EUROPEAN EDUCATION AND CULTURE
EXECUTIVE AGENCY (EACEA)

eReport
Submission User Guide
(version 1.6.0 of 16/06/2021)

How to complete and submit
a Project Report using eReports

Contents

I. Requirements to access the eReport

1. Technical requirements

The eReports system is an online tool that requires an Internet Browser to be able to complete and submit a report.

Internet Browser

Supported browsers are:

- Internet Explorer 10 and more recent versions
- Firefox 25.0.1 and more recent vresions
- Edge
- Chrome
- Safari is included but not extensively tested due to the proprietary nature of MAC (other browsers also being available on MAC systems)

2. Access requirements

eReports is available via the Funding & Tenders portal (F&TP) and 3 things are mandatories to have access to it, you need a role assigned to the project, an EU Login and the link to the Funding & Tenders portal (F&TP).

a) A role assigned to the project

By default, a role is assigned to all persons of the project consortium (Coordinator, Legal Representative, Partners) that have been encoded in the part A of your application form (or a new person if you request a change to your Project Officer). The right to access tthe eReport is granted to the e-mail address encoded in the EACEA Project Management system for these persons (see your application form).

Technicaly speaking the LEAR is linked with the PIC and has no link with the project. So the LEAR has no access to the eReport unless he is the same person of the project consortium (Coordinator, Legal Representative, Partners) that have been encoded in the part A of your application form (or a new person if you request a change to your Project Officer).

b) The EU Login

ECAS became EU login, for people who already had an ECAS account, this account still valid with EU Login.

If you do not yet have an EU login account, please visit the EU login registration website where you can create your account including an EU login username and password.

Link to registration page: https://webgate.ec.europa.eu/cas/eim/external/register.cgi

A confirmation e-mail will be send to the encoded e-mail address.

It is mandatory that the e-mail address of your EU Login is exactly the same as the one registered in the EACEA Project Management system. If you have any doubt, please contact your Project Officer.

c) The link to the Funding and Tender Portal (F&TP)

https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

d) How to assign roles in the Funding & Tenders portal for a project

Here is a table to summarize the roles assigned by default in the eReport

Project roles	Funding & Tenders portal role denomination	REPORT RIGHTS
Project Coordinator	Primary Coordinator Contact	**View / Edit / Submit** a Report
Project Legal Representative		Access **must be granted by Primary Coordinator contact – see page 5**
Project Partners	Participant Contact	**View / Edit** a Report
All other persons		Access **must be granted by Primary Coordinator contact – see page 5**

Only the Primary Coordinator Contact (Project Coordinator) can give access to the eReports to someone else. If both roles, Coordinator and Legal Representative, are under the responsibility of the same Organisation (same PIC number), then by default the person who is given access to eReport for a specific project is the coordinator of the project (the person listed in the part A.2 of your application form). Here are the steps to assign manually a role to the eReport.
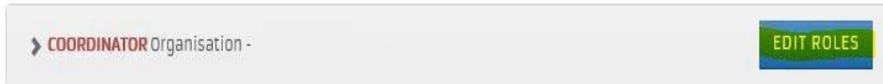
- The Primary Coordinator (Project Coordinator) has to be logged in in the Funding & Tenders portal
- Go to Projects => My project(s)
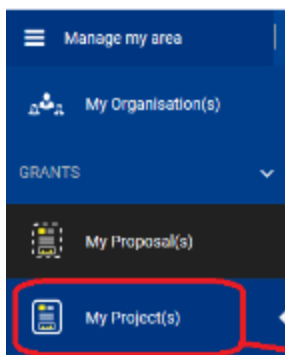
- In Actions choose the "Project Consortium"
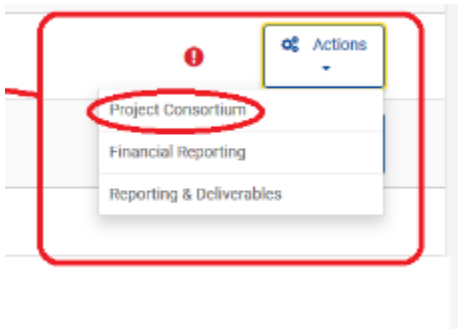
- Click on "Edit Roles" in the organisation you would like to view/add/revoke roles

- A new window will be displayed and all persons with an assigned role to the project will be listed.
- To revoke a role, tick the person and press the "revoke" button at the bottom of the list
- To add a person click on the "Add Roles" button, this screen will appear

- Fill the mandatory fields and press "OK".

Important Note: *The role is associated to the e-mail address, so make sure that it's the one associated with an EU Login account. After pressing "OK", an e-mail will be sent to that e-mail address to notify the person that they have been assigned a role in the project. If there is no EU Login account associated to this e-mail address, the person will be requested to create one.*

II.   Process to fill and submit your ereport

The steps in the reporting process can be seen in the schematic diagrams below.

1. Step 1: Access the Funding & Tenders Portal

In order to fill and submit an eReport, the first thing that you need to do is access the **Funding & Tenders Portal (F&TP).**

Link: https://ec.europa.eu/info/funding-tenders/opportunities/portal/screen/home

Reminder: To access, fill and submit your eReport, the technical and access requirements explained in the Part I of this guide must be fulfilled.

Use your EU Login credentials to **log in** in the Portal:

Funding & Tenders Portal
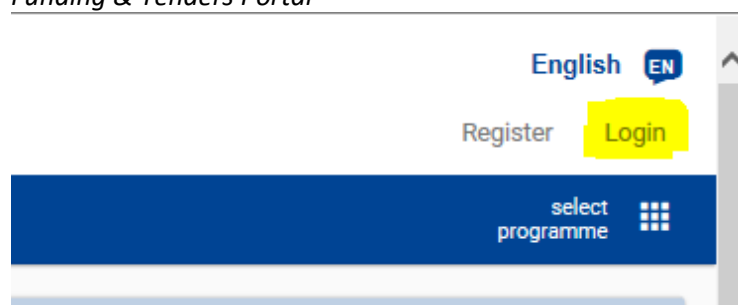
2. Step 2: Access to the report and access rights

Open the section **My Project(s)** in order to have access to the list of your projects.

Funding & Tenders Portal

For the project's ereport(s) you wish to access, click **Manage Projects.**

A new window will open, listing all the reports available for that project:

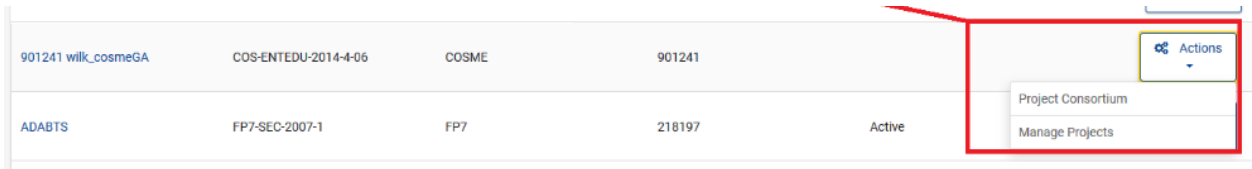| Report	Submission Date	Deadline for Submission	Action
INTERIM REPORT 1		01/01/2017	EDIT
INTERIM REPORT 2			EDIT
TECHNICAL REPORT2	14/10/2020		VIEW

For each report, you will have two different (exclusive) actions available:

View – Gives you access to the report in *read-only* mode. This means that no changes are allowed and neither is submission. This happens when one or both of the following statements is true:

- The report was already submitted;
- The role you have been assigned for the project only allows you to view thereport;

Edit - enables to add new content or edit content of the report, and to submit it.

As explained before, actions in eReports such as View, Edit or Submit are limited only to those who have proper access rights. From the page shown below, it is possible to see the role assigned to your EU login.

To check your role in a selected project, use *Personal Menu* in the top right part of the screen and select the option *My Roles*.
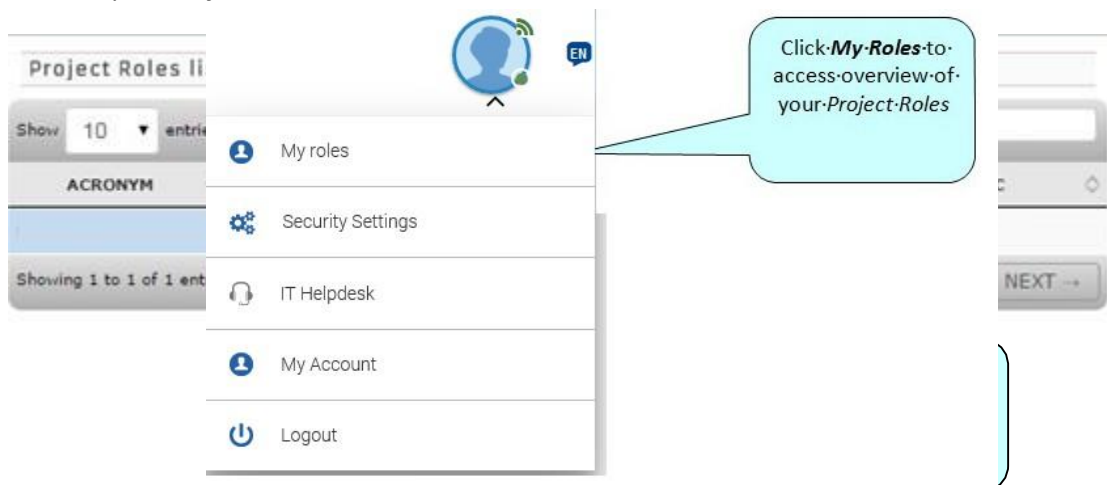
3. Step 3: Complete the report

a) Main Navigation

The contents displayed in eReports are specific to each configured action/activity and therefore the main navigation pane on the image below serves only as an example. Each report, depending on the action the project is part of, might have more or less tabs displayed.

By clicking on the tab you will be redirected to the specific section of the report.
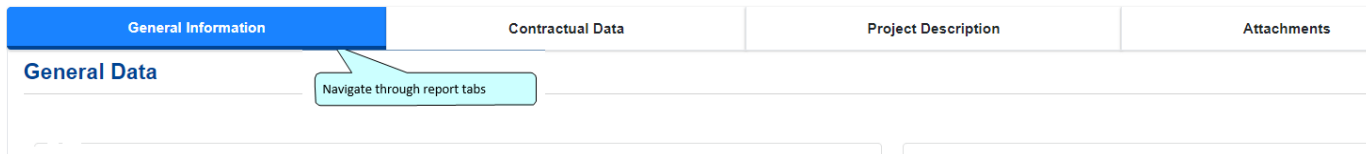
Depending on the tab you click and the configuration of the report, you may have an additional level of tabs with additional information, called *subtabs*.

b) Mandatory fields

The report contains two types of fields:

- Mandatory fields - marked with the symbol ' * ' must be filled, as the ereport cannot be submitted withoutthem
- Optional fields – can be filled, but are not necessary for submission

c) Save and Back to Top

"Save" and "Back to top" buttons are available at the bottom of the screen. "Save" will save your work and "back to top" will move you automatically to the top of the page.

d)   Automatic Save function

eReports includes an automatic save function between Master tabs and subtabs. For a full eReport configuration, the main tabs are the following:
- General Information
- Contractual Data
- Public Summary/Implemented Activities
- Statistics
- Budget
- Grant Sharing
- Attachments
- Submission

Depending the ereport configuration of your project, you can have less Master tabs and the order can also be different.

To save your work properly, go to the bottom of the page and press "save", then ensure that you get the following message:

e)   Dynamic tables in the Statistics subtabs

Depending of the eReport configuration, you can have dynamic tables to fill. These tables are easily recognizable, as you will have the possibility to add or remove rows. These dynamics tables must be filled by following the following steps. If you do not follow these steps, there is a risk of losing the row that you have just encoded.

Steps to encode a dynamic table:
1) Add a row
2) Fill all fields of the row
3) Validate your row by pressing the "VALIDATE" button at the left of the row (not the save button at the bottom of the page, it will remove the row if the row is not validated). Some tables can be larger than your screen, then you will have to lift your table on the left and then press the "VALIDATE" button. The option 'Autofit columns' can help you navigate the table better, should a column title be quite long.
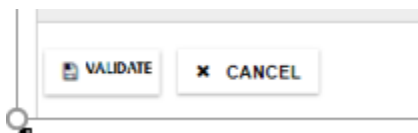
4) Save your work (save button at the bottom of the page) or start again at point 1 of the process

You can add and fill more than 1 row at once without saving but you must follow the steps described before. If you need to encode many rows, do not hesitate to save your work from time to time => "SAVE" button at the bottom of the page.

In case you need to modify a field, just click on the "EDIT" button and of course "VALIDATE" your modification.

You can add information to more than 1 row at once but you must follow the steps described before.

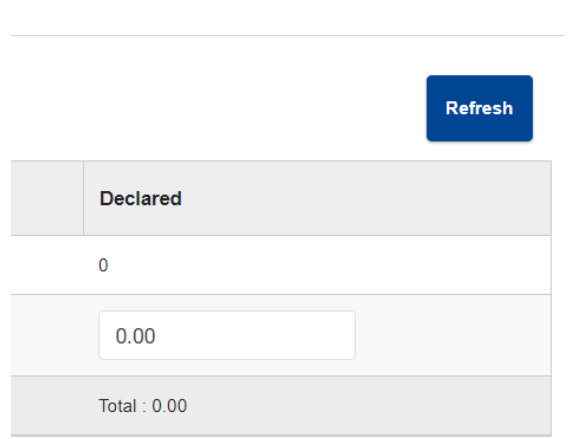Be aware that rows are added at the top of tables and not at the bottom.

f)   Decimals

 Decimals must be encoded with a dot and not a comma

g)   Grant Sharing (when available)

The Grant Sharing tab allows you to specify the division of the grant allocated as the project is about to finish (so available only for final reports).

There is a check on the total Declared column of the Grant Sharing tab, which must be equal to the Declared column of the EU Grant requested of the Budget tab, Incomes subtab. The Grant Sharing tab's Contractual column cannot be changed, but the partnership and the sharing of the amount between organisation may be amended over the course of a project. In such case, and after the amendment signature, press the Refresh button to update the data in the screen:

Beware that the Refresh button will set the amount encoded in the Declared column of the Grant Sharing Screen to 0.

h)   Attached Documents (when available)

Most of the reports include a section to allow annexes to be attached. These annexes are a formal part of the report and, depending on the type of action, may or may not be mandatory.
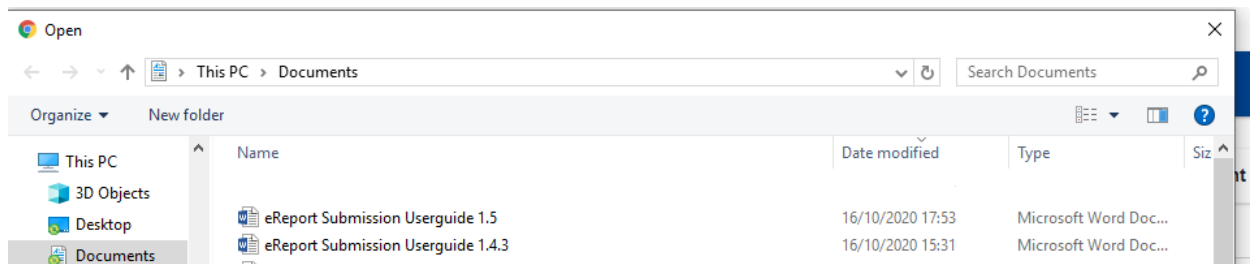
The Attachments section is located in tab Attached Documents (also called simply

'Attachments') and the following screenshot provides an *example* of how it may look:

* Mandatory Field(s).

The attachment can be loaded via the "Select files" button, which browses your files locally:

Before any attachment is saved, it must be uploaded to the system via the "Upload" button:

The "Clear" button allows for the removal of the selected but not yet uploaded file.

When the document is properly uploaded, the name of the document will be in green.

If the name of the document is in red, something is blocking the upload, like the wrong file extension.
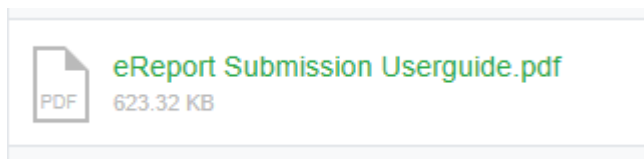
If you need to remove an uploaded file, press the cross on the right of the screen at the filename level.
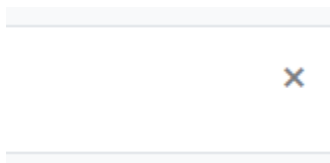
Attachment size limitation

There is a limit to each of your attachments. **10MB** is the limit per attachment. If you receive a message, warning you that the size of document exceeds the maximum allowed, please reduce the size your attachment. For image-based documents, you can start by reducing their images resolution if need be.

You have to avoid special characters in your filename, as the system will not accept documents having special characters. Beware that some software with Rich Formatting, such as Microsoft word, may use

hidden special characters.

i)   Report Preview

Before and after submitting your eReport, you have the option to preview the whole report as a single PDF document. To do so, click on button 'PDF', available at the bottom of the screen.

You will be asked if you want to save the report preview or open it directly. Please select "Open".
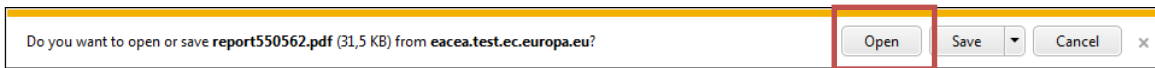
You can also save the PDF in your local machine.

While it is not submitted, the PDF docment is shown with the "**Draft**" watermark.

4. Step 4: Report submission

On the main navigation of the report is the Submission tab.

a) Mandatory fields check

Submission tab automatically perform various checks to ascertain whether your form is ready for submission. For example, the validation will verify that all mandatory fields have been completed and that all the mandatory attachments are present.

If there are any mandatory fields not filled, these will be listed. The following screenshot provides an *example* of how it may look.

Submission

There are Mandatory(*) fields missing

Project Description/Project Description/Background

Project Description/Project Description/Objectives

PDF
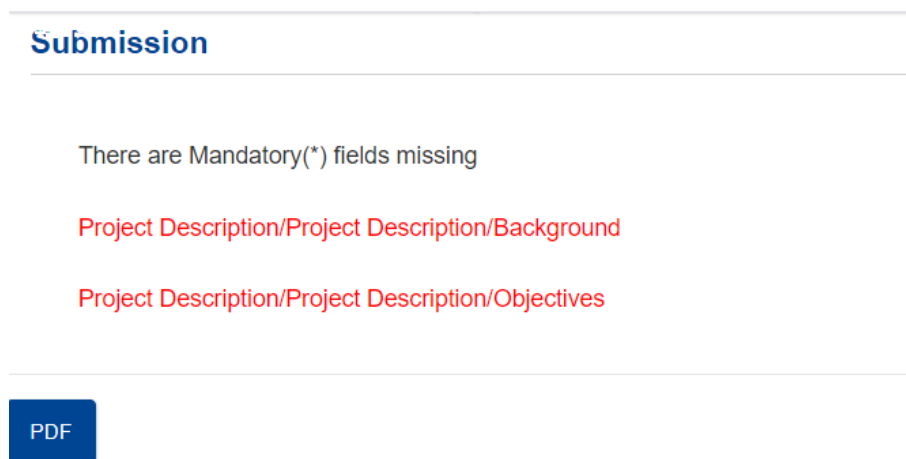
b) Submission of the Report

When all mandatory fields are filled, the report is ready for submission, all messages in the Submission tab have disappeared, and button Submit report is enabled. The following screenshot provides an *example* of how it may look.

Submission

SUBMIT REPORT

PDF
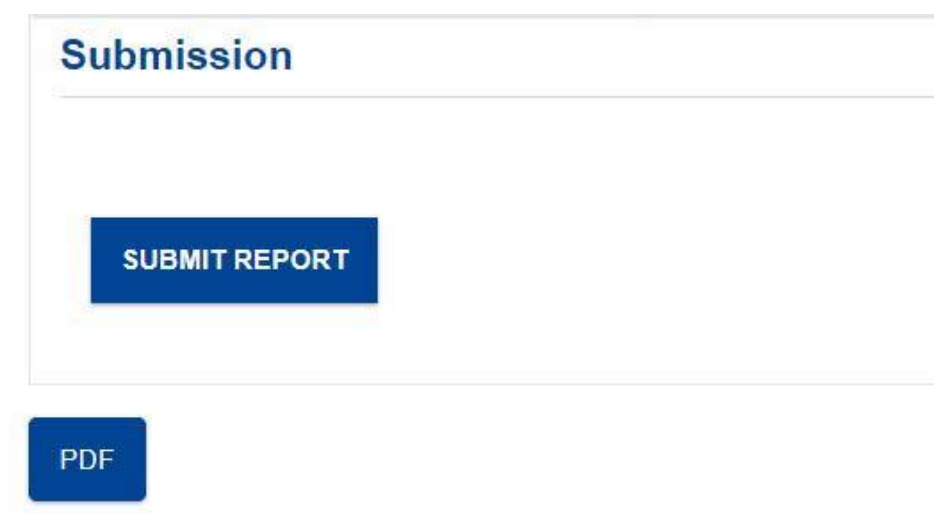
When the submission is complete, you will see:

Report submitted

> **IMPORTANT!!!**
> **Once you have submitted the form, it is not possible to edit**
> **the report anymore.**

Please note that there may be a delay of 45 seconds between clicking submit and the confirmation of submission, depending on the size of the report and attachments.

c)   Acknowledgment of receipt

After a succesful submission of the report, the coordinator of the project will receive an **acknowledgment of receipt** on their email address. Depending on the format of your agreement number (format as 'XXXX-XXXX' or as the Project number 'XXXXXX-CODE-X-YYYY-X-XX-CODE'), the field Grant agreement might be different.

Dear Sir/Madam,

We acknowledge receipt of the Report that you have just submitted electronically with the following reference number:
• Project number 00000-CITIZ-0-0000-1-HH-CCCCC-CCCC
• Decision/Grant Agreement 9999-9999

Yours faithfully,

Education, Audiovisual & Culture Executive Agency (EACEA)

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Madame, Monsieur,

Nous accusons réception de la soumission électronique de votre rapport concernant le projet ayant les références :
• Numéro de projet : 00000-CITIZ-0-0000-1-HH-CCCCC-CCCC
• Numéro de Décision/Convention de subvention : 9999-9999

Salutations distinguées.

L'Agence Exécutive Education, Audiovisuel et Culture

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Sehr geehrte Damen und Herren,

Hiermit bestätigen wir den Eingang Ihres Berichtes, den Sie soeben elektronisch unter der folgenden Referenznummer eingereicht haben:
• Projektnummer 00000-CITIZ-0-0000-1-HH-CCCCC-CCCC
• Entscheidung/Vereinbarungsnummer 9999-9999

Mit freundlichen Grüßen,

Exekutivagentur für Bildung, Audiovisuelles & Kultur

III.   Assistance

If you encounter any issue that is not addressed in this guide, you may need to reach EACEA in order to request assistance.

Please note that if you have issues related to the use of the Participant Portal (user registration, roles and access rights, Proposals, Grants, etc.), you should refer to the FAQ section of the portal through the link: Frequently Asked Questions. If required, you can also submit a specific help request using the Participant Portal contact form, available here.

1.   Technical Assistance

If you encounter technical issues that are not addressed in this guide, you may contact the EACEA Helpdesk to request assistance. The contact details and hours of operation are as follows:

EACEA Helpdesk	Availability
Tel: +32 229 90705 **Email**: eacea-helpdesk@ec.europa.eu	08:30 to 17:30, Monday to Thursday 08:30 to 17:00, Fridays Excluding public holidays and European Commission holidays All times are Brussels time

When contacting the Helpdesk, please have the following information ready or include it in your email message:

- Your telephone number and your email address;
- The entire project reference;
- Your Project Role in Participant Portal and the email address used to login;
- Date and time when the problem occurred;
- The following details regardig the computer you are using to complete and submit the eReport:
    - The operating system and version installed on the computer;
    - The internet browser and version you are using;

- Description of the action you were performing immediately before finding the problem;
- Details of any error messages / error codes that you encountered;
- Screenshots of the problem (if contacting the Helpdesk by email).

2. Non-technical assistance

The EACEA Helpdesk staff are only authorized and trained to help beneficiaries who are encountering technical problems.

If you have questions relating to non-technical issues e.g. if you have a question about the content of the eReport, please contact the programme team or the Project Officer responsible for your project. The mailbox address for the programme team will generally be published on the EACEA website, on the Beneficiaries Space webpage of the programme concerned.

The following table provides some further examples of technical and non-technical questions.

Technical Questions (handled by the EACEA Helpdesk)	Non-technical Questions (handled by the programme team)
I can't save the report I created.	Project information shown are not correct
A dropdown list isn't working.	Why isn't country A in the dropdown list?
I can't attach my budget form (or other annexe/attachment).	I need help with completing my budget form.
I can't add/delete a table row that I have entered.	Why is this field mandatory?
My report freezes/crashes.	One of the partner is not listed
My report is working slowly.	What documents are required for the eReport and where do I send it?
My report won't generate the preview pdf.	I need more characters for my answer!
My report won't submit.	Where are the templates for the attachments and additional documents?
I think there is a bug in the report.	I cannot flag statistics

3. FAQ

"The save button does not give me the message 'Data save successfully' in one or more tabs but works in others":

This means the data inputted in a field may be incorrect, for instance text in a field that accepts only numeric input. Alternatively, decimals in a field accepting only plain numbers. The save button will remain inactive as long as the input is not corrected. If you manage to find it and correct it yourself, the save button will become available again. If not you can contact the Helpdesk to request assistance.

"**I attached a file in the attachments tab by clicking the upload button but then that attachment is not visible anymore, nor are the subsequent ones**":

This means there was a hidden character in the title of the file. Hidden characters are usually added by Rich Text Formatting software such as Microsoft Word. Hidden characters are not allowed in databases in general and in this case, the incriminated file must be deleted by the Helpdesk and its name cleaned by the user before re-uploading it. To ensure it is done, open the Windows notepad (or variant in your system) as notepads do not allow rich formatting and will rid whatever is typed in them of unwanted characters.

"**When I try to view my ereport, an error is displayed or the page hangs**":

The ereport platform is designed to accommodate a large number of ereports being submitted together at once per action, but sometimes several actions have their deadlines on the same day, leading to an unforeseen number of reports being all submitted at once. In this instance, much like anything, never leave the submission of your report to the last day, and usually allow for the submission a few days before, as the same is true of the week before a submission deadline. If not feasible, the number of submission is usually less in the mornings and evenings. Come back and refresh the page whenever possible. Should the problem persist, contact the Helpdesk.

"I tried inputting a line in my table and click the 'Save button' but nothing was saved":

In order to save a line in the eReport platform you must first validate the line, using the 'Validate' button inside the table. Once a line has been validated, it is saved within the table, whether filled or not. The saving of the whole tab is, by contrast, achieved by pressing the save button at the bottom of the page. Note that, in order to validate the line, the mouse cannot stay inside the table line or the table considers that you are still inputting data, and thus cannot validate.

"I tried inputting a dropdown value but it doesn't stay even after I validate":

In this instance, the dropdown value can have a hidden character within that was possibly not caught previously (the values can be created by a wide host of people, at EACEA and other DGs). The solution then is to contact the Helpdesk for technical assistance so they can investigate the database and correct any possible mistake they might find.

"I filled in all mandatory elements in my ereport but I am finding error messages in the submission tab":

This problem can be threefold. Either it refers to a tab that does not exist in your ereport, or it concerns a line in a table that has been filled, but is still signaled as missing, in which cases you must contact the Helpdesk and ask them to investigate.

Another issue that may arise is that your ereport contains options, such as 'yes' or 'no' buttons, where only one can be selected, and they open up to another question related to your choice.
If you change your mind and decide to select the other option, a message will warn you that whatever was inputted in the previous answer's subquestion will be deleted, but sometimes it is not properly deleted, leaving an error message in submission tab.

The solution is to save your current answers elsewhere, change your choice again, and verify that everything was deleted in the previous answer. Then reinstate your current answer.

"My calendar is blocked and I cannot select a date":

The calendar uses a pop up to suggest specific dates, months or even year. Sometimes, due to network issues on private or professional networks, the pop up may freeze and invalid data be entered as a result. In that case, the calendar may stop responding for this specific date field. The solution in this case is to contact the Helpdesk, specifying which date is causing the issue, and ask it be removed from the database.

<u>"I am told my ereport is incomplete after submitting it but I am sure all was filled properly before submission":</u>

There are two PDFs that can be generated when submitting an ereport. One is destined for analysis by the agency, and is sent via the 'Submit' button, only after submission.
The other is a copy of the ereport, unsubmitted or submitted, the unsubmitted version bearing the DRAFT watermark, while the submitted one does not. As a precaution, always download a copy for yourself after submission, via the PDF button.
On days of high volumes of submission and deadline dates, some ereports official pdfs may not be created properly due to high volume of submission. This official PDF can always be regenerated, but having a copy handy can save a lot of time, efforts and unecessary back and forth between you and your project officer.