



## Qualification of innovative floating substructures for 10MW wind turbines and water depths greater than 50m

Project acronym LIFES50+  
Grant agreement 640741  
Collaborative project  
Start date 2015-06-01  
Duration 40 months

### Deliverable D9.8 Periodic report to EC

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## Document information

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### Definitions & Abbreviations

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AST	Administrative Support Team
CA	LIFES50+ Consortium Agreement
DoA	Description of Action
GA	LIFES50+ Grant Agreement
Agency	INEA: Innovation & Networks Executive Agency
RP	Periodic reports
PC	Project Coordinator
PM	Project Manager
WPL	Work Package Leader

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## Executive Summary

This deliverable documents the requirements and content of the LIFES50+ Periodic reports to EC.

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## 1 Introduction

This handbook is the project beneficiaries' main source for Periodic Reports (RPs) to EC procedures throughout the life of the project. The LIFES50+ Grant Agreement (GA) and Consortium Agreement (CA) form the basis for these periodic reporting procedures and the GA and CA will be the primary source of reference in regarding the Periodic reporting procedures.

## 2 Reporting periods

This section presents the LIFES50+ reporting requirements, both in terms of internal progress reports and official EC reporting requirements.

### 2.1 Periodic and Final Reports

The LIFES50+ Grant Agreement (Article 20) specifies the reporting requirements imposed on the Project Coordinator (PC) and each beneficiary as well as third parties. An outline is presented below.

The Project Coordinator is responsible for the official submission of these reports but each beneficiary is required to contribute accordingly. Regarding financial information the LIFES50+ GA (Article 20) defines each beneficiary's responsibility while the Project Manager (PM) will provide reporting templates in due course for the technical progress in order to secure all relevant information being reported to the Project Manager by Work Package Leaders (WPL).

#### 2.1.1 Reporting Periods

LIFES50+ is divided into the following reporting periods (RP):

- RP1: From M1 to M16 (July 2015 to October 2016)
- RP2: From M17 to M28 (November 2016 to October 2017)
- RP3 From M29 to M40 (November 2017 to October 2018)

#### 2.1.2 Periodic Reports – Requests for Interim Payments

The Project Coordinator must submit a periodic report within 60 days following the end of each reporting period.

The periodic report must include the following:

- Periodic technical report (See Annex A)
  - Explanation of the work carried out by the beneficiaries
  - Overview of the progress towards the project objectives, including milestones and deliverables as defined in the LIFES50+ Description of Action as well as any exploitation and dissemination
  - Summary for publication by the Agency
  - The answers to the questionnaire, covering issues related to project implementation in the context of the Horizon 2020 KPIs and monitoring requirements
- Periodic financial report (See Annex B Submitting the financial statement "Form C")
  - Individual financial statement from each beneficiary and linked third party
  - Explanation of the use of resources and the information on subcontracting and in-kind contributions provided by third parties
  - Periodic summary financial statement



Each Work Package Leader is required to submit a periodic report regarding technical progress of the WP in question (on the periodic report template provided by the Project Manager) no later than 30 days following the end of each reporting period (see Section 2.1.1).

Each beneficiary is required to fill in Form C through the EC participant portal no later than 30 days following the end of each reporting period. The Form C for Reporting Period 3 counts as final financial report from each beneficiary.

### **2.1.3 Final Report – Request for payment of the balance**

In addition to the periodic report for the last reporting period, the Project Coordinator must submit the final report within 60 days following the end of the last reporting period. The final report must include the following:

- Final technical report with a summary for publication
  - Overview of the results and their exploitation and dissemination
  - Conclusions of the project
  - Socio-economic impact of the project
- Final financial report
  - Final summary financial statement
  - Certificate on the financial statements

Each Work Package Leader is required to submit a final report regarding the technical results of the WP in question (on the final report template provided by the Project Coordinator) no later than 30 days following the end of the final reporting period.

## **2.2 Quarterly Status Reports by WP-leaders**

Quarterly Status Reports in LIFES50+ are thoroughly presented in deliverable D9.1 (due in M6). The quarterly internal project progress report is split in two; a Word document for progress monitoring (Annex A in D9.1) and an Excel sheet for resource monitoring (Annex B in D9.1). This quarterly status report will be used to satisfy the LIFES50+ periodic progress reporting requirements. D9.1 states that each Work Package Leader will be required to submit a quarterly status report from their respective work package to the Project Manager within 10 working days following the end of the quarter. A template has been provided by the Project Coordinator and made available on the project-internal website. In broad terms this status report will contain information on:

- Technical progress according to DoA
- Deviations
- Actions taken to mitigate deviations

The quarterly status reports will be compulsory required from M7 (January 2016) and onwards until the project ends in M40 (October 2018).

## 2.3 Overview of reporting requirements for the different roles in LIFES50+

Table 1 depicts the reporting requirements for each role in the LIFES50+ project.

Role	Type of Report	When	Receiver
Each beneficiary	Form C	M16+30days	EC
	Form C	M28+30days	EC
	Form C	M40+30days	EC
	Quarterly time sheet (.xlsx)	M1-M40 (+10 days)	PM
Each WP-leader	Periodic report	M16+30days	PM
	Periodic report	M28+30days	PM
	Periodic report	M40+30days	PM
	Final Report	M40+30days	PM
	Quarterly status report (.docx)	M1-M40 (+10days)	PM
Project Coordinator	Periodic report	M16+60days	EC
	Periodic report	M28+60days	EC
	Periodic report	M40+60days	EC
	Final report	M40+60days	EC

**Table 1 Overview of reporting requirements for the different roles in LIFES50+**

## 3 Financial Provisions

This section covers a summary of and reference to Articles in the LIFES50+ Grant Agreement concerning the estimated budget, eligible costs, and third parties and subcontracting and payment modalities.

### 3.1 Budget and Eligible Costs

The estimated budget is found in the LIFES50+ Grant Agreement in Annex 2. It contains the estimated eligible costs and the forms of costs broken down by beneficiary (and linked third party) and budget category (see GA Articles 5, 6 and 14). GA Annex 2 is the original source of the estimated budget for LIFES50+. Definition of eligible costs is found in the GA, Article 6.

### 3.2 Third Parties and Sub-contracting

The Grant Agreement Article 8 states that the beneficiaries must have the appropriate resources to implement the action. If it is necessary to involve third parties, the following Articles in the Grant Agreement apply:



GA Article	Use of third parties
Article 10	Purchase goods, work and services
Article 11	Use in-kind contributions provided by third parties against payment
Article 12	Use in-kind contributions provided by third parties free of charge
Article 13	Call upon subcontractors to implement action tasks described in the LIFES50+ DoA/GA Annex 1
Article 14	Call upon linked third parties <sup>1</sup> to implement action tasks described in the LIFES50+ DoA/GA Annex 1

**Table 2 LIFES50+ involvement of third parties**

### 3.3 Payment Modalities

Payments and payment arrangements are defined in the Grant Agreement (Article 21) with exception-procedures on basis of conditions stated in GA Article 47 (Suspension of payment deadline) and Article 48 (Suspension of payments). An outline is presented below.

The following payments will be made to the Project Coordinator:

- One pre-financing payment
- Two interim payments
- One payment of balance

#### 3.3.1 Pre-financing payment

The aim of the pre-financing is to provide the beneficiaries with a float. It remains the property of the EC until the payment of the balance (see Section 3.3.3).

The pre-financing payment amount is in the GA set to 2,424,945.83 EUR. An amount of 363,741.88 corresponding to 5% of the maximum payment (see GA Article 5.1) is retained by the Agency from the pre-financing payment and transferred into the "Guarantee Fund".

Pre-financing:	2 424 945,83 EUR
Guarantee Fund:	363 741,88 EUR
Actual Pre-financing:	2 061 203,95 EUR

**Table 3 Pre-financing payment amount**

The pre-financing payment was made to the Project Coordinator in compliance with the statement made in the GA and has been distributed to beneficiaries as pro rata payment based on budget. This has been presented and approved in the LIFES50+ kick-off meeting on June 10<sup>th</sup> 2015.

#### 3.3.2 Interim Payments

Two interim payments will be made to the Project Coordinator within 90 days from receiving the periodic reports (due in M16 and M28, see Section 2.1.2). Interim payments reimburse the eligible costs incurred for the implementation of the action during the corresponding reporting periods. Payment is subject to the approval of the periodic report.

<sup>1</sup> The linked third parties in LIFES50+ are stated under Article 14 in the Grant Agreement



The amount due as interim payment is calculated by the Agency in two steps:

1. Application of the reimbursement rates
2. Limit to 90% of the maximum grant amount

### **3.3.3 Payment of the Balance**

The payment of the balance reimburses the remaining part of the eligible costs incurred by the beneficiaries for the implementation of the action. If the total amount of earlier payments is greater than the final grant amount (see GA Article 5.3), the payment of the balance takes the form of a recovery (see GA Article 44).

If the total amount of earlier payments is lower than the final grant amount, the Agency will pay the balance to the Project Coordinator within 90 days from receiving the final report (see GA Article 20.4). Payment is subject to the approval of the final report.

The amount due as the balance is calculated by the Agency by deducting the total amount of pre-financing and interim payments already made from the total final grant amount.

At the payment of the balance, the amount retained for the Guarantee Fund will be released and:

- If the balance is positive, the amount released from the Guarantee Fund will be paid in full to the Project Coordinator together with the amount due as balance
- If the balance is negative (payment of the balance taking the form of recovery) the amount released from the Guarantee Fund will be deducted from the amount released

If the resulting amount (negative balance plus Guarantee fund amount) is positive, it will be paid to the Project Coordinator. If the resulting amount is still negative, it will be recovered.

## **Annex A Periodic report document structure**

This annex describes the requirements that the periodic report must satisfy.

### **A-1. Document identifications**

The document uses the LIFES50+-Deliverable template and extends the existing fields with the identification of the reporting period.

### **A-2. Summary**

The periodical report is basis for an external evaluation, hence the summary section must enable the reviewer to get a detailed opinion. The Grant Agreement document is the official contract with the European Commission, but the periodical report should repeat the necessary sections.

The introductory section explains the LIFES50+ project and states the project context and the main objectives of the project. This summary will be published by the Agency (GA 20.3 §a-iii)

### **A-3. Description of work**

This section lists the relevant work packages with their description as stated in the Grant Agreement.

### **A-4. Work status**

For each work package the document gives detailed explanation of the work carried out. This part is taken from the submitted quarterly reports by the work package leaders. This includes a list of delivered works (all kind of deliverables including restricted access ones) and the submission date in case of public reports. An explanation is given for any delays.

Dissemination is a major aim of this project, hence the periodic reports lists all dissemination actions. This section not only includes the actions from the reporting period, but it includes all dissemination actions in the project so far, since this creates the base for the socio-economic impact evaluation in the final period report.

Milestone have been defined in the Grant Agreement and their passing is reported.

### **A-5. Management issues**

A project running over 40 months is a challenge for the Consortium and only proper project management can ensure that the project is on track and resources are used efficiently.

#### **A-5.1 Consortium changes**

Changes may occur in the participating companies and they have an impact on the project. This section documents which changes have occurred. A non-exhausting list of reads:

- Replacement of a beneficiary, like it happened with Ramboll.
- Replacement of a work package leader (person) with the date
- Any other important personal or members replacement of any project related committee

### **A-5.2 Resource reallocations**

The Consortium Agreements opens for a flexible use of available resources within the project. However, all reallocations must be discussed with the project management and the decisions officially recorded. This section informs about such resource reallocations.

### **A-5.3 Management decisions**

This section lists the management decisions that were necessary to keep the project on track.

## **A-6. Feedback on the project**

The project will receive feedback on its activities during its lifetime e.g when it is presented on conferences and in journals. This section compiles the relevant feedback from such dissemination events which have been further used in the project. The feedback may include paper reviews or important discussions during conference presentations that change approaches or methodologies within work packages tasks.

## **A-7. Meetings**

This section lists major project meetings.

## **A-8. Final report (RP3)**

The final report at the end of the project includes additional sections with respect to the evaluation of the project (GA 20.4 §a). This is the reason why each periodic report contains an aggregated list of dissemination efforts.

### **A-8.1 Conclusions**

All beneficiaries and work package leaders will contribute to this part.

### **A-8.2 Socio-economic impact**

## Annex B Submitting the financial statement "Form C"

The "Form C" statement submission is due in M16 (October 2016) plus 60 days, which gives the Agency some more time to implement the web-interface. A draft mock-up version is available at the EU-portal that gives an impression how the actual submission will work. The following guide is based on that draft version.

### B-1. Obligation of Article 20

Project reporting guidelines – reporting periods for LIFES50+:

- Reporting period 1: 1-16
- Reporting period 2: 17-28
- Reporting period 3: 29-40

The periodic report must be submitted within 60 days following the end of each reporting period.

A ‘**periodic financial report**’ containing:

- 1) An ‘individual financial statement’ (see GA Annex 4) from each beneficiary and from each linked third party, for the reporting period concerned. The individual financial statement must detail the eligible costs (actual costs, unit costs and flat-rate costs; see Article 6) for each budget category (see GA Annex 2).  
The beneficiaries and linked third parties must declare all eligible costs, even if — for actual costs, unit costs and flat-rate costs — they exceed the amounts indicated in the estimated budget (see Annex 2). Amounts, which are not declared in the individual financial statement, will not be taken into account by the Agency.

If an individual financial statement is not submitted for a reporting period, it may be included in the periodic financial report for the next reporting period.

### B-2. Online Reporting

**Participant Portal** – entry point for electronic administration of EU R&I projects; hosts the services for managing the LIFES50+ project throughout their lifecycle.

<https://ec.europa.eu/research/participants/portal/desktop/en/home.html>

The financial statement in structured forms in the grant management system:



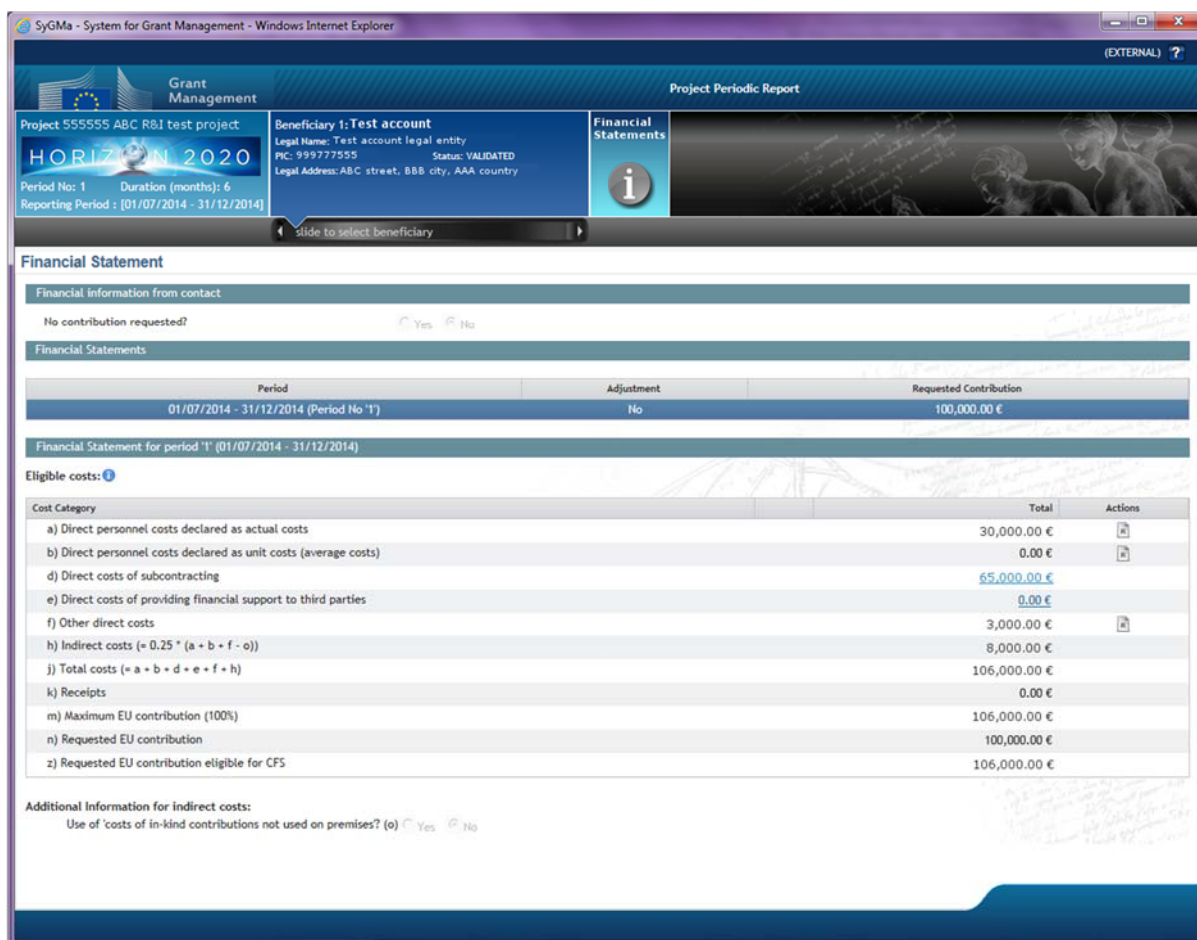
Individual financial statements

**Beneficiaries and linked third parties** must fill these in and submit them to the Commission, as part of the periodic report.



They will be combined automatically by the system into a **consolidated financial statement**.

If you fail to do so, your **costs will be considered 'zero'** for this reporting period (though you can declare them in the next reporting period).



**Project 555555 ABC R&I test project**  
**HORIZON 2020**  
 Period No: 1 Duration (months): 6  
 Reporting Period : [01/07/2014 - 31/12/2014]

**Beneficiary 1: Test account**  
 Legal Name: Test account legal entity  
 PIC: 999777555 Status: VALIDATED  
 Legal Address: ABC street, 888 city, AAA country

**Financial Statements**

Financial Information from contact  
 No contribution requested? ☐ Yes ☒ No

**Financial Statements**

Period	Adjustment	Requested Contribution
01/07/2014 - 31/12/2014 (Period No '1')	No	100,000.00 €

**Financial Statement for period '1' (01/07/2014 - 31/12/2014)**

**Eligible costs:**

Cost Category	Total	Actions
a) Direct personnel costs declared as actual costs	30,000.00 €	
b) Direct personnel costs declared as unit costs (average costs)	0.00 €	
d) Direct costs of subcontracting	65,000.00 €	
e) Direct costs of providing financial support to third parties	0.00 €	
f) Other direct costs	3,000.00 €	
h) Indirect costs (= 0.25 * (a + b + f - o))	8,000.00 €	
j) Total costs (= a + b + d + e + f + h)	106,000.00 €	
k) Receipts	0.00 €	
m) Maximum EU contribution (100%)	106,000.00 €	
n) Requested EU contribution	100,000.00 €	
z) Requested EU contribution eligible for CFS	106,000.00 €	

**Additional Information for indirect costs:**  
 Use of 'costs of in-kind contributions not used on premises?' (a) ☐ Yes ☒ No

You can find a template for your individual financial statement in Annex 4 of your GA, with all the details for eligible costs, EU contribution, etc. and a [sample financial statement](#) in the Periodic report template.

### Explanation of the use of resources & financial statements

Explain in your financial statement how the resources were used during this period: for each cost you declare, you will be prompted to give a justification, by clicking *View/Edit the Use of Resources*.

#### B-2.1 Direct personnel costs- line a)-c)

- Declare here your direct personnel costs a) as actual costs or b) as unit costs (average costs).
- If you are an **SME owner or individual not receiving a salary** /reimbursed based on unit costs, declare your personnel costs in **column A.4 (c)**.
- You need only supply data on the **person-months per work-package** (not per deliverable).
- At this stage, you **don't have to provide details** like names, level of experience etc. (though we may ask you to later).

**Use of in-kind contributions from third parties:** if you need to report any related personnel costs, the system will prompt you for details of the costs, name and type of third party, and whether or not



the costs were planned in Annex 1 or not.

**If the costs were not planned, you must give more explanation.**

### B-2.2 Direct costs of subcontracting - line d)

In this pop-up, break down the total direct costs for the period into the **costs for individual subcontractors**, under *Unforeseen subcontracting not indicated in the grant agreement (Annex 1)* (in addition to the information provided in the technical report - par.1.2).

### B-2.3 Direct costs of Third Parties (not linked third parties) – line a)-d)

- Declare direct cost related to in-kind contributions from third parties in the pop up appearing in the columns for personnel and/or other direct costs, depending of the type of cost.
- If you used any unforeseen in-kind contributions, either for payment or for free, as well as describing them in the technical report (par.1.2), you must specify here the cost of the resources.

### B-2.4 Direct cost of providing financial support – line (e) pop-up

This concerns "cascade funding" and prizes (Article 15, GA). Declare third parties here.

### B-2.5 Other direct costs – line f)

You should have detailed costs related to contracts to third parties for providing goods, works or services in line f9 (Article 10, GA).

- If costs declared under "other direct costs" are **equal to or less than 15%** of the personnel costs, you are claiming for this reporting period, you *do not need to provide an explanation* (though you must still keep all the proof you have of any costs you declare as eligible, in case you are audited).
- If costs declared under "other direct costs" are **higher than 15%** of these personnel costs, then you **must explain other major direct cost items** (*This means costs declared in your accounts according to your internal accounting practices.*) in the table provided in the pop up in line f). You must explain all items apart from those that add up to less than 15% of your personnel costs. Start from the highest-value cost items.

If you are reporting other direct cost items, you must provide:

- if indicated in the DoA** – a simple reference to the DoA
- if not indicated in the DoA** – cost/amount per item, description of the item, nature of item (travel, equipment, other goods & services), work package(s), project relevance/explanation

### B-2.6 Step 1: All beneficiaries receive a notification and log on to the Participant Portal.

At the end of each reporting period, a beneficiary will receive a notification to complete:

- Their own **Financial Statement** (and the financial report of their Third Party, if any).



- Their contribution to the **Technical Part of the Periodic Report** (this is common for all beneficiaries in the project)  
To fill in the information the beneficiary must [log on to the Participant Portal](#) and access the relevant project.

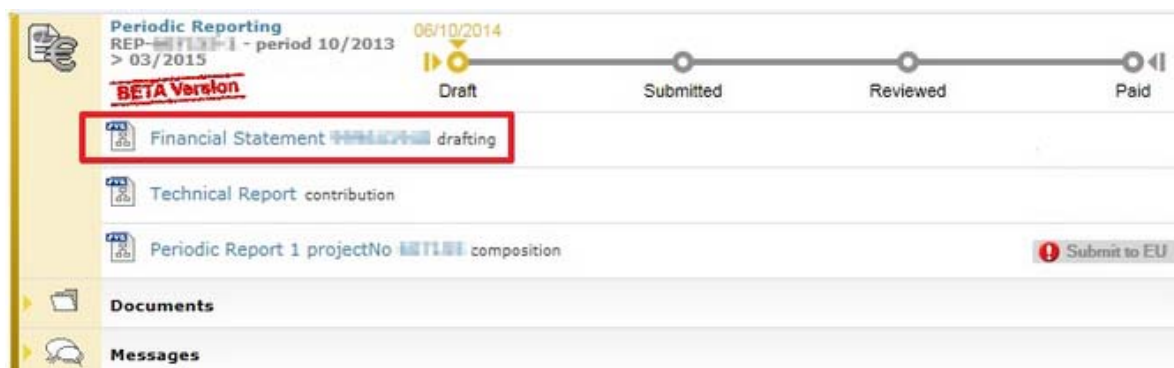
## **B-2.7 Step 2: All beneficiaries complete their own Financial Statement and their contribution to the Technical Part of the Periodic Report. Beneficiaries e-sign and submit their Financial Statements to the Coordinator.**

### **B-2.7.1 Completing your Financial Statement**

#### **B-2.7.1.a Draft the financial statement**


The Participant Contacts usually performs this action (also users with the roles Project Financial Signatories, Coordinator Contacts, Primary Coordinator Contacts and Task Managers can perform this action).

Click on the task "Financial Statement" and complete the costs. Click [here](#) to find more information on how to complete your financial statement.



Complete the requested information and save. Click the Validation button to see whether you have filled in all information correctly, then close the current screen and return to the Participant Portal.





**Grant Management**  
 Project 666098 (666098 REPA Testing REA 7)  
**HORIZON 2020**  
 Period No: 1    Duration (months): 18  
 Reporting Period : [10/06/2012 - 09/12/2013]

Beneficiary 1: shortname for 999997930  
 Legal Name: CENTRE NATIONAL DE LA RECHERCHE SCIENTIFIQUE  
 PIC: 999997930    Status: VALIDATED  
 Legal Address: Rue Michel - Ange 3 , 75794 , PARIS France

Financial Statement

nautopne (EXTERNAL) ?

**Financial Statement**

SAVE

Financial information from contact  
 No contribution requested? ☐ Yes ☒ No

Financial Statements
 

Period	Adjustment	Requested Contribution
10/06/2012 - 09/12/2013 (Period No '1')	No	0.00 €

Financial Statement for period '1' (10/06/2012 - 09/12/2013)

Eligible costs: i


Cost Category	Total	Actions
a) Direct personnel costs declared as actual costs	0.00 €	<span style="border: 1px solid black; padding: 2px;">a</span>
b) Direct personnel costs declared as unit costs (average costs)	0.00 €	<span style="border: 1px solid black; padding: 2px;">a</span>
d) Direct costs of subcontracting	0.00 €	
e) Direct costs of providing financial support to third parties	0.00 €	
f) Other direct costs	0.00 €	<span style="border: 1px solid black; padding: 2px;">a</span>
h) Indirect costs (= 0.25 * (a + b + f + o))	0.00 €	
j) Total costs (= a + b + d + e + f + h)	0.00 €	
m) Maximum EU contribution (100%)	0.00 €	
n) Requested EU contribution	0.00 €	<span style="border: 1px solid black; padding: 2px;">a</span>
z) Requested EU contribution eligible for CFS	0.00 €	

Additional Information for indirect costs:  
 Use of 'costs of in-kind contributions not used on premises?' (o) ☐ Yes ☒ No

Validate


### B-2.7.1.b Lock the financial statement for review


Click the "Lock for Review" button, which will prevent further editing and generate a pdf document.




**Periodic Reporting**  
 REP-~~666098~~ 1.209 -1 - period 10/2013  
 > 03/2015  
BETA Version

06/10/2014  
 Draft    Submitted    Reviewed    Paid


 Financial Statement ~~666098~~ 1.240 drafting



 Technical Report contribution



 Periodic Report 1 projectNo ~~666098~~ composition

Lock for review

Lock for review

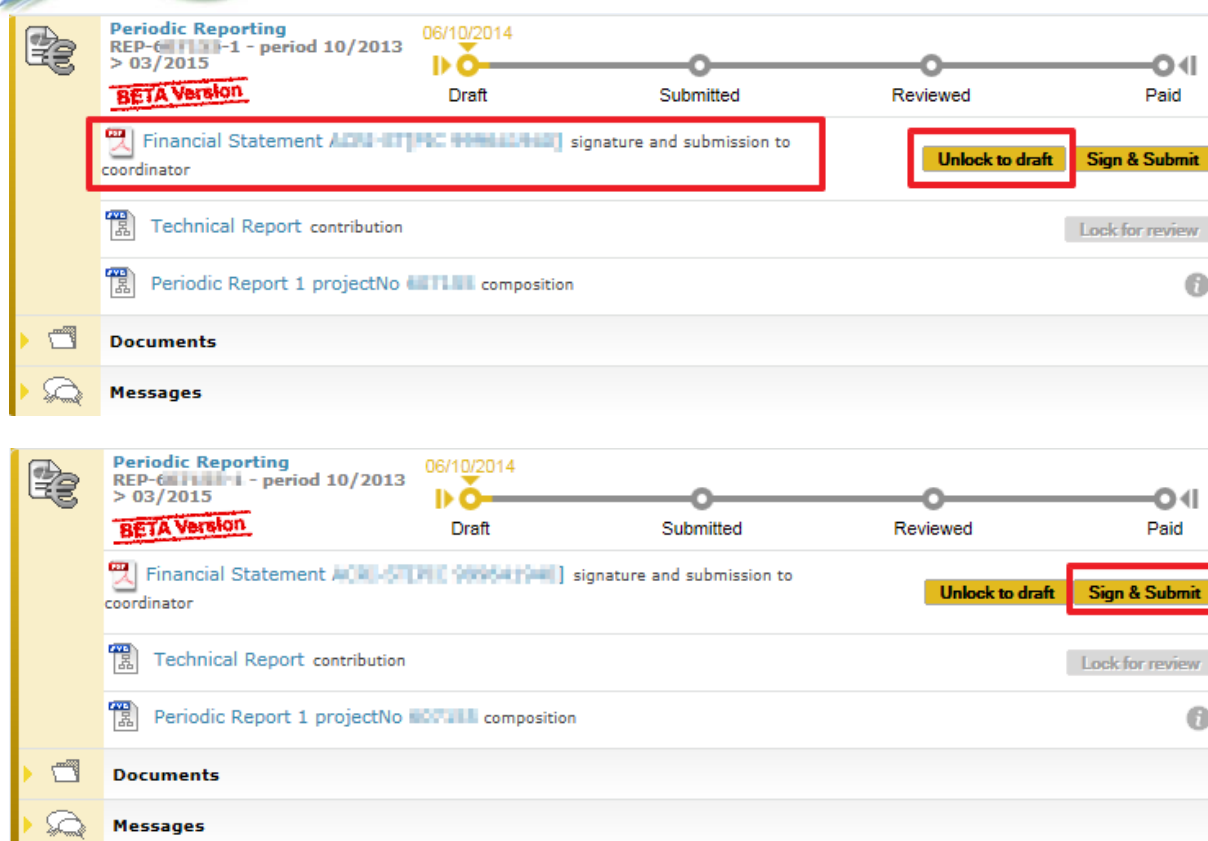
! Submit to EU


**Documents**

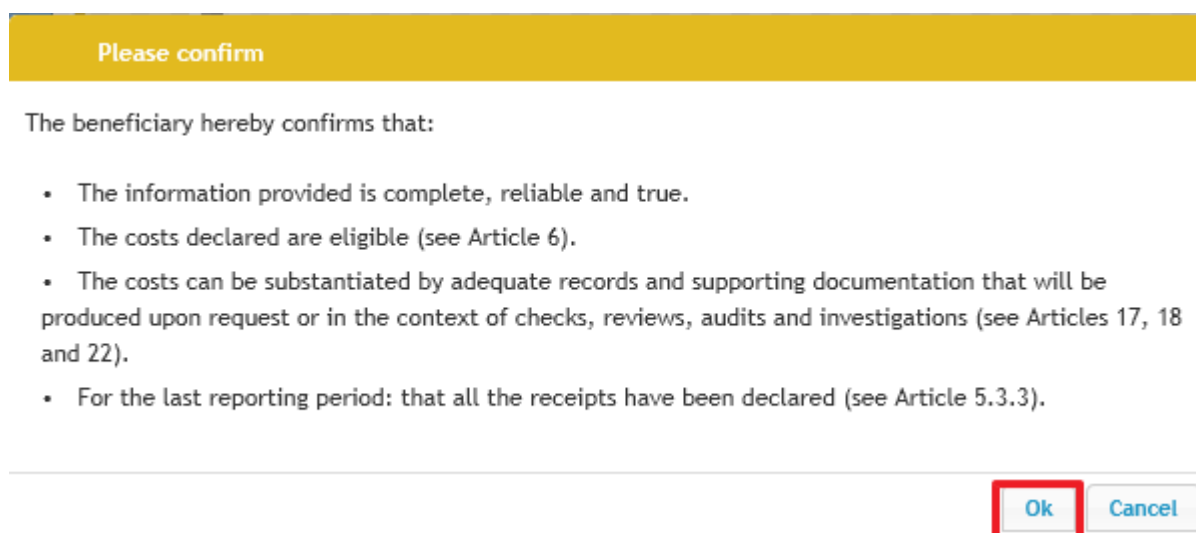

**Messages**

Once reviewed, the Financial Statement can be unlocked ("Unlock to draft") for further editing or electronically signed & submitted ("Sign and Submit") to the coordinator.





The system will then ask you to confirm that the information is valid:



Once you have confirmed, the system will ask you to complete your ECAS password in order to electronically sign the Financial Statement (the comment box is optional).



EUROPEAN COMMISSION AUTHENTICATION SERVICE (ECAS)

External

EUROPA > Authentication Service > ECAS Signature

[Logout](#)
[Change password](#)
[Account information](#)
[Help](#)

! TestOne PARTNER ([Test1.Partner](#)) | External

## ECAS Signature

Welcome **TestOne PARTNER** to the ECAS Signature page. This page allows you to digitally sign a transaction using your ECAS password.

---

The SyGma-PPGMS application is asking you to sign a transaction

The transaction has the following description: **Signature of the financial statement for 633053-1471 as authorised representative of the legal entity ACRI-ST SAS**

[See the complete transaction](#)
[Printer-friendly Version](#)

---

To sign the transaction, please enter your ECAS password

Reason:


Comment

For signature

Password \*

Sign

At this point, you have completed your Financial Statement. Your statement has been electronically signed & submitted to the Coordinator. It is accessible via the task Periodic Report composition. Please click on the Financial Statement pdf to consult the data you have submitted to the coordinator.



**Periodic Reporting**  
REP-633053-1 - period  
01/2014 > 12/2014

01/01/2015

Draft Submitted Reviewed Paid

Financial Statement USTUTT [PIC 999974747] drafting	Lock for Review
Technical Part of Periodic Report contribution	Lock for review
Periodic Report 1 projectNo 633053 composition	Submit to EU

Documents


Messages

Periodic Report 1 project No 896821		Filter	All	Draft	Available	Included
Report Element		Status				
Technical report						
Technical Statement		Draft				
Financial report						
Financial Statement		Draft				
Financial Statement		Draft				
Financial Statement		Sent to CO				
Financial Statement		Draft				
Financial Statement		Draft				
Financial Statement		Draft				
Financial Statement		Draft				

## B-2.7.2 Completing your contribution to the Technical Part

### B-2.7.2.a Complete the technical report

The Participant Contact usually performs this action (also, users with the roles Project Financial Signatories, Coordinator Contacts, Primary Coordinator Contacts and Task Managers can perform this action.)



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10 Jul 2015  
 Draft


Submitted


Reviewed


Paid



 Technical Part of Periodic Report contribution



 Periodic Report 1 projectNo 896821 composition



**Process specific documents**


**Process specific communications**


 Technical Part of Periodic Report contribution


 Periodic Report 1 projectNo 896821 composition


**Process specific documents**


**Process specific communications**

Click on the task "Technical Part of the Periodic Report" to complete the requested information. Click here to find more information on how to complete your technical part of the periodic report. The principle of the technical part is that all beneficiaries contribute to this technical part. When two participants are working on the same data, the data of the beneficiary saving first will be saved, whilst the other participant receives a notification that the data have been changed and that his data are lost.


Then click the "Save" button. Then close the current screen and return to the Participant Portal. The validation button can give you an overview of errors, which prevent you from saving.

[illegible]

### B-2.7.2.b Lock the technical report for review


Only users with the role Coordinator Contact and Primary Coordinator Contact can perform this action.

Click the "Lock for Review" button, which will prevent further editing and generate a pdf document.





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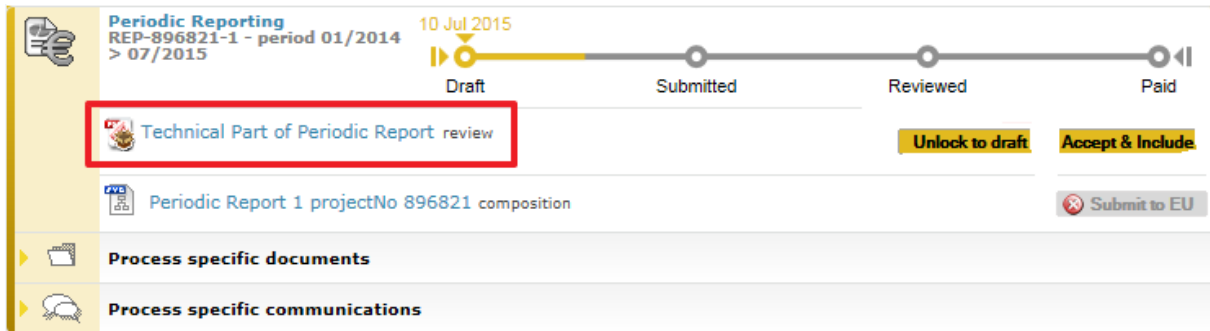


 **Process specific documents**

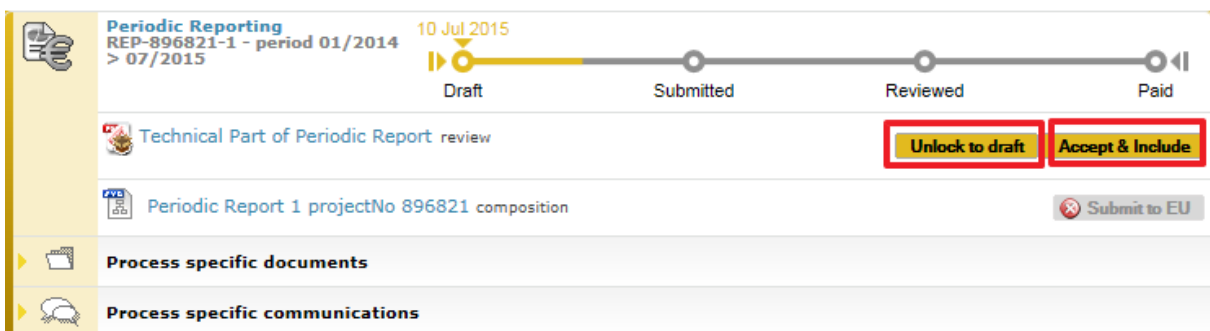
 **Process specific communications**

### B-2.7.2.c Review the technical report and accept and include it for submission to the EU

Only users with the role Coordinator Contact and Primary Coordinator Contact perform this action. ((warning) Note that also users with the roles Financial Signatories, Legal Signatories, Task Managers and Team Members can open the pdf to see the data, but that they can't unlock the data, nor accept & include the report))



Once reviewed, the Technical report can be unlocked ("Unlock to draft") for further editing or accepted and included ("Accept & Include") in the Periodic Report (you might have to refresh the page to see the buttons appear)



### B-2.8 Step 3: The Coordinator approves the elements of the Periodic Report & submits to the EU

The Coordinator must review and explicitly approve those elements of the Periodic Report, which he wishes to submit to the EU. The coordinator can:

- reject a Financial Statement back to a beneficiary for further editing (by clicking the button)
- and/or he can unlock the Technical Part of the Periodic Report for further editing (by clicking the button)

To approve or reject an element of the Periodic Report, click on the task Periodic Report composition. The screen below appears. Click on the Include /Redo button to approve or reject an element (Financial Statement and/or Technical Part of the Periodic Report).

(info) Only users with the role Coordinator Contact and Primary Coordinator Contact can perform this action.


Periodic Report 1 project No 896821			Filter	All	Draft	Available	Included
Report Element	Status	Action					
Technical report							
Technical Part of Periodic Report	Included	Redo					
Financial report							
Financial Statement 896821-1	Draft						
Financial Statement 896821-1	Draft						
Financial Statement 896821-1	Sent to CO	Redo Include					
Financial Statement 896821-1	Draft						
Financial Statement 896821-1	Draft						
Financial Statement 896821-1	Draft						
Financial Statement 896821-1	Draft						

Once the elements of the Periodic Report are approved, the Periodic Report can be submitted to the EU.

The Financial Statements and the Technical Part of the Periodic Report are submitted to the EU in one single submission.

To submit click on the button Submit to EU ((warning) at least one financial statement and the technical part needs to be included for the Submit to EU button to become available).


Only users with the role Coordinator Contact and Primary Coordinator Contact can perform this action.



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**Submit to EU**

**Process specific documents**

**Process specific communications**


The button will be disabled if there are validation errors (in order to be able to submit to the EU at least one Financial Statement plus the Technical Part of the Periodic Report must be provided).



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06/10/2014

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Periodic Report 1 projectNo 896821 composition

**Submit to EU**

Please click to see validation errors

**Documents**

**Messages**

Once you have clicked the Submit to EU button, the system will ask you to confirm that you are aware that certain statements have not been included and that therefore their costs will not be considered for the interim payment. Click the Submit to EU button to submit the periodic report to the EU.



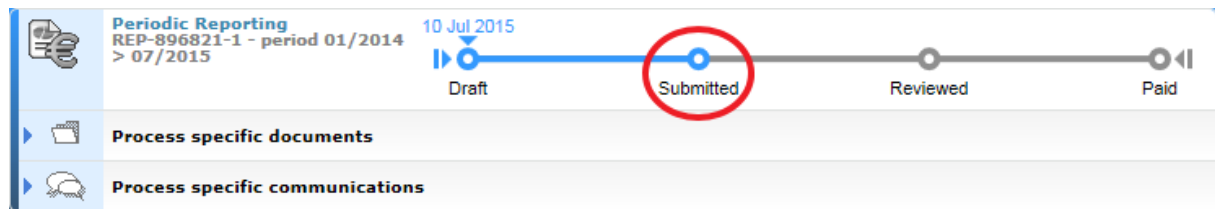
Periodic Report 1 project No 896821
✕

You are about to submit the periodic report to the EU. Press submit to EU to proceed.

☒ I agree with the conditions

Submit to EU

The process goes to the status Submitted and the process box turns blue (this means the process is in the hands of the EU now).



#### B-2.9 Step 4: The EU reviews the submitted Periodic Report and accepts or rejects it

The EU can accept the report and start preparing the interim payment.

The EU can also ask for a revision of the Report, this means that the process described above starts again.

#### B-2.10 Step 5: Interim Payment

The interim payment is performed, which completes this reporting process.