Electric Mobility Europe

Call 2016

CMT manual Project reporting

Project coordinators

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Contents

1. Introduction

This manual will guide you through the process of reporting on your project's progress and results in the Call Management Tool (CMT) for the Electric Mobility Europe Call 2016. All project partners share the reporting obligations, but only the project coordinator can submit a project report in the CMT.

Reporting activities include reporting on the project's progress (milestones), on the project deliverables (completed deliverables need to be uploaded in the CMT) and on issues/risks perceived during the execution of the tasks and solutions applied. If there are any changes to the project, such as a change of the project coordinator contact, the composition of the consortium, or changes in planning and in finances, then please contact immediately the Call Secretariat (callsecretariat@electricmobilityeurope.eu).

The Call Secretariat will perform a transnational completeness check with regard to the project report and the deliverables.

For projects with duration of 30 months three transnational reports are obligatory:

- Month 12 (periodic report 1)
- Month 24 (periodic report 2)
- Month 30 (final report)

For projects with shorter duration the total number of transnational reports might be reduced to two. Information on the reporting dates was sent per email to all project coordinators.

In summary:

Periodic report 1	M1 until M12
Periodic report 2 *(only if project duration is longer than 24 months)*	M13 until M24
Final report	until M30

1.1 General instructions

In order to submit a project report, all data is entered directly in the CMT, in subsequent data fields. The data fields are clustered in similar forms to the ones in the project proposal submission module of the CMT, but data fields have been added to enable an appropriate reporting:

- Please note that all relevant data entered during the proposal preparation and previous reports have been kept; you only need to fill out the extra data fields.
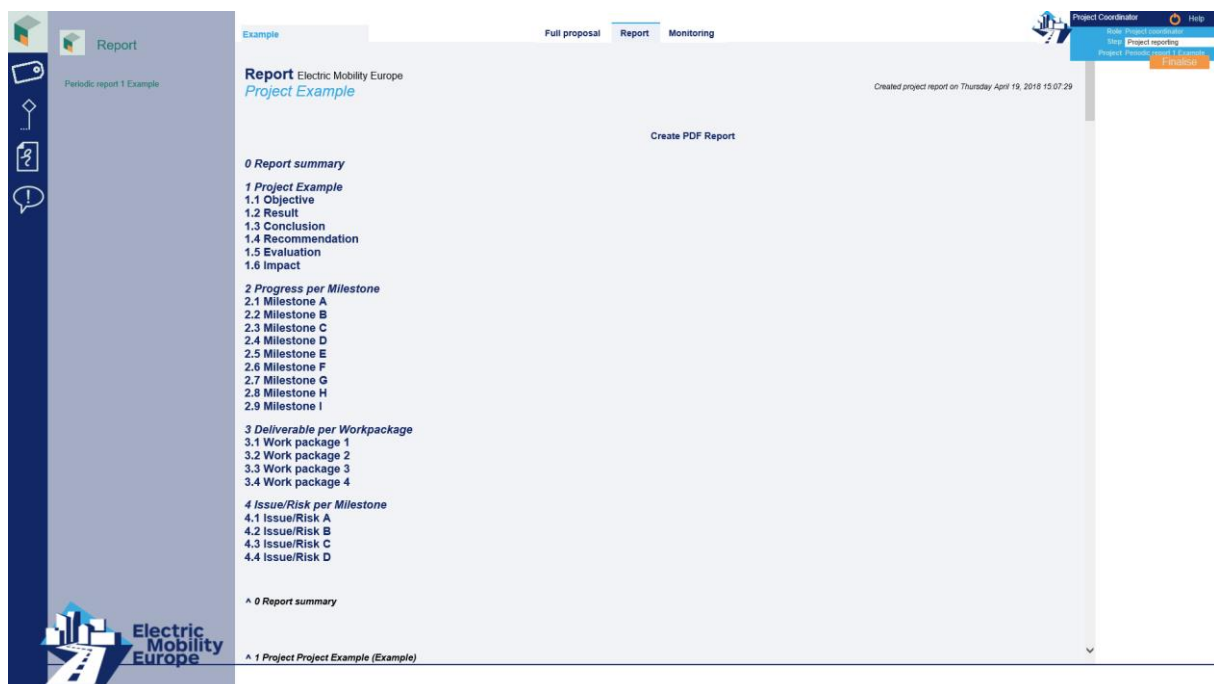
- You may choose to either enter data during the reporting period, or to enter all data at once (please be aware of acceptance period and fixed dates for instalment).
- An explanation of data fields and data to be entered can be found in chapters 2 and 3 of this manual.
- Please note that there are differences between the periodic report(s) and the final report with regard to data fields: some data fields are included only for the final report. In such a case instructions will indicate "Final report only".

In general, please note that:

- With each data field comes a brief explanation in chapter 2 and 3.
- You are to observe a preferable maximum input of 1000 words for each text field. The text editor in the CMT counts down the number of words; the text will colour red when you exceed the maximum number of words.
- Text fields contain a rich text area: when you click the data field the rich text area opens. Click in the window, add text and then click <Ok>.
- After entering data, **you need to save each form** (use the save button at the bottom of each page).

1.2   Submitting your report

You can go to a Factsheet of your project report by clicking the light blue part of the screen (underneath <Create PDF Report>). On top of this screen there is a menu, with the buttons <Full proposal>, <Report> and <Monitoring>. You are now in Report mode (see following image).

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The Factsheet can be downloaded as a pdf file at any time by clicking <Create PDF Report>.

When the report is ready, the project coordinator clicks the orange <Finalise> button and a notification email is sent to the Call Secretariat.

All mandatory fields need to be filled out before you can submit the project report. If a mandatory field is not filled out, this field will be listed when finalising. This is further explained in chapter 4.

To avoid problems we strongly recommend the submission of the report ahead of the deadline!

In chapter 5 of this manual (Troubleshooting) you may find answers to problems occurring with login, forms or other. Should you have any further questions after reading this manual, please contact the Call Secretariat (callsecretariat@electricmobilityeurope.eu).

2. Instructions

2.1 Login

The project coordinator can log in to the CMT via the following link:

cmt-electricmobilityeurope.eu/

The CMT contact person has to fill in his/her username and password and clicks on the <Login> button. After successful login the CMT will be ready to use.
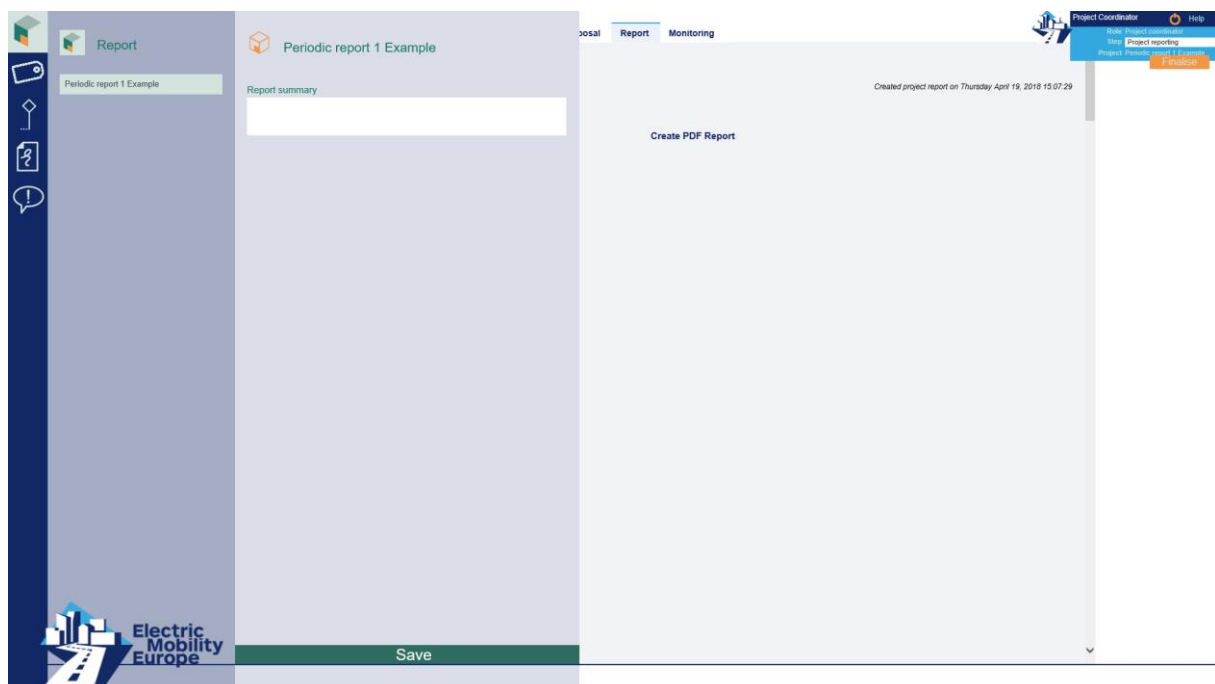
New password
If the CMT contact person has lost or forgotten the password, please contact the EMEurope Call Secretariat (callsecretariat@electricmobilityeurope.eu).

2.2 Project summary

In the upper right corner you see the name of the project coordinator (role), the step: Project reporting and the name of the project.

The grey-blue screen (on the right) shows the Factsheet of the report and its table of content. The middle screen shows the Report form (following image).

The following field in this form is to be filled out:

Report summary - Summarise the project report of this period with a short description of progress, lessons learned and (intermediate) results.

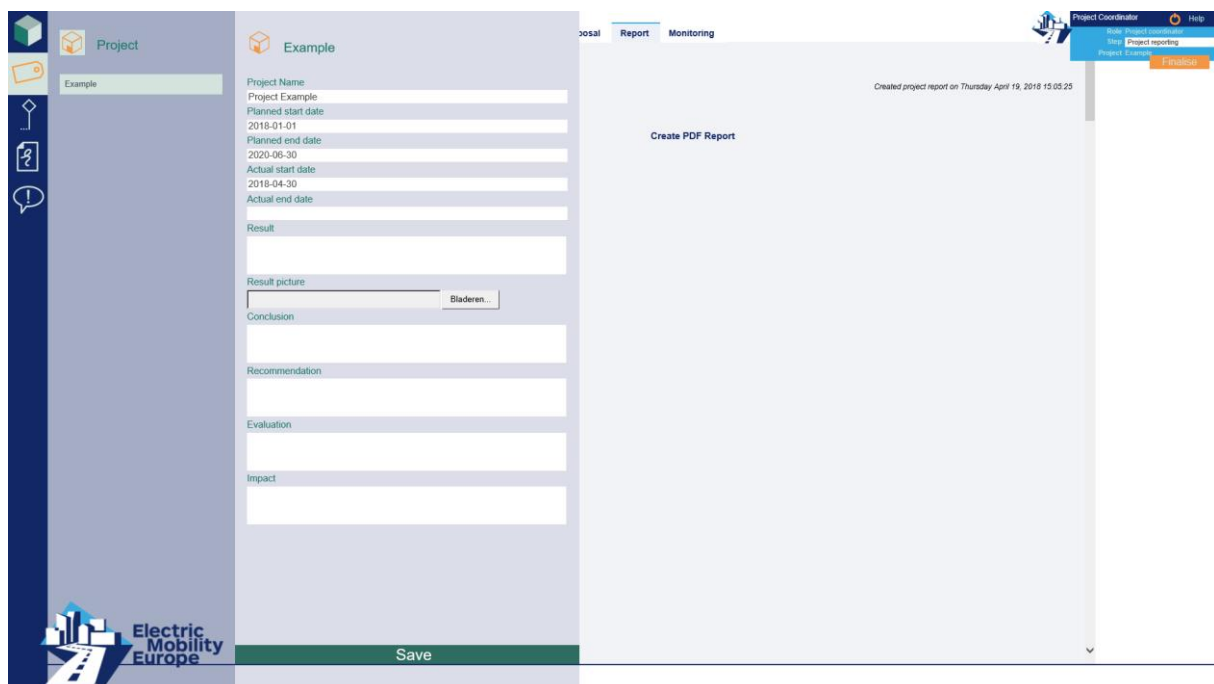**Click the <Save> button after this field has been filled.**

From here the project coordinator subsequently fills out the extra fields in the different sections as listed in the left hand menu (see next paragraphs through to chapter 3).

2.3   Project profile

Proceed to the Project section by clicking the following icon in the left hand menu:

The project coordinator has to fill out the extra fields included below (see also the image below).

Actual start date - Enter the actual start date of the project (using the calendar).

Final report only

Actual end date - Enter the actual end date of the project (using the calendar).

Please note that the project duration (official start to end of the project) should not exceed 30 months in total.

Result - Describe all main results achieved in the project.

Result picture [this field is optional] - You may provide a graphical presentation of the result of your project. By clicking the <browse> button you can select an image file. You may use the following formats: gif, tif and jpg.

Conclusion - Which conclusion(s) have you drawn from the project: have you achieved the project's objective with the results delivered? Describe any significant outcomes in the project, and to what degree these results have been achieved as a result of cooperation between the partners in the project.

Recommendation - What are the main project recommendations? Which follow-up steps might be required, especially regarding implementation? Describe any problems which could not be solved within the project due to internal or external influences. Please, also describe any new ideas and challenges arising from your project which you do not intend to follow, but which are of relevance for the EMEurope Call 2016 challenges.

Evaluation - What lessons have been learned, in terms of content and project organisation? Describe lessons learned relevant for the project itself and for the EMEurope initiative in general.

Impact - Describe the impacts resulting from your project, correlating them to the challenges and objectives addressed by the 5 key areas of the EMEurope Call 2016. Explain how the measures you took for the dissemination of project results and recommendations for implementation will increase the impact of the project.

Click the <Save> button after the fields in the Project form have been filled.
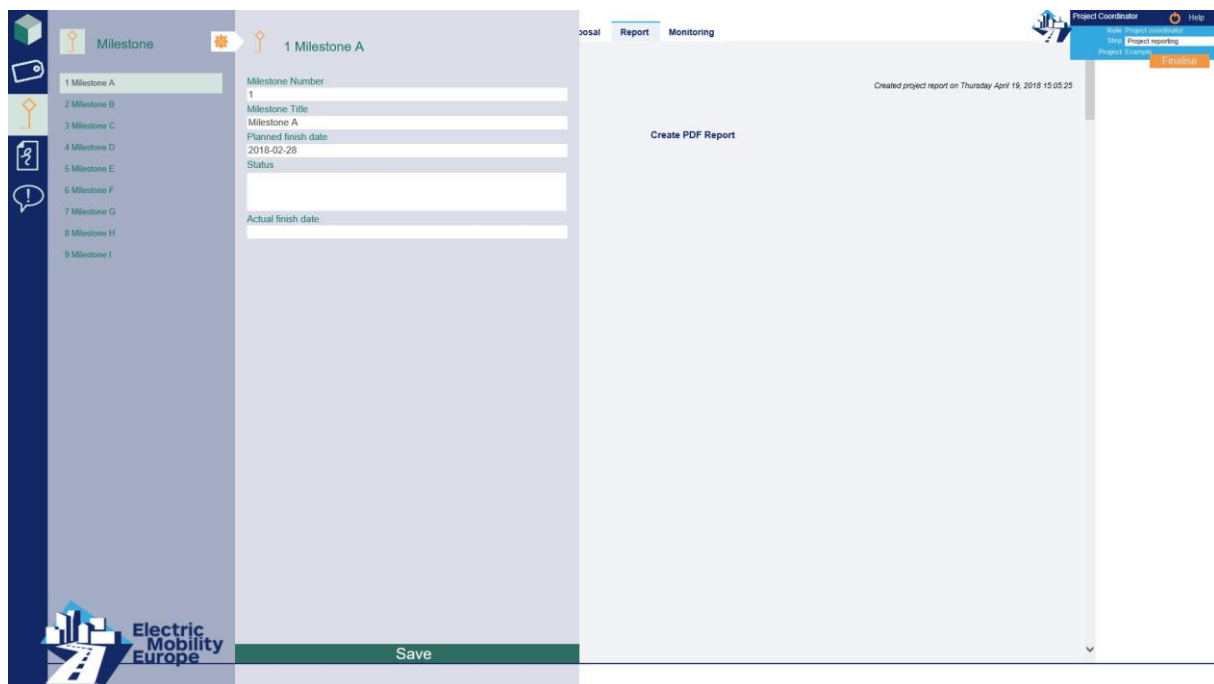
3. Progress

After having filled out the Project section you do need to fill out **extra fields in the Milestone, Deliverable and Issues / Risks** sections. This applies for both periodic and the final report (see paragraph 3.1 until 3.3).

3.1 Milestones

Click the ◇ icon in the left hand menu to open the Milestone section. Milestones are control points where decisions are needed with regard to the next stage of the project. Therefore, in this section progress is reported and shown by the reaching of milestones as planned. Milestones are reached after certain deliverables have been finished.

Click the name of the Milestone in the list you wish to report on and the respective Milestone form opens (see following image).

Milestone data are taken from the proposal submitted. The following **extra** fields are to be filled out:

Status - Explain the status of this milestone. According to its planned finish date, should it have been reached during the reporting period? Please give the reasons for delay, if any, and describe current progress.
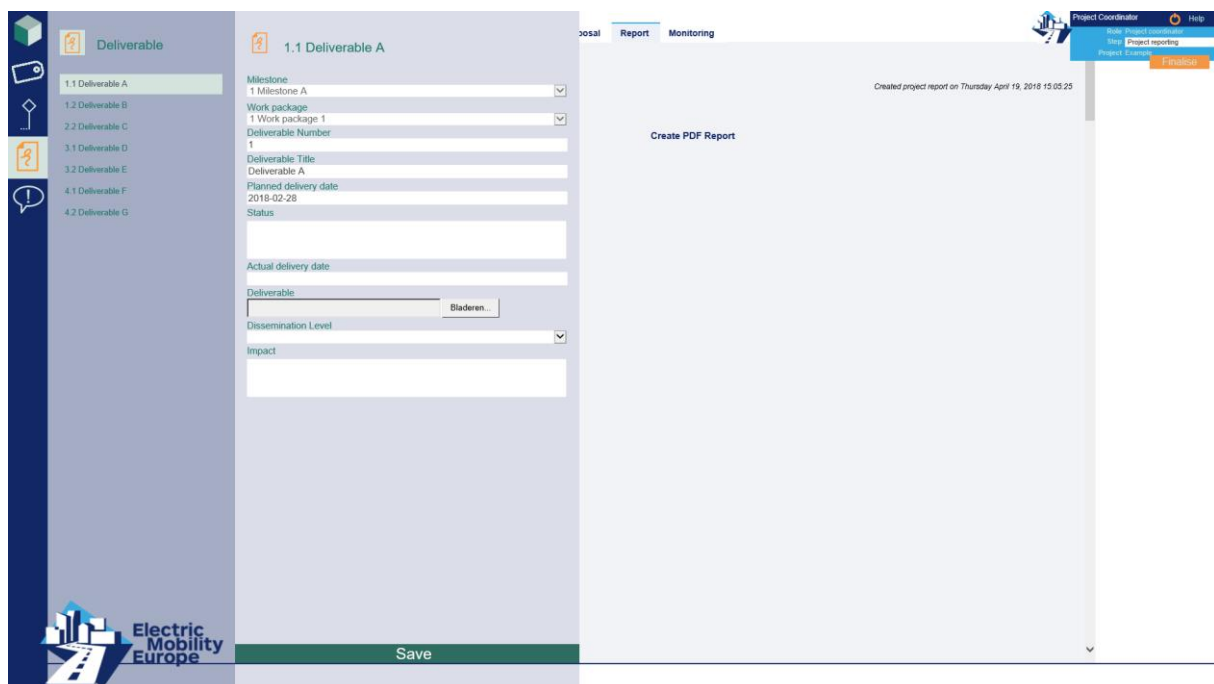
Actual finish date - Enter the actual finish date of the Milestone using the calendar.

Click the <Save> button after the fields in the Milestone form have been filled.

Proceed to the next Milestone (if applicable) and fill out the form in the same manner.

3.2   Deliverables

You proceed to the Deliverable section by clicking the following icon in the menu: . Click the name of the Deliverable you wish to report on and the respective Deliverable form opens (see image below).

Deliverable data are taken from the proposal submitted. The following **extra** fields are to be filled out:

Status - Explain the status of this deliverable. According to its planned delivery date, should it have been finished during the reporting period? Please give the reasons for delay, if any, and describe current progress.

Actual delivery date - Enter the actual delivery date of the Deliverable from the calendar.

Deliverable - In this field the project coordinator can upload the Deliverable by clicking the <browse>button and selecting the respective file. **All file types are allowed.**
If the file is uploaded successfully, the title of the file is visible underneath the field and will be visible in the Report factsheet also.

Please note that it is not obligatory to upload a deliverable for the transnational periodic report. If a deliverable is delayed, explain the reason for delay in the explanation field. Please do not upload empty deliverable files in the CMT, as finalised deliverables cannot be changed without notifying the Call Secretariat.

Please note that you can only upload one document for each deliverable. In case you would like to upload more documents for a deliverable, please merge these documents together in a Pdf file. If a new file is selected, it will replace the previous one.

If you would like to remove the file that has been uploaded, please click the <trash can> icon behind the title of the file. Then click the orange <trash can> icon to confirm removal.

Dissemination level - The level of dissemination for the respective Deliverable must be identified and indicated. Select the appropriate Dissemination level from the following list:

1. Public
2. Restricted to call
3. Restricted to specific group
4. Confidential

Explanation - Please explain the level of dissemination, if not public.

Impact - Describe the impact resulting from the Deliverable with regards to the objective of the respective Work package and / or to the objective(s) of the project as a whole.

Click the <Save> button after the fields in the Deliverable form have been filled.
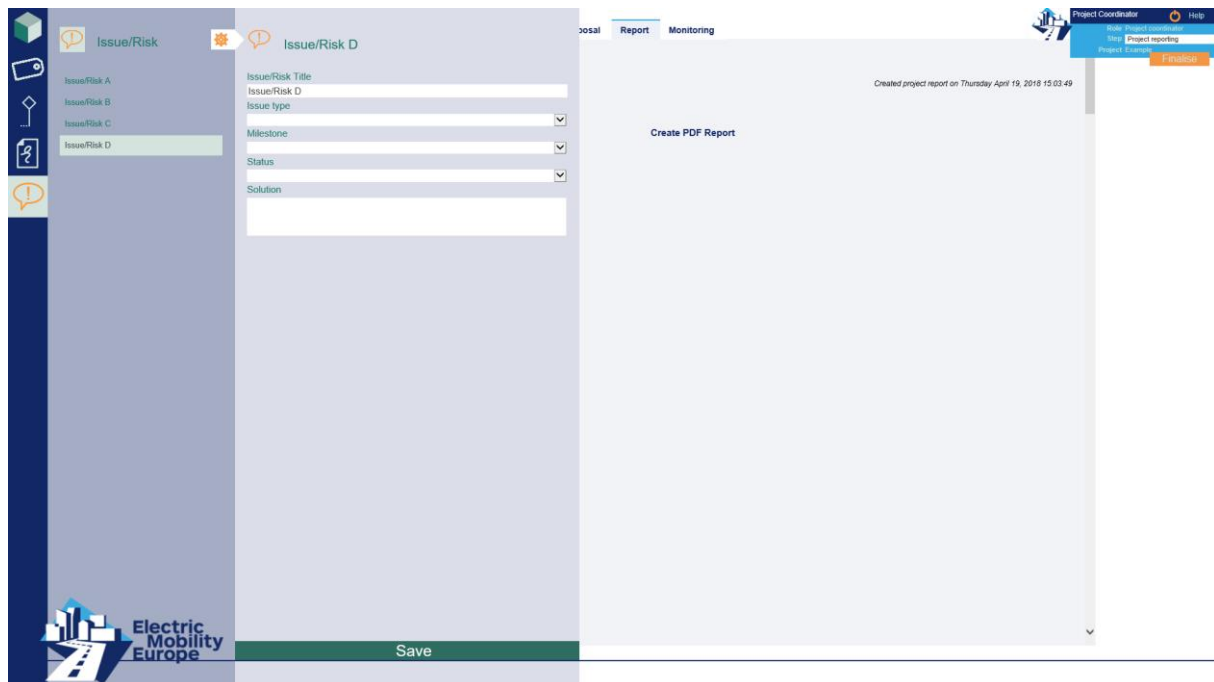
Proceed to the next Deliverable (if applicable) and fill out the form in the same manner.

3.3 Issue/Risk

In the next section the significant issues/risks in the project and associated contingency plans have been described. You need to fill out **extra fields** in this section.

You enter the Issue/Risk section by clicking the following icon in the left hand menu:

Proceed by clicking the name of the Issue/Risk and the respective Issue/Risk form opens (see following image).

The project coordinator fills out the following **extra** fields:

Issue type - Please select an issue type from the following list:
1. People
2. Communications
3. Products & Markets
4. Strategy
5. Finance
6. Company structure & Operations
7. Policy
8. Funding

Milestone - Select the Milestone this issue is related to or which it affects from the list of project milestones.

Status - Please select the appropriate status of the issue from the following list:
1. Solved
2. Workaround
3. Unsolved
4. Non applicable

Solution - Describe the (combination of) option(s) you chose to solve the issue or to contain the risk and for what reason if the Issue has been solved or a workaround has been found.

Click the <save> button after the fields in the Issue/Risk form have been filled out.
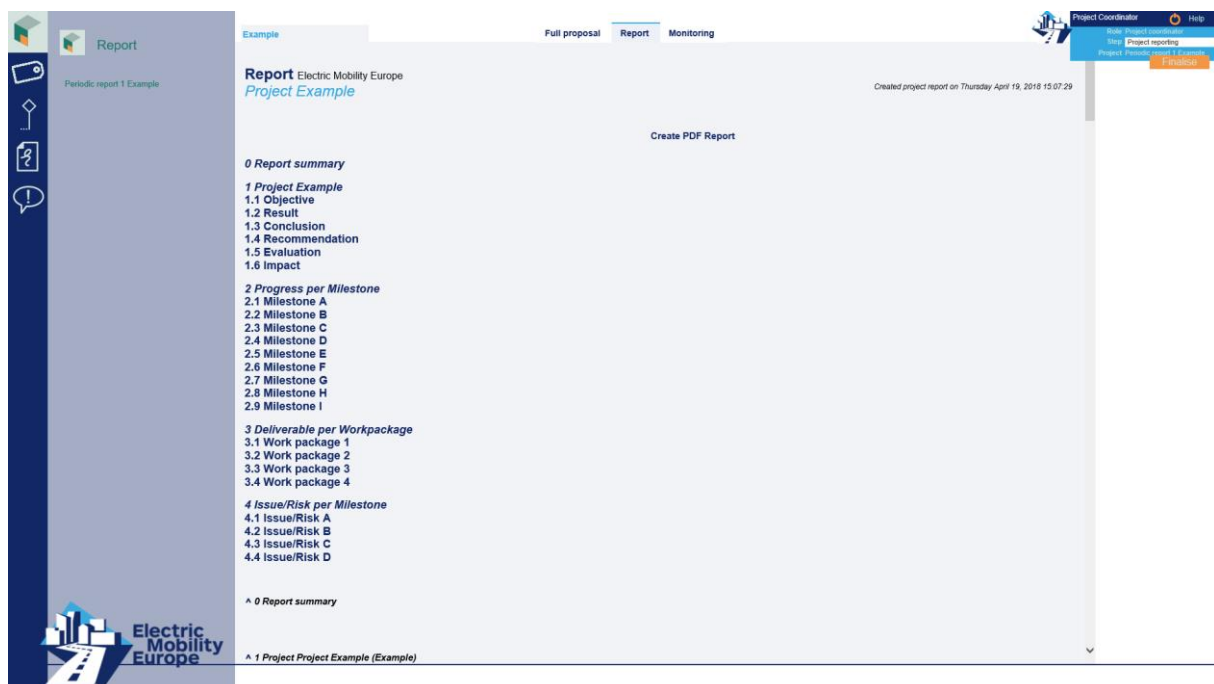
4. Submitting your report

In order to submit a project report, all mandatory fields must have been filled out and all Deliverables reported on must have been uploaded.

You can use the Report factsheet of your project report to check your entries at any time.

4.1 Report factsheet

In this section your project report is built up, listing all entries in the CMT. You can go to the Factsheet at any time by clicking the light blue part of the screen on the right (underneath <Create PDF Report>).

The structure of the Report factsheet of the project report is illustrated by the table of contents, containing the following chapters: Project, Progress, Deliverables and Issues/Risks (see following image).

By clicking a title in the table of contents, you proceed to the designated chapter or paragraph. Clicking the little <arrow> button next to the title of the second order paragraphs brings you back to the table of contents. You may also use the scroll bar on the right to go through the Factsheet.

The Factsheet can be downloaded as a standard pdf file at any time by clicking <Create PDF Report>.

Please note that the Factsheet always displays the present status of the report after editing and saving the respective forms in the sections.

4.2   Finalising your report

If the Project coordinator is ready to submit the project report he/she clicks the orange <Finalise> button on the top right of the screen.

Please note that you can only finalise once. No changes can be made afterwards!

If all requirements are met, the following message will appear:

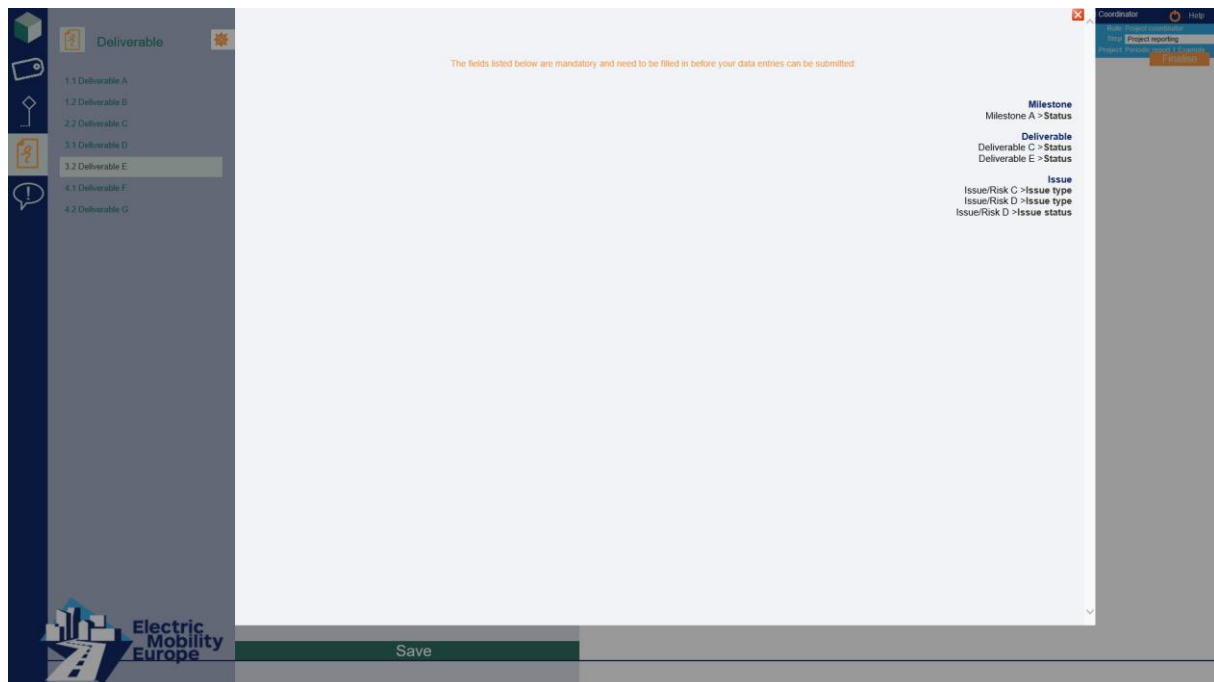<*Your first (second/third/etc.) project report is submitted on [yyyy-mm-dd hh:mm:ss]! Thank you*.>

Please note that the date of submission is registered beneath the Finalise button <*Report 1 (2/3/etc) is submitted: yyyy-mm-dd*>.

You can now logout with the 🔌 button in the upper right corner of the screen.

After finalising, the Project coordinator will be informed by an email that contains the date and hour of finalising the report and the list of deliverables reported on.

If one or more requirements are not met, the following message will appear:

<*The fields listed below are mandatory and need to be filled out before your data entries can be submitted*> (see following image).

The list will contain directions to the field(s) that still need(s) to be filled out (if there are many you may want to make a print screen).

Click the to close this window and return to the respective section, where you can fill out the indicated field(s).

Click the <save> button after a field in a form has been filled out.

If you are ready, click the orange <Finalise> button on the top right of the screen.

Please note that if you are not sure you have filled out all mandatory fields, you may click the <Finalise> button again. Only mandatory fields that still need to be filled out will now be visible in the list.

5. Troubleshooting

5.1 Login fails

If your login fails: please try again. Check the spelling of your login name. Retype your password slowly (for security reasons the password is not shown while you type it in).

Mistakes sometimes occur by copy and paste. Often spaces or line breaks or even other characters are copied unintentionally.

If this does not help, please contact the EMEurope Call Secretariat: callsecretariat@electricmobilityeurope.eu.

5.2 Password lost

In case you have lost your password, please contact the EMEurope Call Secretariat: callsecretariat@electricmobilityeurope.eu.

5.3 Cannot save entries

If you cannot save the entries in a form, you might refresh (F5) and then try to save your entries again. There may also be a little delay: wait a few seconds after saving. If you still cannot save, please contact EMEurope Call Secretariat: callsecretariat@electricmobilityeurope.eu.

5.4 After save, I get to homepage

If you have logged in to the system, your session is active for about 480 minutes. Each time you select a navigation link or save form entries, the session time is reset. But if you stay inactive for about 480 minutes, the session will time out and you are considered as not logged in anymore, resulting in a redirection to the login page.

5.5 Help

For any other questions please send an email to the EMEurope Call Secretariat: callsecretariat@electricmobilityeurope.eu.