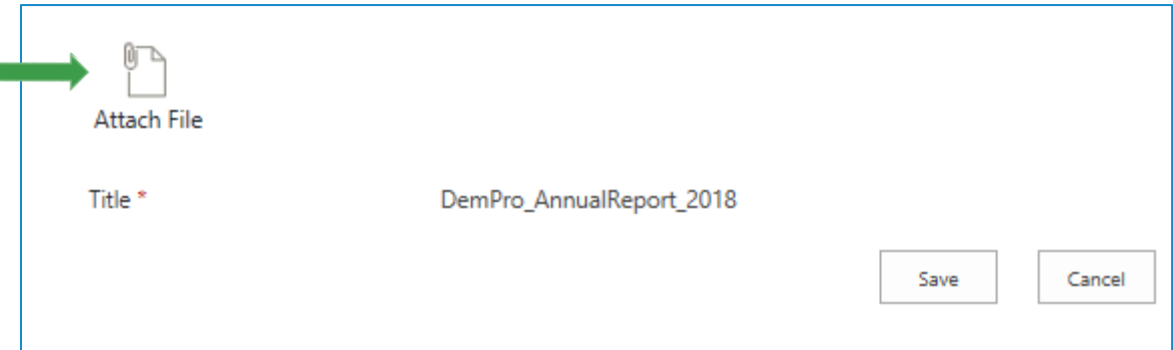
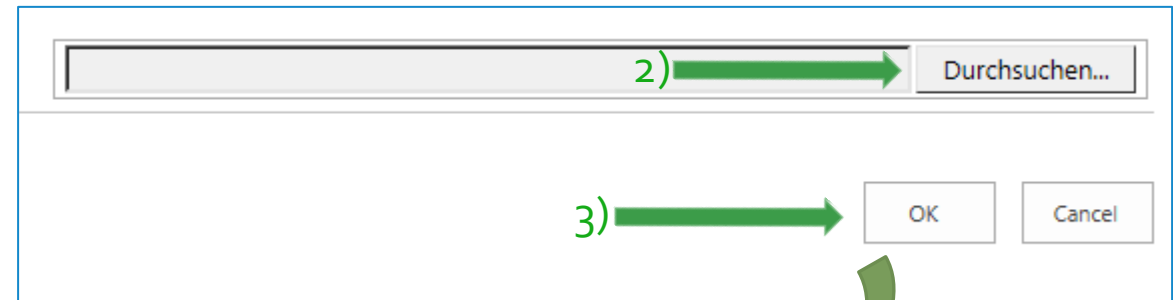
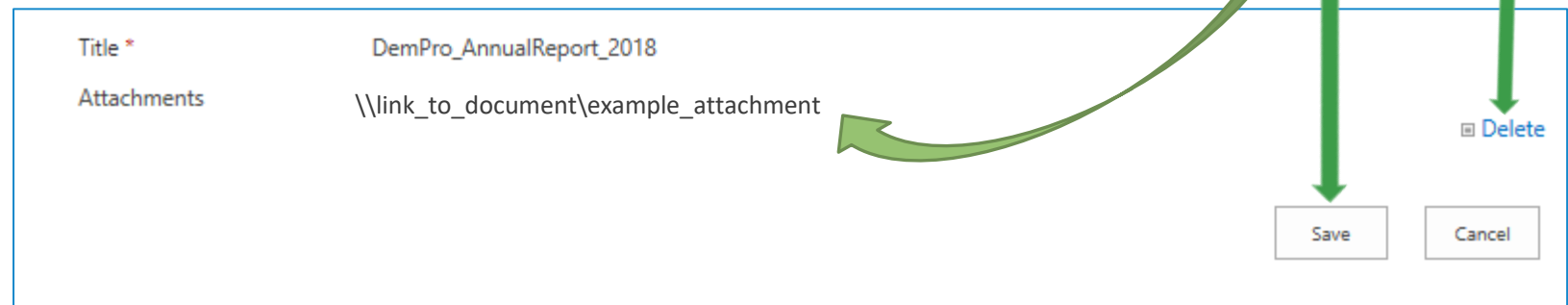
Related Items in Reports

✓	Title	Project ▼	ProjectID	ReportYear	ReportType	Status	 AddAttachment	CopyReportAsNew	
	DEMO Annual report 2016	...	Demo Project	30	2016	Annual	Draft	Add attachments	Copy as new

 Add new report

Add background documentation to a report (III)

- 1) Click "Attach File" in the menu
- 2) Browse for the file you would like to upload
- 3) Click "ok". The link to the uploaded document will show up on the subsequent window
- 4) Click on 'save' to add the document as attachment or 'delete' to delete the file






Add background documentation to a report (IV)


- View uploaded documents under ‘add attachments’
- Upload further documents by repeating the previous steps

Reporting Site Overview

[Projects Reporting page](#)


(if you have multiple projects, please use "Select" column and a button  to switch between projects)

Projects


✓ Select	Acronym	Title	Start date	End date	ReportersGroup
	DemPro	Demo Project	15/04/2016	30/04/2019	<input type="checkbox"/> Reporters of DemPro

Reports submitted and in progress:

Related Items in Reports

✓	Title	ReportYear	ReportType	Status	Attachments	AddAttachments	CopyReportAsNew	Project	ProjectID	
	DemPro_AnnualReport_2018	...	2018	Annual	Submitted		View attachments	Copy as new	Demo Project	30

[Add new report](#)

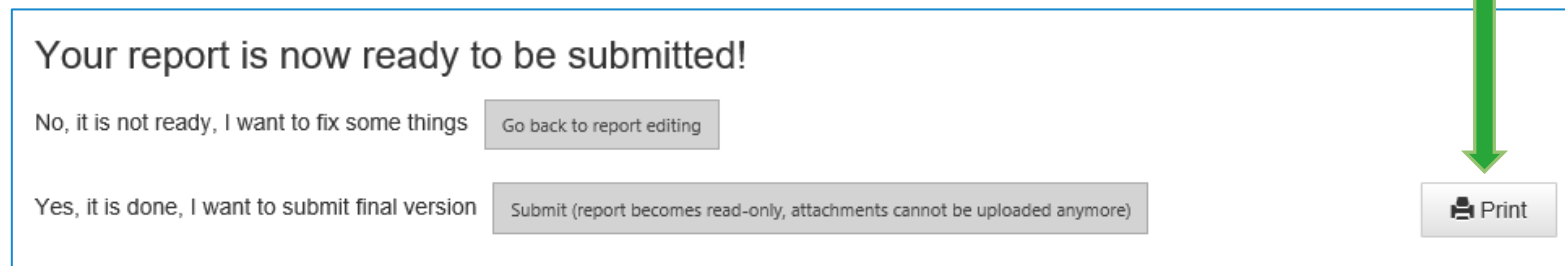
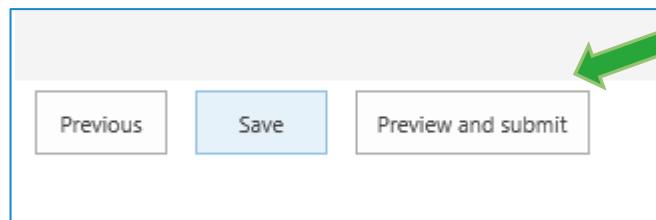


- **Please note:**
Public documents should also be added to your project profile in the [expera project database](#)



Preview, print and submit the report

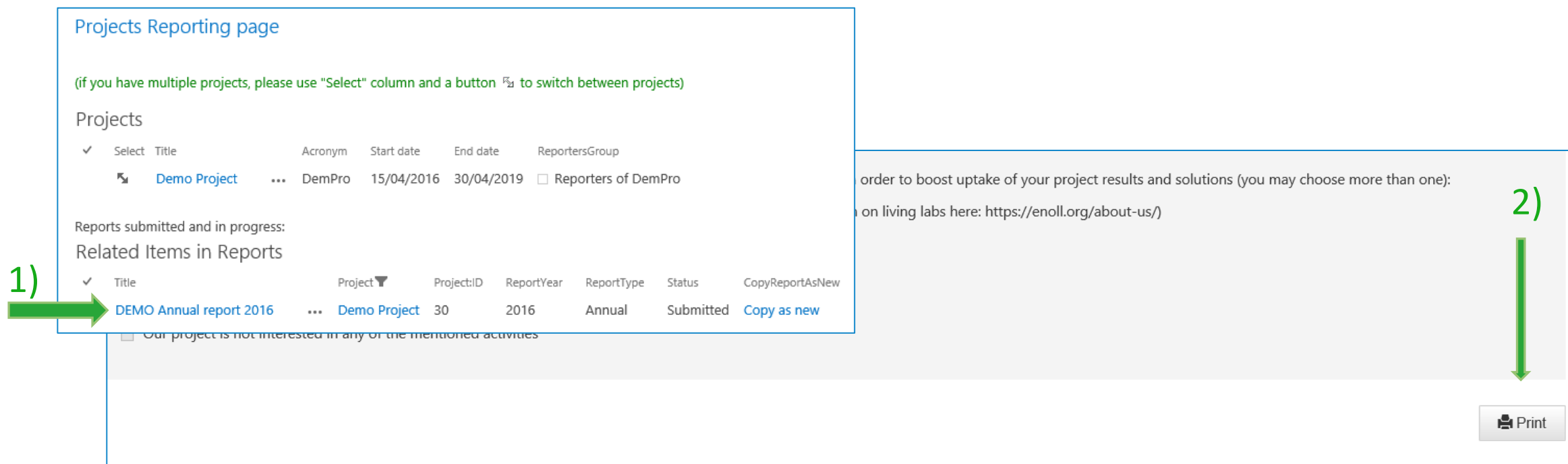
- 1) Once the report has been completed, it must be submitted and confirmed.
To do so, click “preview and submit” on the last reporting page
- 2) Click “print” to preview and print a PDF or paper copy of the report prior to submission
- 3) Click “submit (report becomes read-only, attachments cannot be uploaded anymore)” to submit the report. After clicking this button, you cannot adjust the report nor its attachments anymore.



Download a PDF of the submitted report


After submitting your report, a PDF version can be downloaded.

- 1) Click on the title to open your submitted report on the reporting page
- 2) Scroll to the bottom of the report and click “print”




The screenshot shows the 'Projects Reporting page' interface. A green arrow labeled '1)' points to the title 'DEMO Annual report 2016' in the 'Related Items in Reports' table. A second green arrow labeled '2)' points to the 'Print' button at the bottom right of the page.

Projects Reporting page



(if you have multiple projects, please use "Select" column and a button  to switch between projects)

Projects

✓ Select	Title	Acronym	Start date	End date	ReportersGroup	
	Demo Project	...	DemPro	15/04/2016	30/04/2019	<input type="checkbox"/> Reporters of DemPro

Reports submitted and in progress:

Related Items in Reports

✓	Title	Project 	Project:ID	ReportYear	ReportType	Status	CopyReportAsNew	
	DEMO Annual report 2016	...	Demo Project	30	2016	Annual	Submitted	Copy as new

Our project is not interested in any of the mentioned activities

order to boost uptake of your project results and solutions (you may choose more than one):
 on living labs here: <https://enoll.org/about-us/>

Print

If you have technical questions or questions regarding sections 3-7 in the reporting, please contact

Support Team of ERA-Net Smart Energy Systems:

Contact: Katharina Reffel and Alphin Tom

E-mail: knowledgecommunity@eranet-smartenergysystems.eu

If you have questions regarding sections 1-2 in the reporting, please contact:

Call Management of ERA-Net Smart Energy Systems:

Contact: Nordic Energy Research

E-mail: callmanagement@eranet-smartenergysystems.eu

Funding Partners



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This initiative has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreements no. 646039, 775970 and 883973.



ADEME



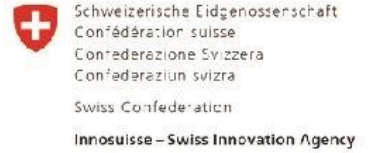
Agence de l'Environnement
et de la Maîtrise de l'Énergie



FOND ZA ZAŠTITU OKOLIŠA I
ENERGETSKU UČINKOVITOST



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www.energy.gov.il



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for Research and Development

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State of the Art



Schweizerische Eidgenossenschaft
Confédération suisse
Confederazione Svizzera
Confederaziun svizra

Swiss Federal Office of Energy SFOE



Scottish Enterprise



seaI SUSTAINABLE
ENERGY AUTHORITY
OF IRELAND



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EUDP

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Demonstration Programme



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SCIENCE & TECHNOLOGY
Ministry of Science and Technology
Government of India



TÜBİTAK



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