

Interreg



Co-funded by
the European Union

IPA South Adriatic



Interreg IPA South Adriatic

Partner Reporting in Jems -Training meeting

24 May 2024



REGIONE
PUGLIA



Jems Technical procedure

Partner Reporting



LOG-IN and GENERAL INFORMATION

- URL of Interreg IPA South Adriatic Jems: <https://jems.southadriatic.eu/>
- Use your email and password to Log-in;
- In case you forgot your password click on “Forgot password” button or contact: jems@southadriatic.eu

The screenshot shows the Jems login interface. On the left, a white box contains the Interreg IPA South Adriatic logo and a welcome message: "Welcome to the monitoring system of my programme name! Here you can find our latest calls and manage your applications. Just login or create a new account and get started!". On the right, the "Jems - Login" section features input fields for "Email" and "Password", a "Login" button, and links for "Create a new account" and "Forgot password". A language dropdown menu in the top right corner is set to "English". At the bottom, it states "Jems is a project of Interact" and "Co-funded by the European Union Interreg".

- The usage of up-to-date web browsers (Google Chrome, Microsoft Edge, Mozilla Firefox) is recommended;
- Jems Interreg IPA South Adriatic runs in English language only;

LOG-IN and GENERAL INFORMATION

1.1 Access to the partner report section

When a partner user has been assigned with edit rights of its partner organisation within the project privileges overview, it can create partner reports within its own dedicated section.

- From the “**Dashboard**” select the project for which you would like to fill in the partner report and click to open.
- Select “**Reporting**” in the left menu to get to the reports of the dedicated PP.



The screenshot displays the Jems application interface. On the left, a blue sidebar menu contains the following items: 'Project overview' (with a home icon), 'Reporting' (highlighted with a red box and an upward arrow), 'Project reports' (with an upward arrow), 'Project reports' (with a vertical line), 'Partner reports' (with a downward arrow), 'Contracting' (with a downward arrow), 'Application form' (with a downward arrow), 'Shared folder' (with a folder icon), 'Export' (with a download icon), and 'Project privileges' (with a user icon). At the bottom of the sidebar is the Jems logo and the text 'A harmonised tool by Interact'. The main content area shows the breadcrumb 'Dashboard / Applications / [redacted]' and the title 'Application form SA-010021 [redacted]'. Below this is the 'Project overview' section, which includes a 'Status: Contracted' label (highlighted with a red box) and the text 'since 20/02/2024)'. A table follows with project details:

Project ID and acronym	[redacted]
Applicant name	[redacted]
Project name	[redacted]
Programme priority	PA 2 - PA 2 - A greener South Adriatic programme area, by promoting clean and fair energy transition and risk management
Specific objective	S.O.2.3 - Promoting energy efficiency and reducing greenhouse gas emissions
Call	Capitalisation Small-Scale Projects Ends 07/04/2023. Time left: 0 days, 0 hours and 0 minutes.
First submission	[redacted]
Latest re-submission	[redacted]
Funding decision	[redacted]
Contracted	[redacted]

The user has access to the partner reports of the partner institution according to the settings in the “Project privileges”. For example, to have access to PP2 reports, the user needs to be added to PP2 with view/edit rights.

LOG-IN and GENERAL INFORMATION



ATTENTION!

See factsheet “**Jems Manual Contracting and privileges**”, published on our website, for more details on partner setting procedures.

In order to fulfil the LP tasks and do the reporting on project level, the LP should have view access to the partner reports of all PP.

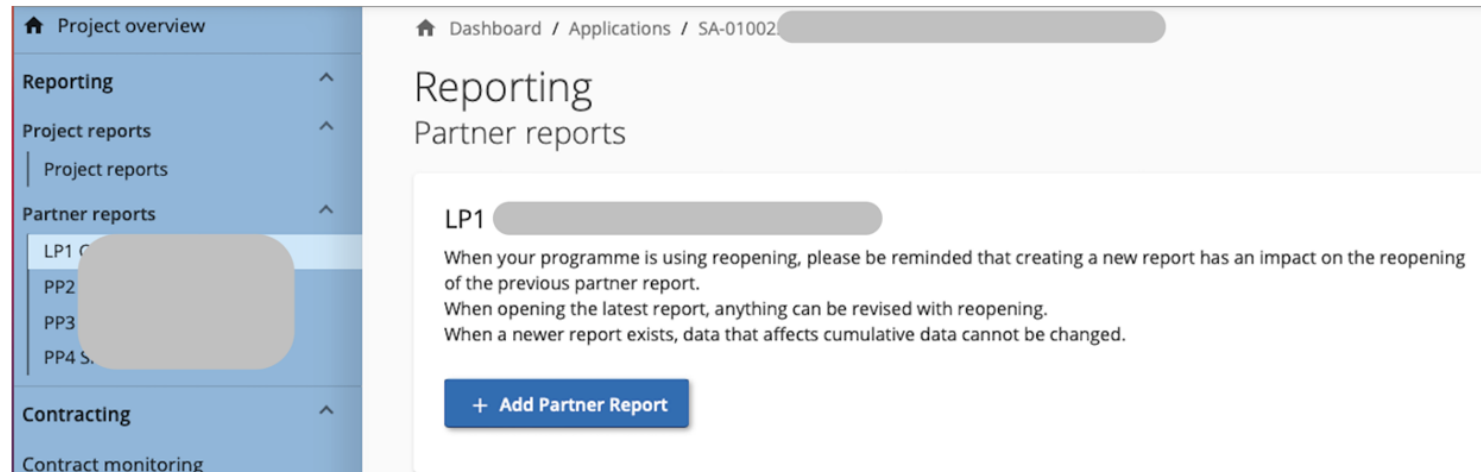
Please carefully check the settings for access to General Data Protection Regulation (GDPR) sensitive data in the “Project privileges”.

The screenshot displays two user configuration panels. The top panel is for 'LP1' and the bottom for 'PP2'. Both panels have a status bar at the top indicating '? No control institution assigned'. Each panel contains a text field for the username (LP@xxx.com and PP2@xxx.com respectively), a '+', and buttons for 'view' and 'edit'. To the right of these buttons is a toggle switch for 'Sensitive data' and a trash icon. Red arrows in both panels point to the 'view' button and the 'Sensitive data' toggle switch. At the bottom of each panel are 'Discard changes' and 'Save changes' buttons.

PARTNER REPORTING SECTION

1.2 Create a partner report

- Select the PP from the left menu and click to open the partner specific reporting section. To create a partner report, click on “+ Add Partner Report”.



- Only users with “**edit**” privilege can create a partner report.

Consider that the last approved AF version at the moment of creation is the reference basis for the partner report. Ongoing modifications will have no impact on the data in existing reports.

PARTNER REPORTING SECTION

1.3 “Report Identification” section

Creating a partner report will lead you automatically to the first tab called “partner progress report identification”.

Dashboard / Applications / SA- / Partner report R.1

Partner report R.1
LP1

Status **Draft**

< Report Identification Work plan progress Public procurements List of expenditures Contributions Report annexes Report export Financial overview

A.1 Partner progress report identification

Project ID and acronym	
AF Version linked	5.0
Related call	1 - Capitalisation Small-Scale Projects
Partner report ID	R.1
Partner report status	Draft → Submitted → Control ongoing → Certified
Partner number	LP1
Name of the organisation in original language	
Name of the organisation in english	
Legal status	Private
Type of partner	Interest groups including NGOs
Partner organisation can recover VAT for project activities	Yes
Co-financing source and rate	IPA III CBC 85,00%
Country	Shqipëria (AL)
Local currency (accoridng to InforEuro)	ALL

Key information is taken from the AF version valid at the moment of the partner report creation. The AF version to which the partner report is linked is displayed in the partner reports overview section.

PARTNER REPORTING SECTION

1.4 “Work plan progress” section

The second tab “**work plan progress**” takes the work plan related data from the last approved AF, organized per work packages.

Describe your contribution to each work package during the reporting period. Click on the work package to unfold it for reporting on activities, deliverables and outputs under this WP. To fold the detailed view again, click on the work package or the “^” icon in the top right corner.

The information will be used by both: the controller and the LP. For the controller it is relevant for verifying the expenses related to these activities. The LP will use the information provided in all the partner reports to prepare the project report:

- Describe your contribution to each activity during the reporting period.
- Any relevant supporting document can be uploaded under attachments. Please upload any deliverable produced when implementing or contributing to project activities. In case multiple files should be uploaded per item, it is recommended to upload a .zip or .rar file.
- Tick the box if you contributed to the output.
- Add an attachment demonstrating your contribution to the output.

PARTNER REPORTING SECTION

Work package 1

Please describe your contribution to the activities carried out in this reporting period.

Enter text here

Please indicate how you contributed to project activities in this reporting period and choose deliverables and outputs you contributed to.

Activity Nr.	Activity title	Progress	Attachments
A 1.1	Opening Workshops: capitalization action starting from [redacted] (CBT)	<div>Enter text here</div>	↗
Deliverable nr.	Deliverable title	Contribution	Attachments
D 1.1.1	[redacted], Opening Workshop: capitalization action of topics (CBT)–Workshop kit [redacted]	<input type="checkbox"/>	↗

PARTNER REPORTING SECTION

- The partner report should be linked to a reporting period (drop down menu).
- The reporting period start and end dates should be defined.

Reporting period start date (DD/MM/YYYY)

Reporting period end date (DD/MM/YYYY)

Reporting period

A.2 Summary of partner's work in reporting period
Please describe your progress in this reporting period and how this contributes to other partners' activities, outputs and deliverables delivered in this reporting period.

Enter text here

A.3 Partner problems and deviations
If applicable, please describe and justify any problems and deviations including delays from the work plan presented in the application form and the solutions found.

Enter text here

A summary description on the partner achievements in the reporting period should be provided. Describe your progress in this reporting period and how this contributed to other partner's activities, outputs and deliverables in this reporting period. The information will not only be used by the LP for drafting the project report but also by the controllers for verifying the expenditure related to these activities. Please consider any remarks/recommendations provided by the LP.

PARTNER REPORTING SECTION

1.6 “List of expenditures (LoE) ” section

The list of expenditure (LoE) section is the place where partners list incurred costs. When first coming to this section, it looks as below. By clicking on “+Add expenditure”, the PP can add expenditure items one by one.



For small Scale Projects

Considering that all the expenditures are “Lump sums” or “Unit Costs”, and are pre-filled into the system, only the following columns need to be filled by each PP (see pictures below):

- **Unit costs and Lumps sums** - List of expenditures are pre-filled in this column. Please , check and select, in the drop-down menu, the right expenditure. (*ATTENTION! - In the drop-down menu, select “N/A” in order to declare FLC expenditures (only for Italian Partners)*)
- **Description** – Detailed description of the expenditure item should be provided.
- **Comment** – A comment on the expenditure item can be added.

PARTNER REPORTING SECTION

Status
Draft

Report identification
Work plan progress
Public procurements
List of expenditures
Contributions
Report annexes
Report export
Financial overview
Subr

List of expenditures

Currencies and conversion rates are taken from InforEuro, the European Commission's official monthly accounting rates. The monthly rates are automatically updated until the month when the Partner Report is first submitted for verification. If your Local currency is EUR, your expenditure shall be reported in EUR only.

ID	Previously parked by	Unit costs and Lump sums	Cost category	Contract ID	Internal reference no.	Invoice no.	Invoice date	Date of payment	Description	
R1.?	<input type="checkbox"/>	Preparation cost (for	Multiple	N/A						
R1.?	<input type="checkbox"/>	Workshop, seminars	Multiple	N/A						
R1.?	<input type="checkbox"/>	Action plan/Model/...	Multiple	N/A						

+ add expenditure

Status
Draft

Report identification
Work plan progress
Public procurements
List of expenditures
Contributions
Report annexes
Report export
Financial overview
Subr

List of expenditures

Currencies and conversion rates are taken from InforEuro, the European Commission's official monthly accounting rates. The monthly rates are automatically updated until the month when the Partner Report is first submitted for verification. If your Local currency is EUR, your expenditure shall be reported in EUR only.

ID		Total invoice value	Number of Units	Price per unit	VAT	Declared amount	Currency	Conversion rate	Declared amount in EUR	Attachments	
R1.?	<input type="checkbox"/>	0,00	1,00	5.865,00	0,00	5.865,00	EUR	1	5.865,00		
R1.?	<input type="checkbox"/>	0,00	1,00	13.464,00	0,00	13.464,00	EUR	1	13.464,00		
R1.?	<input type="checkbox"/>		1,00	9.679,00		9.679,00	EUR	1	9.679,00		

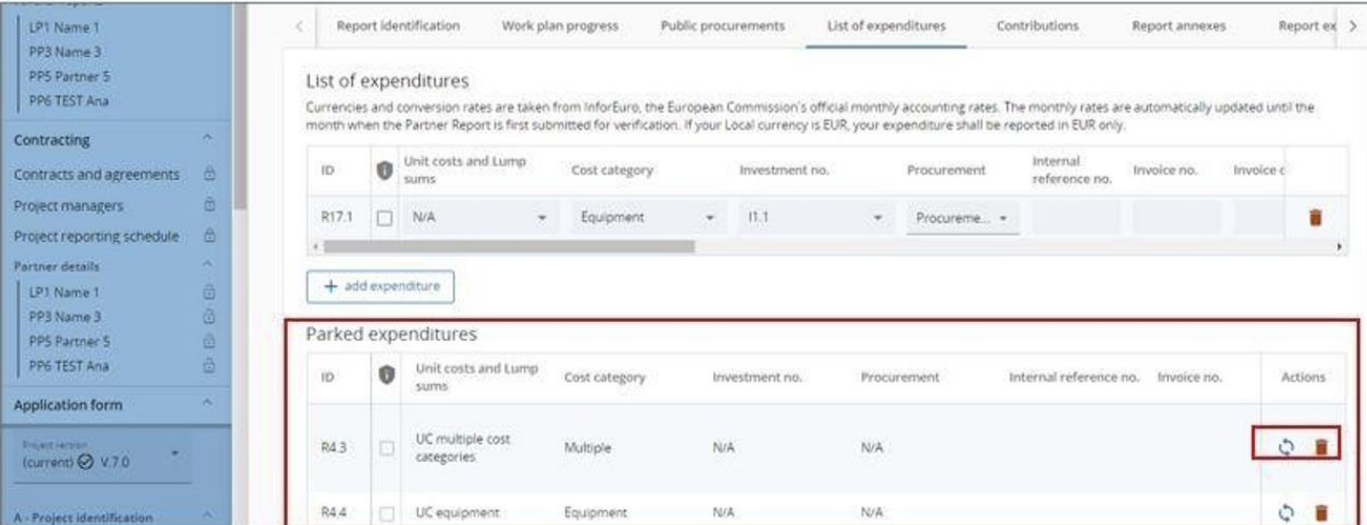
+ add expenditure

PARTNER REPORTING SECTION

Parked expenditure items

In case further clarification is needed, a controller can **“park”**, i.e. put on hold, an expenditure item for final verification in a later partner report. This allows to still finalize the control work and to issue the control certificate.





In case a controller parked some expenditure items in a previous partner report, they show up in the parked expenditure section of the list of expenditure.



The screenshot displays the 'List of expenditures' section of a software interface. The left sidebar contains a navigation menu with items like 'LP1 Name 1', 'PP3 Name 3', 'PP5 Partner 5', 'PP6 TEST Ana', 'Contracting', 'Contracts and agreements', 'Project managers', 'Project reporting schedule', 'Partner details', 'Application form', and 'Project version (current) V.7.0'. The main area shows a table of expenditures with columns: ID, Unit costs and Lump sums, Cost category, Investment no., Procurement, Internal reference no., Invoice no., and Invoice c. Below this is a '+ add expenditure' button. A red box highlights the 'Parked expenditures' section, which contains a table with columns: ID, Unit costs and Lump sums, Cost category, Investment no., Procurement, Internal reference no., Invoice no., and Actions. The 'Parked expenditures' table lists items R4.3 and R4.4, both with 'UC multiple cost categories' and 'UC equipment' respectively, and 'Multiple' and 'Equipment' as cost categories. The 'Actions' column for these items shows a circular arrow icon and a trash can icon.

ID	Unit costs and Lump sums	Cost category	Investment no.	Procurement	Internal reference no.	Invoice no.	Invoice c
R17.1	<input type="checkbox"/> N/A	Equipment	II.1	Procureme...			

+ add expenditure

ID	Unit costs and Lump sums	Cost category	Investment no.	Procurement	Internal reference no.	Invoice no.	Actions
R4.3	<input type="checkbox"/> UC multiple cost categories	Multiple	N/A	N/A			 
R4.4	<input type="checkbox"/> UC equipment	Equipment	N/A	N/A			 

PARTNER REPORTING SECTION

1.7 “Contributions” section

The “**Contributions**” section is the place where the partner should report on the actual received partner contributions. This is a cumulative section, which records amounts received per reporting period and adds them up in next partner reports. This section has only to be filled in by those partners benefitting from external financial contributions to their budget

Public and private Italian Partners need to fill only the 2nd row (CIPESS regulation) as indicated in the table below.

Status 🔄 Draft

< Report identification Work plan progress Public procurements List of expenditures **Contributions** Report annexes

Follow-up of partner contribution

In this section, partners organisations are expected to list the partner contributions as they incur in reality (amounts received by partner). Partner organisations are advised to navigate to the financial overview to see the breakdown of the total reported amount per contribution source.

Name of organisation / Source of contribution	Legal status	Amount in AF	Previously reported	Current report	Total reported so far	Attachments
		0,00	0,00	0,00	0,00	📎
CIPESS Regulation	Automatic Public	6.760,56	0,00	0,00	0,00	📎
+						
Sub-total public contribution		0,00	0,00	0,00	0,00	
Sub-total automatic public contribution		6.760,56	0,00	0,00	0,00	
Sub-total private contribution		0,00	0,00	0,00	0,00	
Total		6.760,56	0,00	0,00	0,00	

PARTNER REPORTING SECTION

Public and Private Albanian/Montenegrin Partners need to fill only the 1st row as indicated in the table below.

Status Draft

<

Report identification

Work plan progress

Public procurements

List of expenditures

Contributions

Report annexes

Follow-up of partner contribution

In this section, partners organisations are expected to list the partner contributions as they incur in reality (amounts received by partner). Partner organisations are advised to navigate to the financial overview to see the breakdown of the total reported amount per contribution source.

Name of organisation / Source of contribution	Legal status	Amount in AF	Previously reported	Current report	Total reported so far	Attachments
	Private	9.842,25	0,00	0,00	0,00	↑
<div>+</div>						
Sub-total public contribution		0,00	0,00	0,00	0,00	
Sub-total automatic public contribution		0,00	0,00	0,00	0,00	
Sub-total private contribution		9.842,25	0,00	0,00	0,00	
Total		9.842,25	0,00	0,00	0,00	

PARTNER REPORTING SECTION

1.10 “Financial overview” section

The partner report financial overview section comes with three different financial overview tables. You can review the summary of the information you provided and, if needed, make modifications in the relevant section.

The amounts included in the tables represent the aggregation of data from partner reports previously submitted, by the date the current partner report was created. Beware that only the last partner report created has the most recent aggregated data.

Note: A report for a new reporting period should be created only once reports on earlier periods are no longer in “draft” status.

Financial overview

The amounts included in tables below represent the aggregation of data from all partner reports submitted, by the date when the current partner report was created. Beware that only the last partner report created has the most up-to-date aggregated data (in case partner reports were not submitted in the same order they were created)!

Partner Expenditure - summary (in Euro)

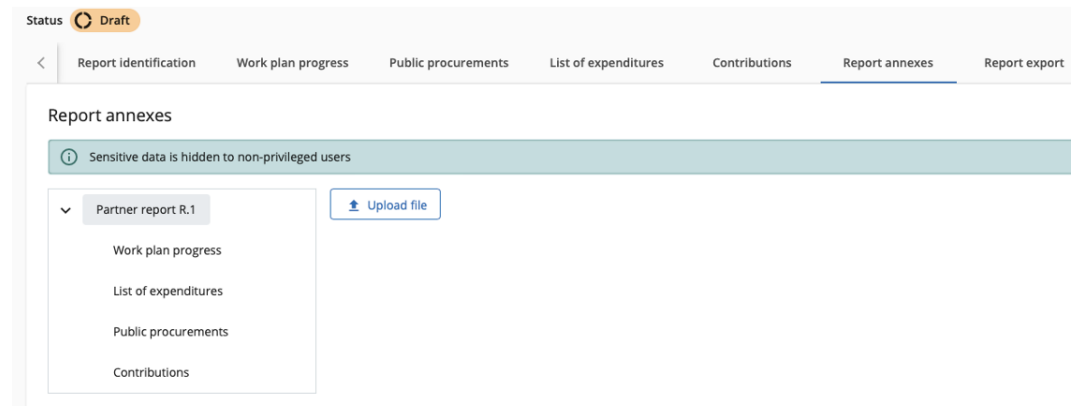
	Partner total eligible budget	Previously reported ⓘ	Current report	Total reported so far	% of total	Remaining budget ⓘ	Previously validated ⓘ	Previously paid ⓘ
IPA III CBC	55.772,75	0,00 parked 0,00	24.656,80 re-included 0,00	24.656,80	44,21 %	31.115,95	0,00	0,00
Partner contribution ⓘ	9.842,25	0,00 parked 0,00	4.351,20 re-included 0,00	4.351,20	44,21 %	5.491,05	0,00	N/A
↳ of which Public contribution	0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00	N/A
↳ of which Automatic public contribution	0,00	0,00 parked 0,00	0,00 re-included 0,00	0,00		0,00	0,00	N/A
↳ of which Private contribution	9.842,25	0,00 parked 0,00	4.351,20 re-included 0,00	4.351,20	44,21 %	5.491,05	0,00	N/A
Total	65.615,00	0,00 parked 0,00	29.008,00 re-included 0,00	29.008,00	44,21 %	36.607,00	0,00	0,00

PARTNER REPORTING SECTION

1.8 “Report annexes” section

In the report annexes section all files uploaded in the different sub-sections of the partner report are shown.

Additional files can also be uploaded here (by clicking on “**Upload file**”). Since it is not always possible to add descriptions to files in the dedicated sections, users with edit right are allowed to add descriptions to all files in this section by clicking on the pencil.



- Files uploaded in this section can be deleted here, other files can only be deleted in the section where they were uploaded.
- The tree structure represents the different sections within that partner report having an upload function. Select a sub section (e.g. “Work plan progress”) to see files uploaded under this sub section.

PARTNER REPORTING SECTION

Status 🔄 Draft

< Report identification Work plan progress Public procurements List of expenditures Contributions Report annexes **Report export**

Report exports

Partner Report budget (Example) export

Partner Report (Example) export

English

Input language

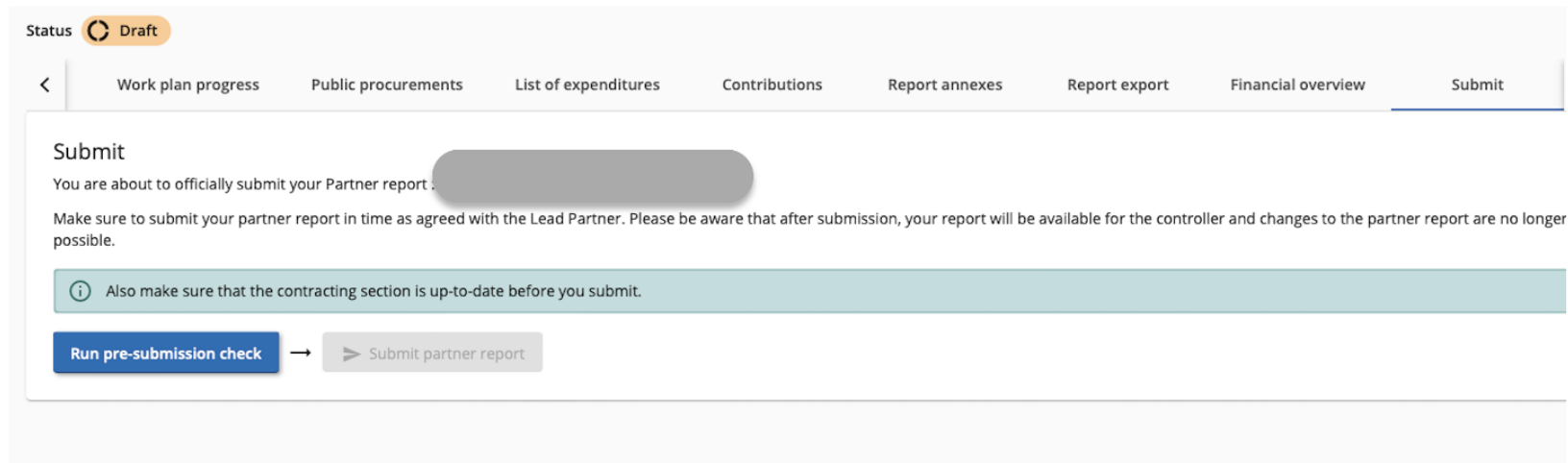
English

Export

PARTNER REPORTING SECTION

1.11."Submission" section

In this section the partner report can be submitted. After submission, the partner report is frozen and the control work can be started.



The screenshot shows the 'Submit' section of a web application. At the top, the status is 'Draft'. Below this is a navigation bar with tabs: 'Work plan progress', 'Public procurements', 'List of expenditures', 'Contributions', 'Report annexes', 'Report export', 'Financial overview', and 'Submit'. The 'Submit' tab is active. The main content area is titled 'Submit' and contains the text: 'You are about to officially submit your Partner report : [redacted]'. Below this is a warning message: 'Make sure to submit your partner report in time as agreed with the Lead Partner. Please be aware that after submission, your report will be available for the controller and changes to the partner report are no longer possible.' A light blue box contains an information icon and the text: 'Also make sure that the contracting section is up-to-date before you submit.' At the bottom, there are two buttons: 'Run pre-submission check' and 'Submit partner report', with an arrow pointing from the first to the second.

Status **Draft**

< Work plan progress Public procurements List of expenditures Contributions Report annexes Report export Financial overview **Submit**

Submit

You are about to officially submit your Partner report : [redacted]

Make sure to submit your partner report in time as agreed with the Lead Partner. Please be aware that after submission, your report will be available for the controller and changes to the partner report are no longer possible.

i Also make sure that the contracting section is up-to-date before you submit.

Run pre-submission check → **Submit partner report**

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Thanks for your attention

FOR JEMS TECHNICAL ISSUE
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