Interreg IPA South Adriatic

Partner Reporting in Jems -Training meeting

24 May 2024

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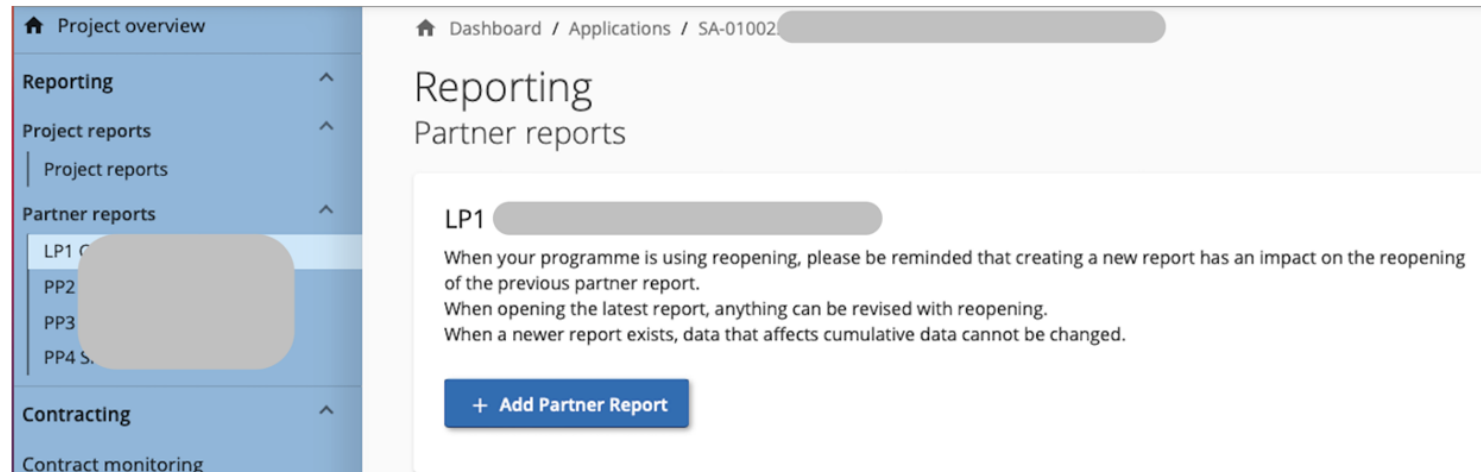
Please carefully check the settings for access to General Data Protection Regulation (GDPR) sensitive data in the "Project privileges".

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".

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 ░░░░░ (CBT)	Enter text here	⬆

Deliverable nr.	Deliverable title	Contribution	Attachments
D 1.1.1	░░░░░ ,Opening Workshop:capitalization action of ░░░░░ topics (CBT)–Workshop kit	☐	⬆

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.

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.

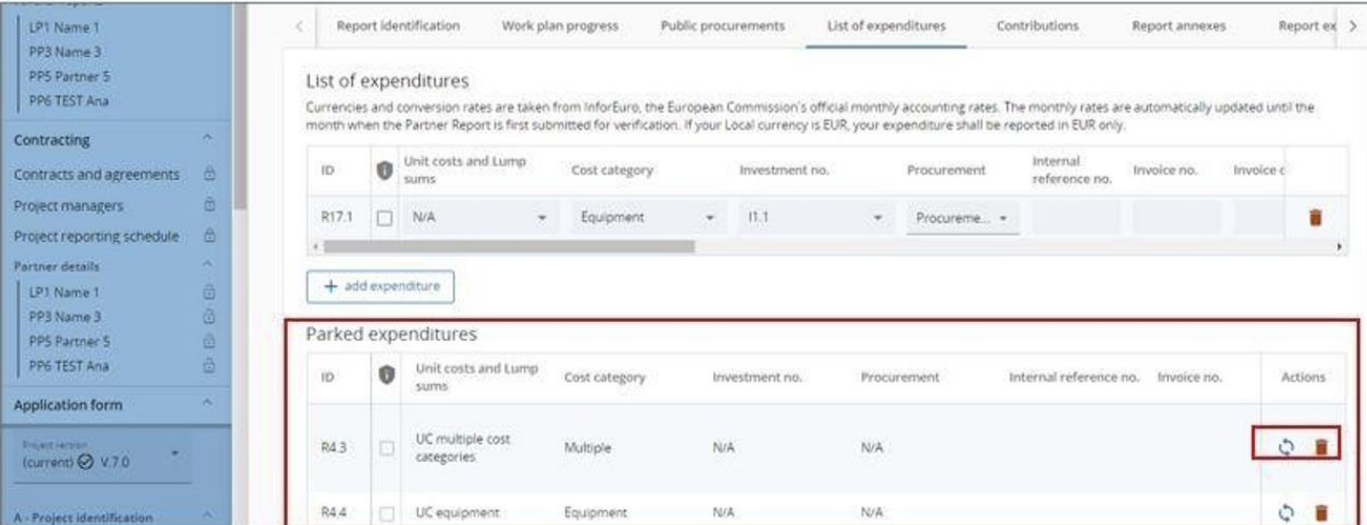**Please note that all the other fields are pre-filled by the system**

PARTNER REPORTING SECTION

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.

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.

PARTNER REPORTING SECTION

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

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.
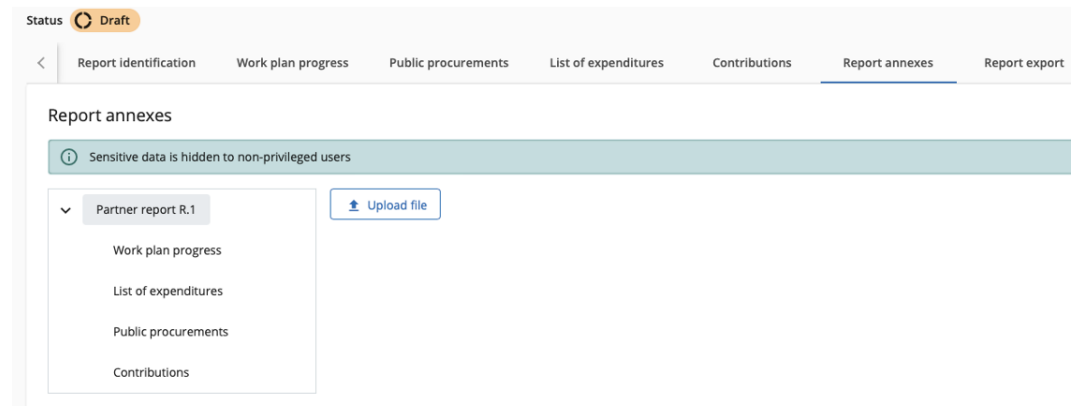
- Files uploaded in this section can be deleted here, other files can only be deleted in the section where they were uploaded.

- 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.
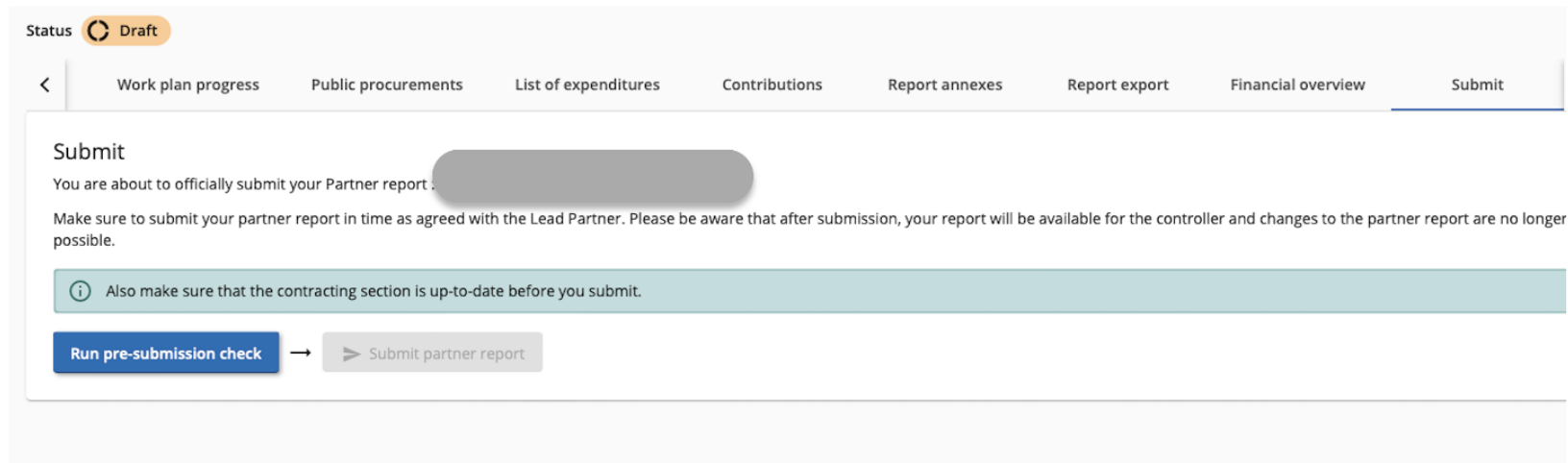
PARTNER REPORTING SECTION

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.

Thanks for your attention

FOR JEMS TECHNICAL ISSUE
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