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

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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)

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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.

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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

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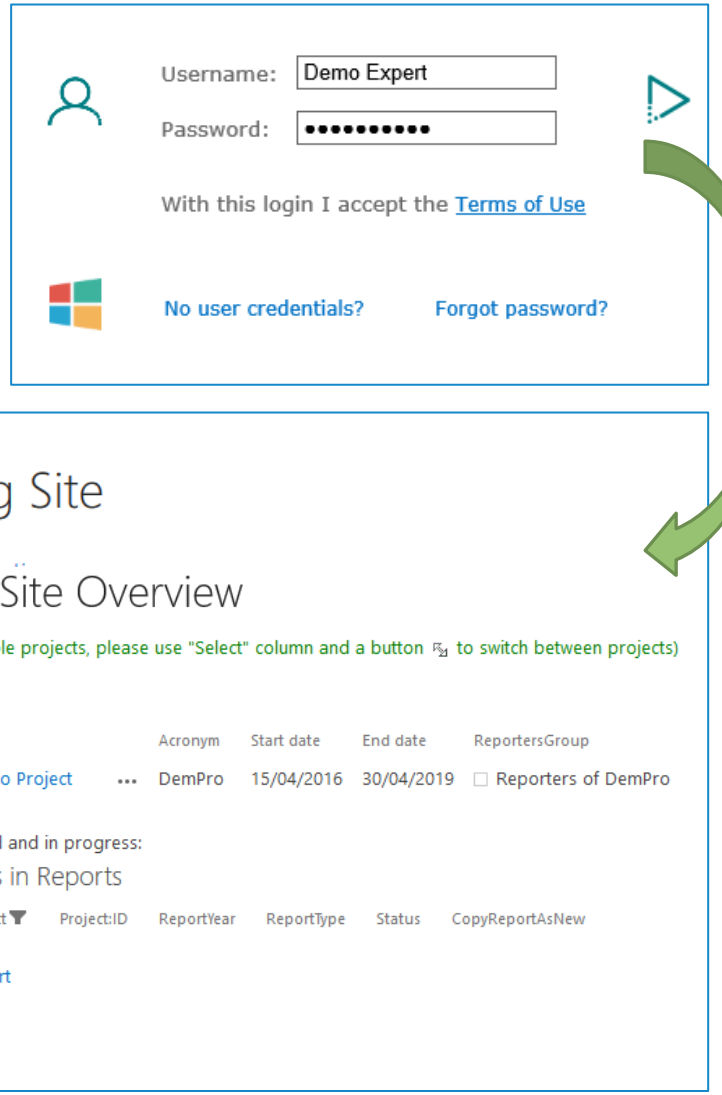
Enter the reporting site

- 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”



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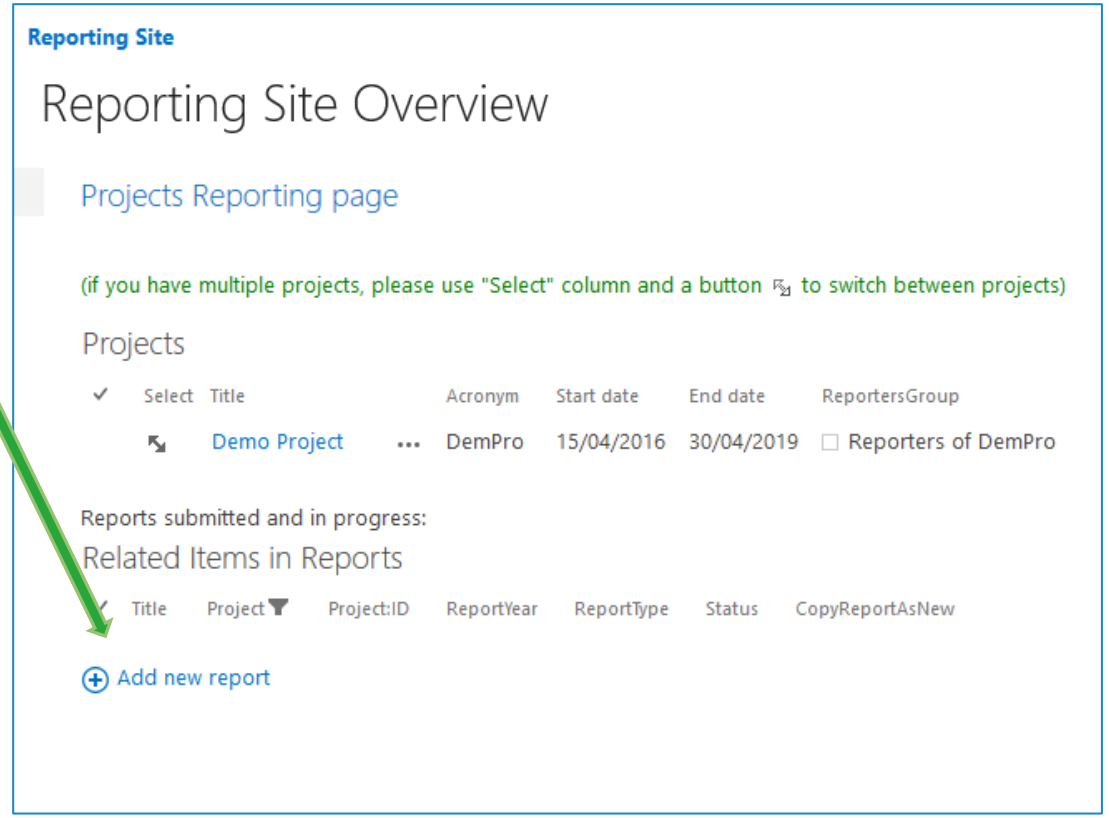
Add a new report

- 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)



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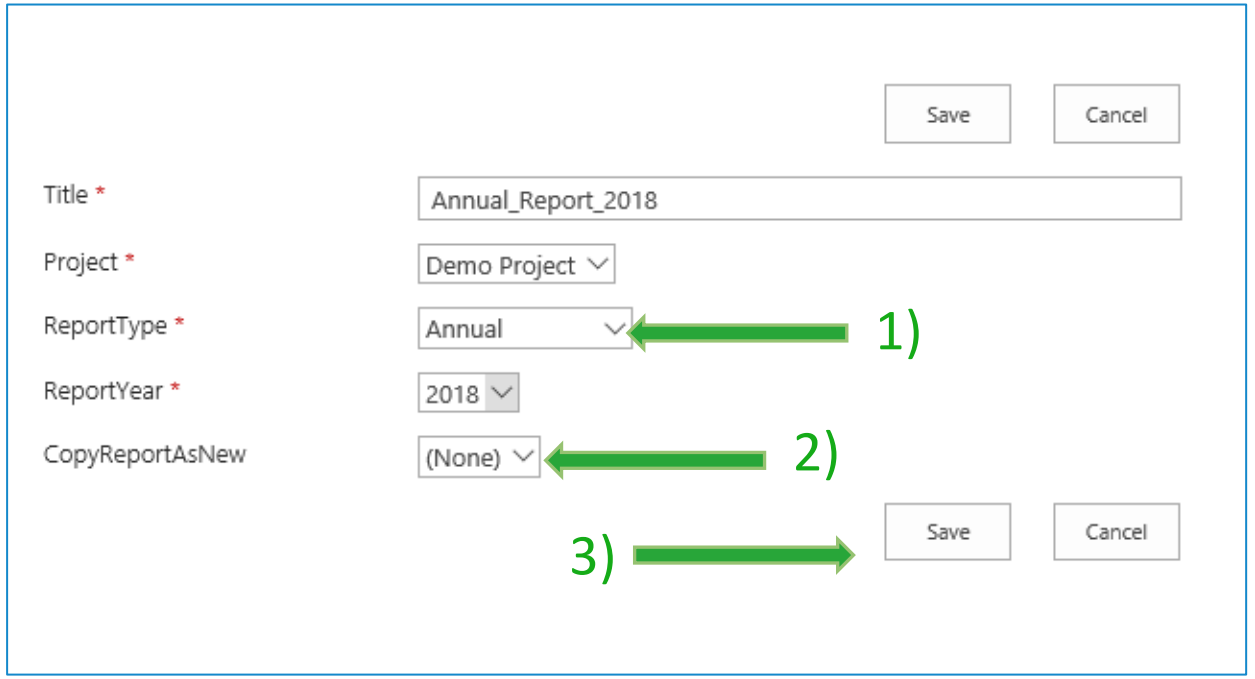
For a first annual report: enter your project report details

- 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”



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For an additional annual report:
import data from previous report

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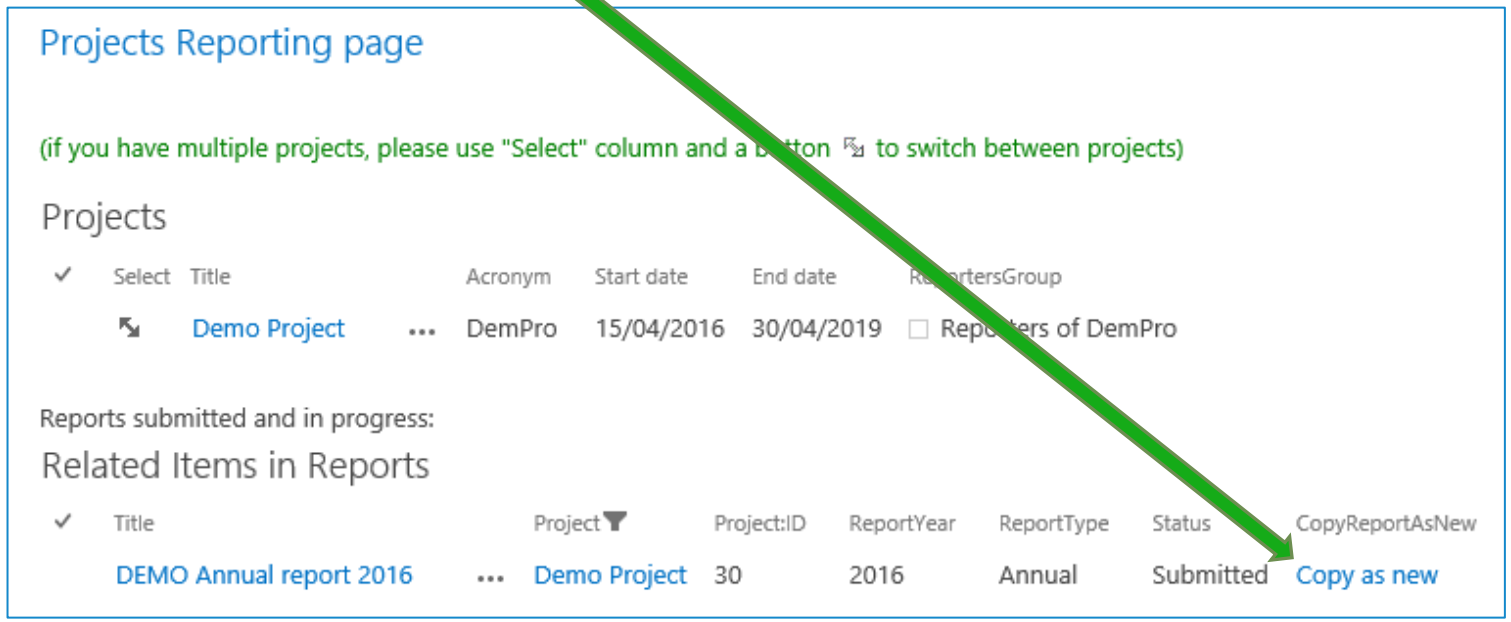
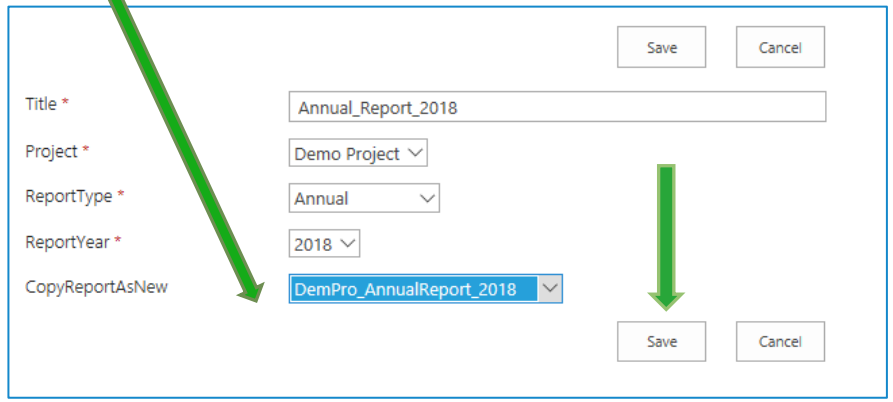
For a consecutive annual report, you can import data from the prior year by clicking “Copy as new” in the list of reports or selecting a report in “CopyReportAsNew” after adding a new report.





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).

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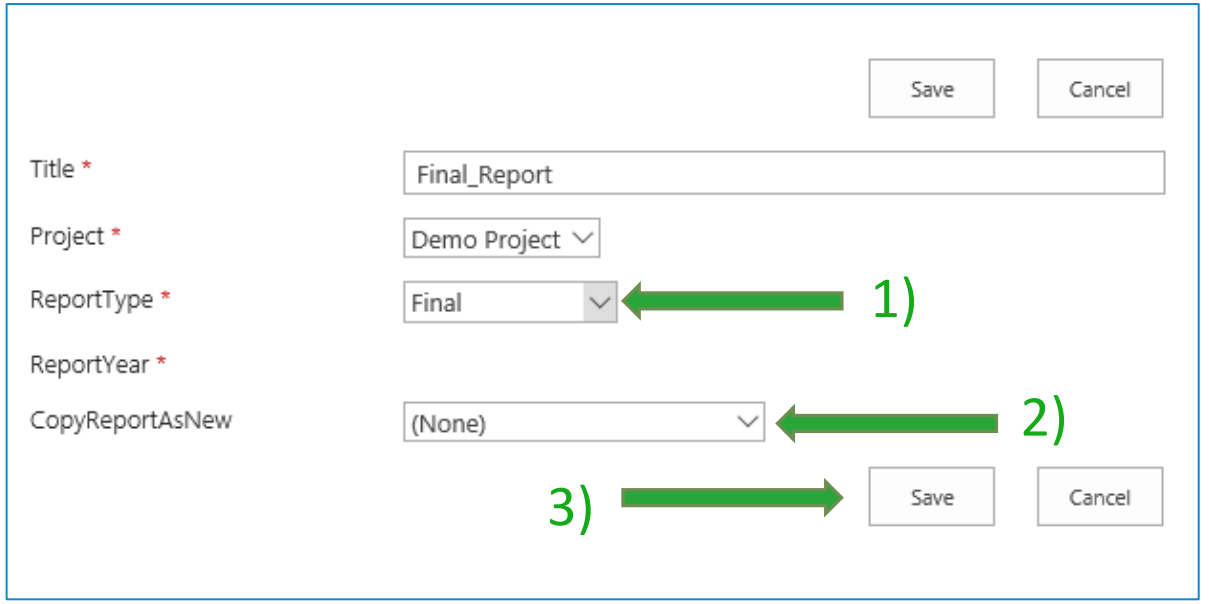
For a final report

- 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"



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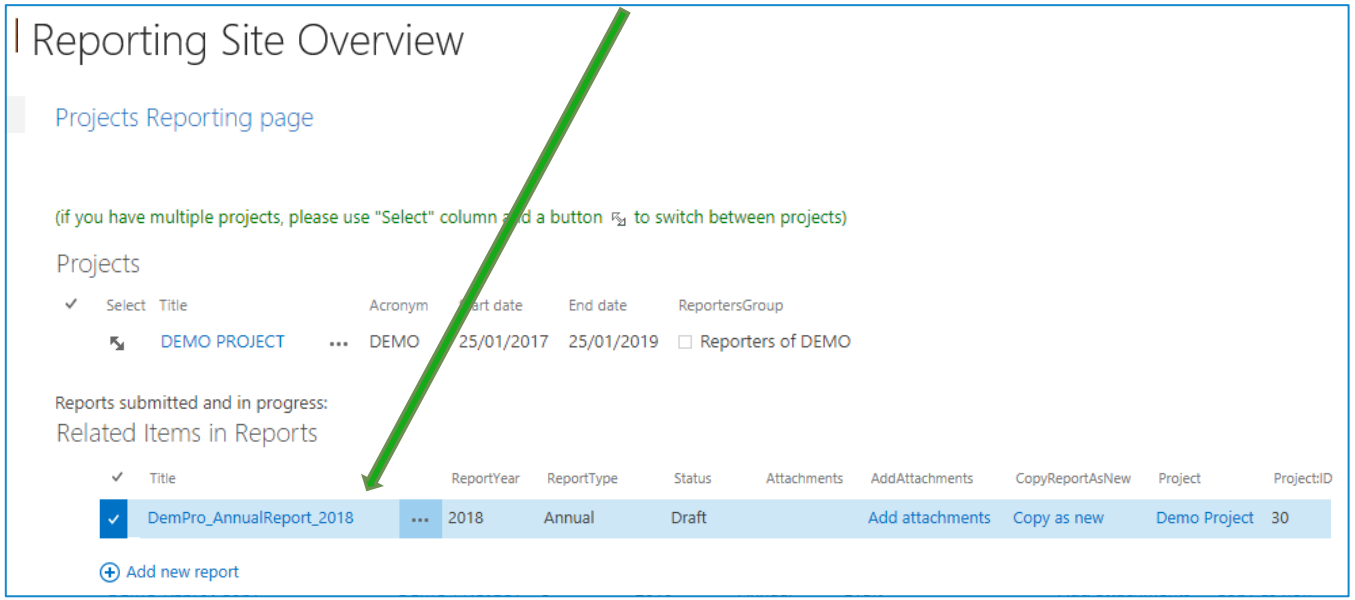
Edit your report

- 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



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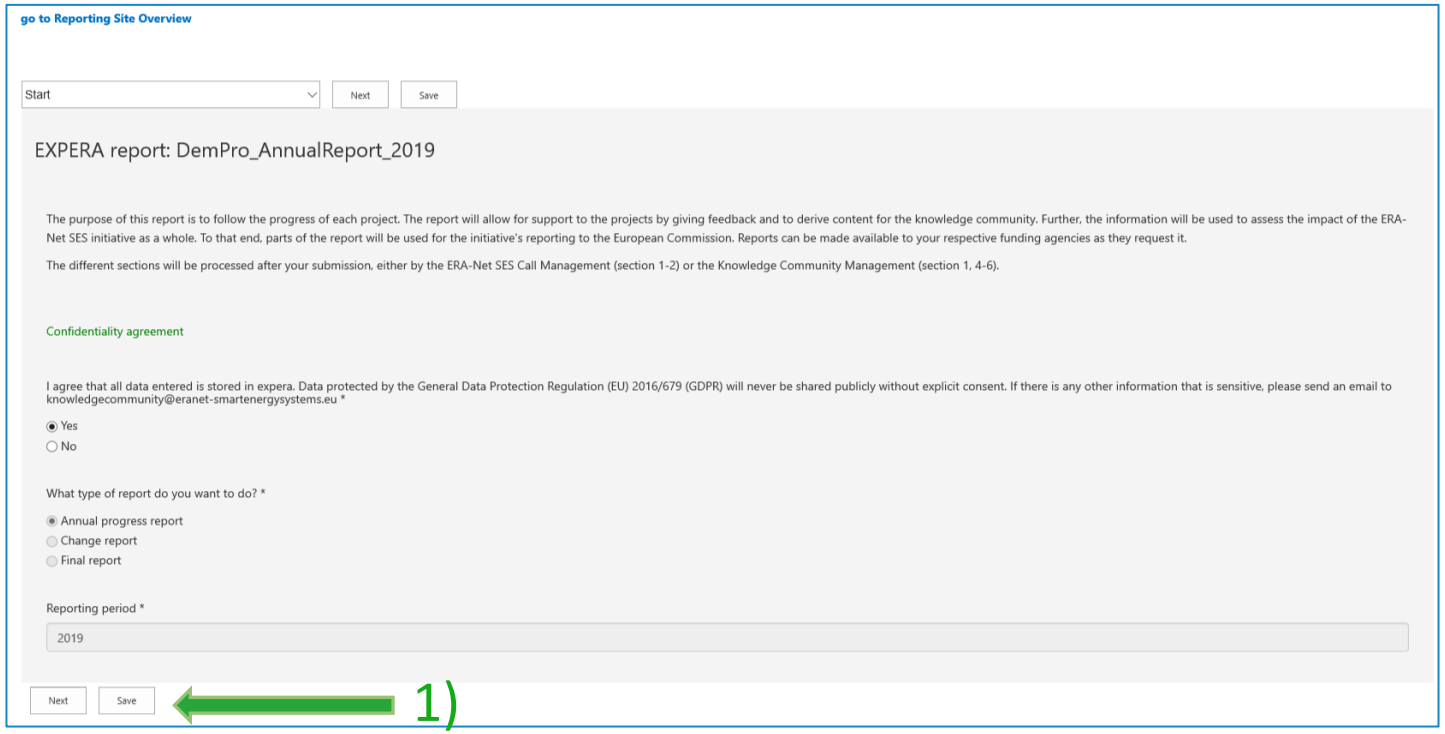
Agree to the terms of use

- 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.



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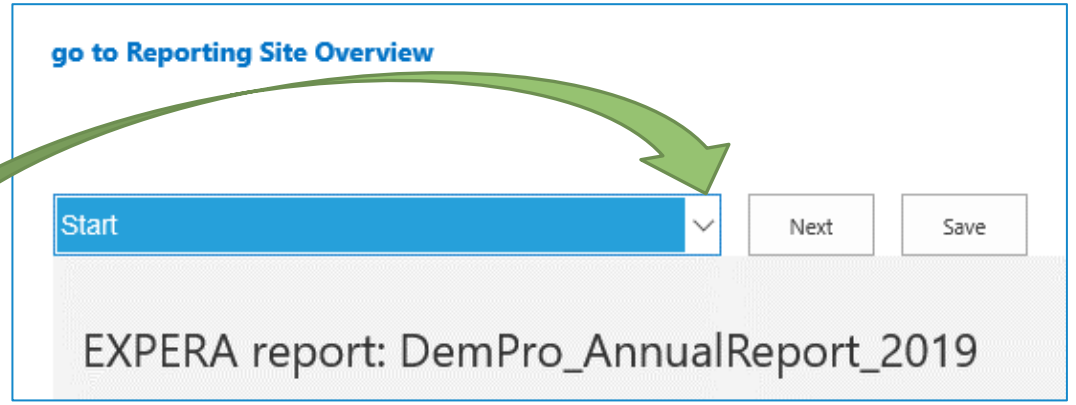
Navigation in the reporting tool

- 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)



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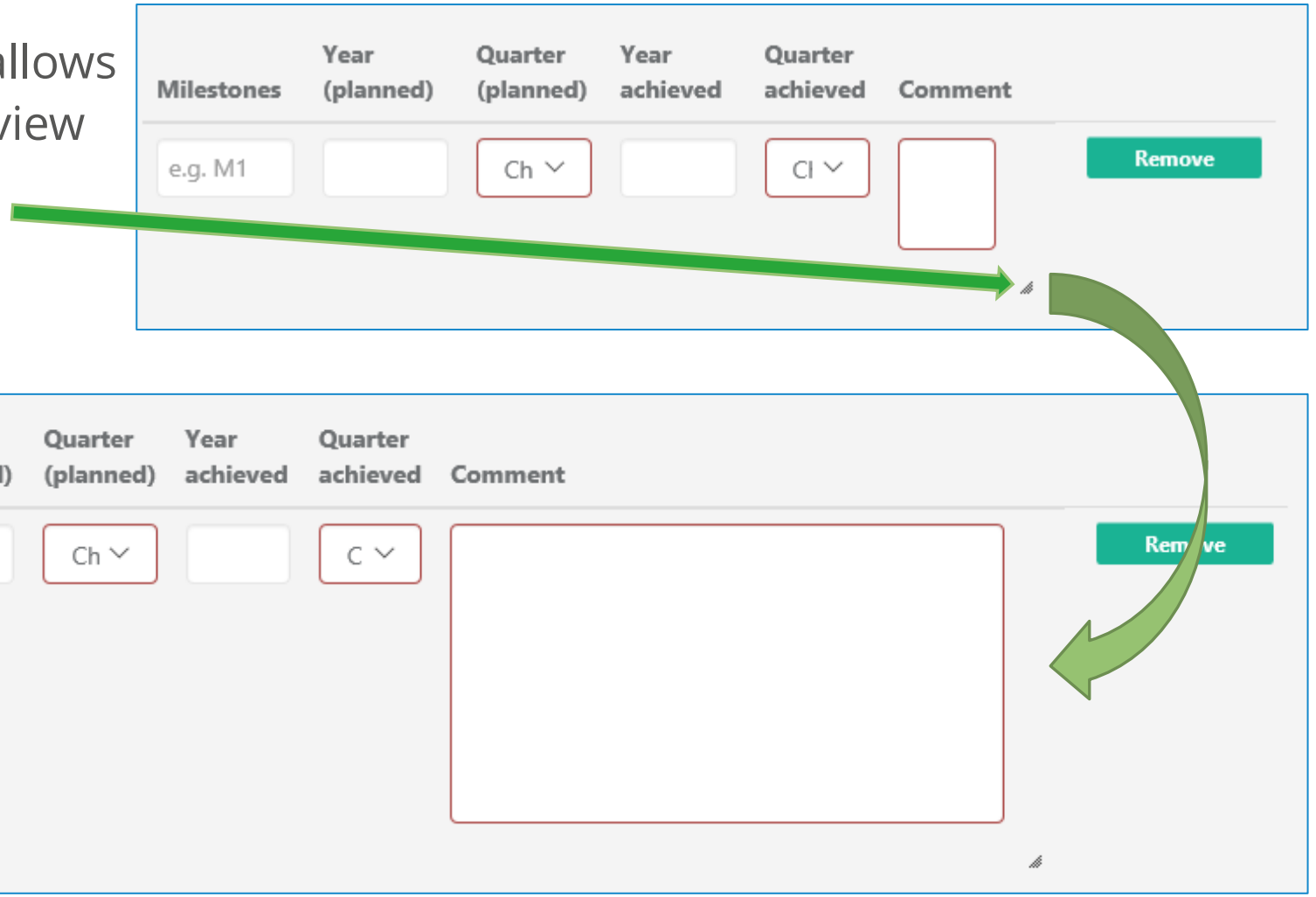
Complement report information

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



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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

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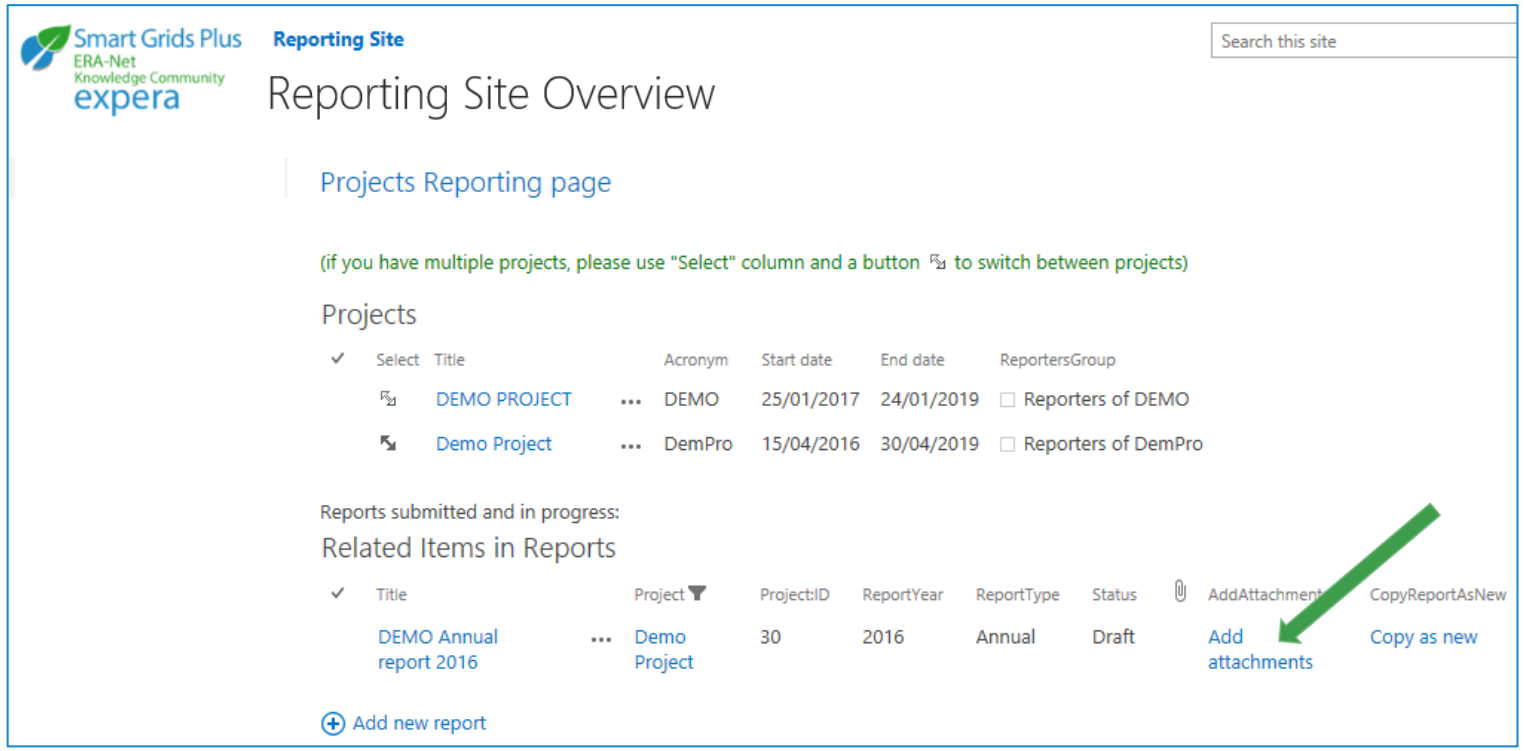
Add background documentation to a report (II)

- 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



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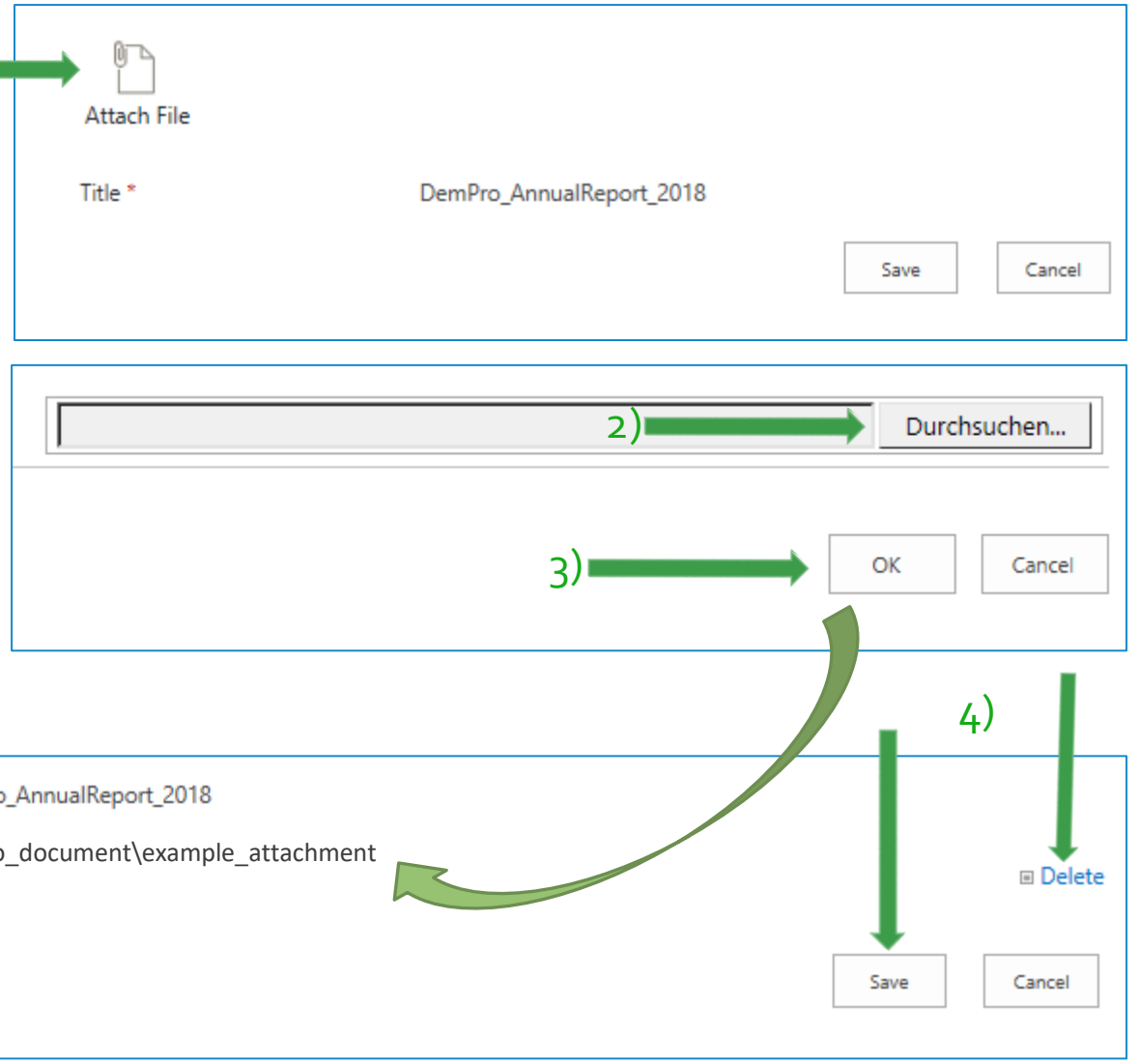
Add background documentation to a report (III)

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



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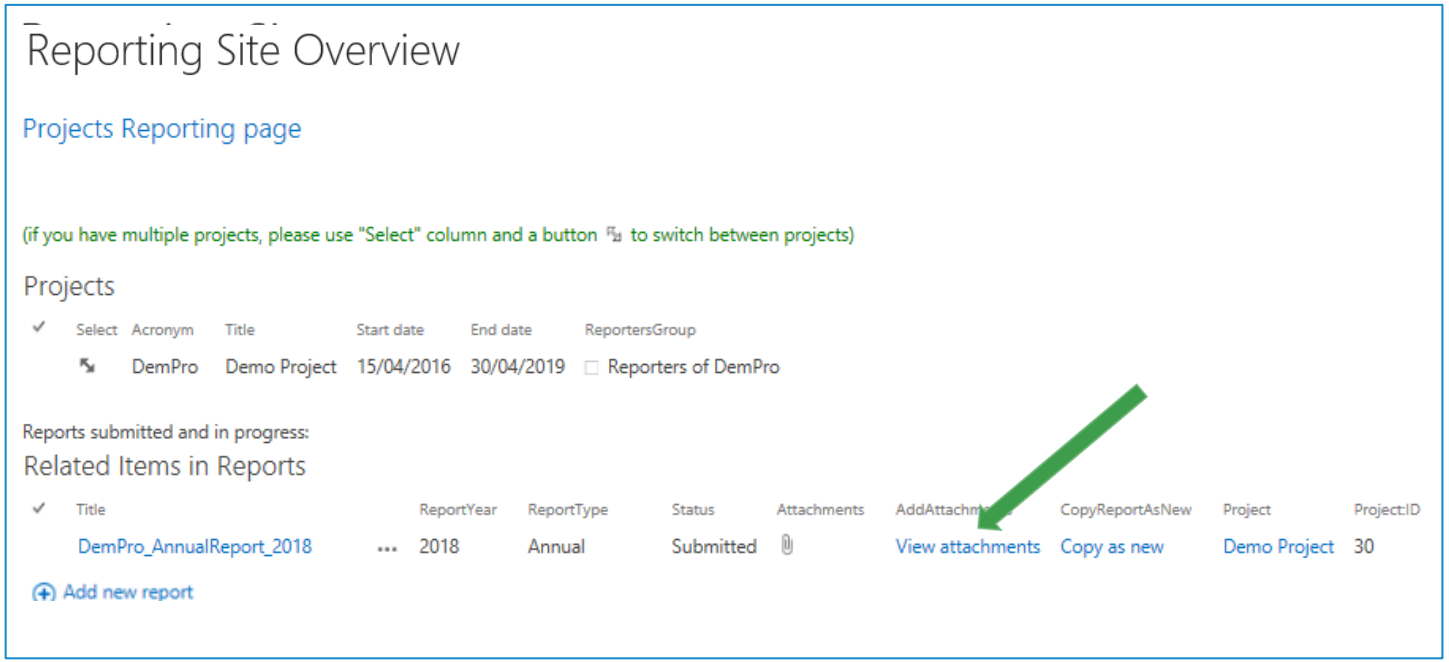
Add background documentation to a report (IV)

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



- **Please note**:
  Public documents should also be added to your project profile in the expera project database

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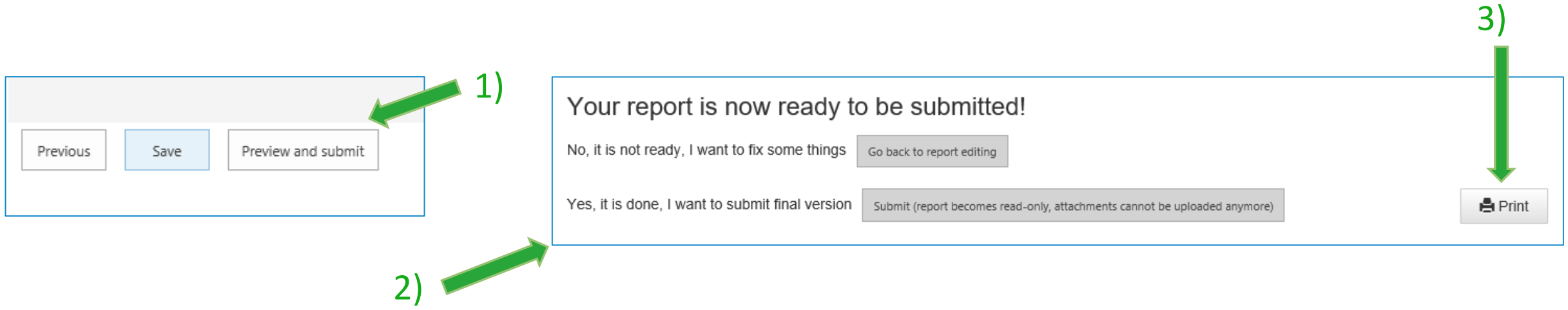
Preview, print and submit the report

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.



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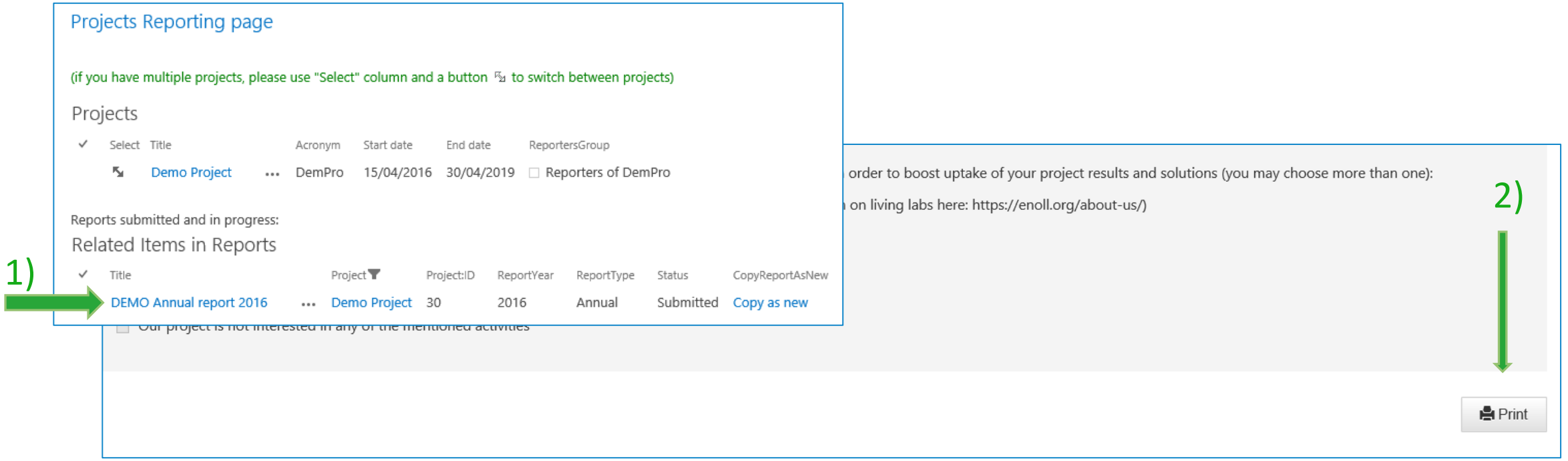
Download a PDF of the submitted report

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”



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expera contact

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[at]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[at]eranet-smartenergysystems.eu

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Funding Partners

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