



HELLENIC REPUBLIC
**MINISTRY OF
DEVELOPMENT AND INVESTMENTS**

USER MANUAL

**PROJECT MONITORING
PROGRESS REPORT**

VERSION 01.00

HISTORY CHANGES		
Version	Date	Change justification
01.00	08/05/2018	Initial Version

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1. Progress Report

1.1 Objective

The objective of this function is to generate, check and search the Progress Report. The Progress Report is generated per Project and is submitted by the Lead Beneficiary to the Managing Authority for processing and approval.

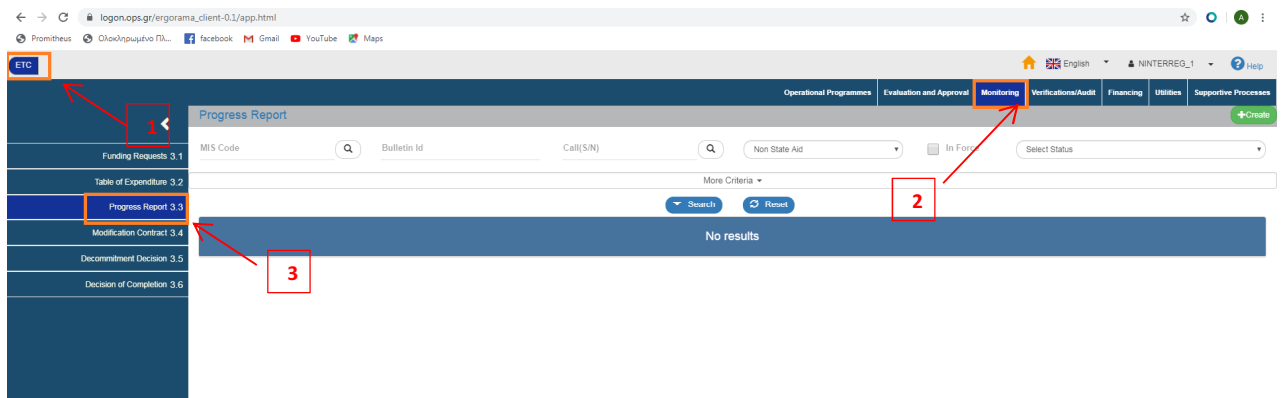
1.2 Prerequisites

To generate a Progress Report, the Application Form status must be "Approved".

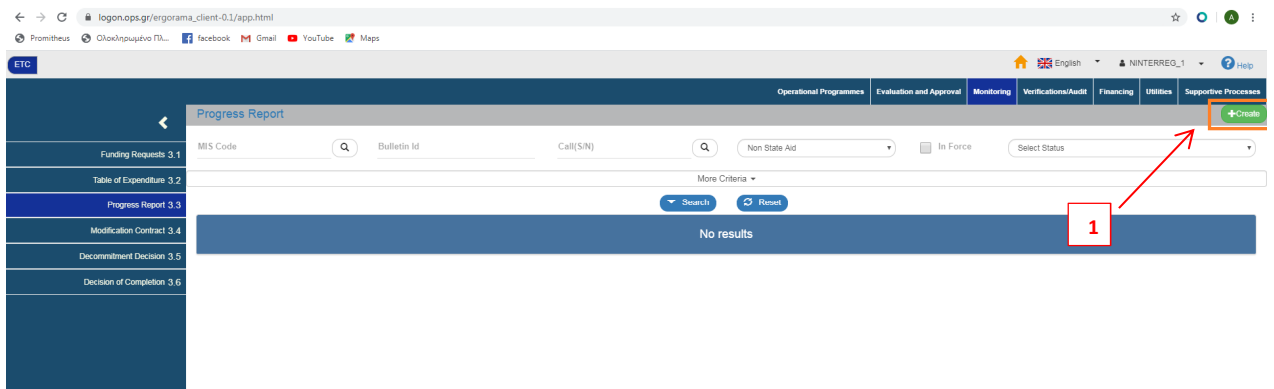
1.3 Generate a Progress Report

To generate a Progress Report, the user takes the following steps:

1. Enter the Project and Program Management System, (see Section 2.1 of the "Application Interface" manual).
2. From the Main Menu of the Project and Program Management System select the path: (1) ETC → (2) Monitoring → (3) Progress Report.



3. On the interface appears the search screen with the fields, as shown on the figure below.



- Click on "Create".
- A pop-up window appears. The user selects "Year" from the drop-down list (1), inserts the S/N of the version of the approved Application Form (select a valid S/N of Application Form unless there are other reasons) in the field MIS "MIS Code" clicking on the search button (lens) (2) and then selects "Accept". (3).

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In case of modification of the Project indicators, new versions must be created for the Progress Report that were already generated in the previous years.

- The system displays the new entry screen "Progress Report – Create".

1.3.1 Section A. General data

- Opening of Section A "General Data".
 - The "Project Title", the "Project Acronym", the "Operational Program", the "AF or Reference" and the "Beneficiary" are filled in automatically by the system.
 - The user fills in the dates in the fields "Reference Period Start" to "Reference period Stop".
 - The user selects YES/No in "Is the Project completed" and if so, when "Date of project completion":
 - Enters the "Date of project completion" in order to include the achieved value of the output indicator in the annual report TABLE 3A – Aggregated value – fully executed projects.
 - Completion of "Bulletin Authors Information" (Name- Surname, Address, Telephone;,

Fax:, Email:)

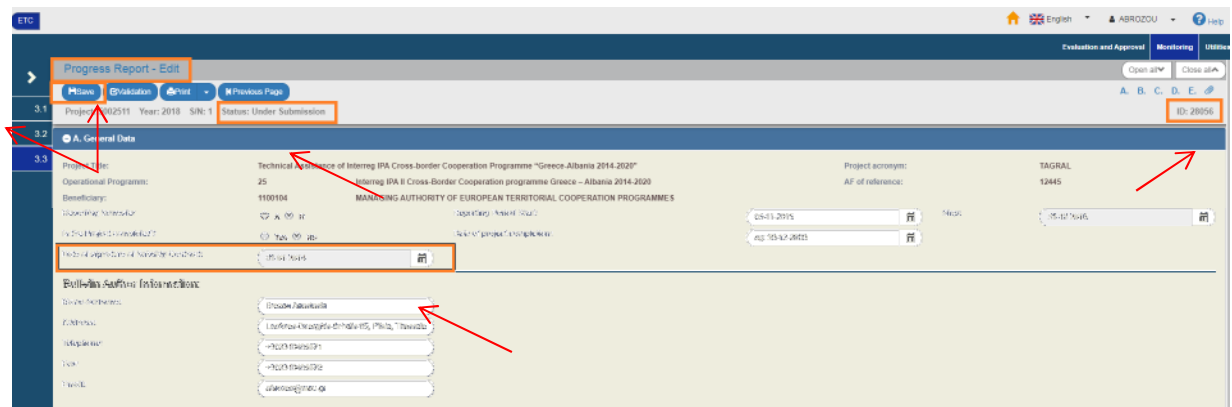
2. Click on "Create" key from the tool bar (menu).

3. A Save message appears. Click on "OK" to close the message and return to the screen.



The system assigns:

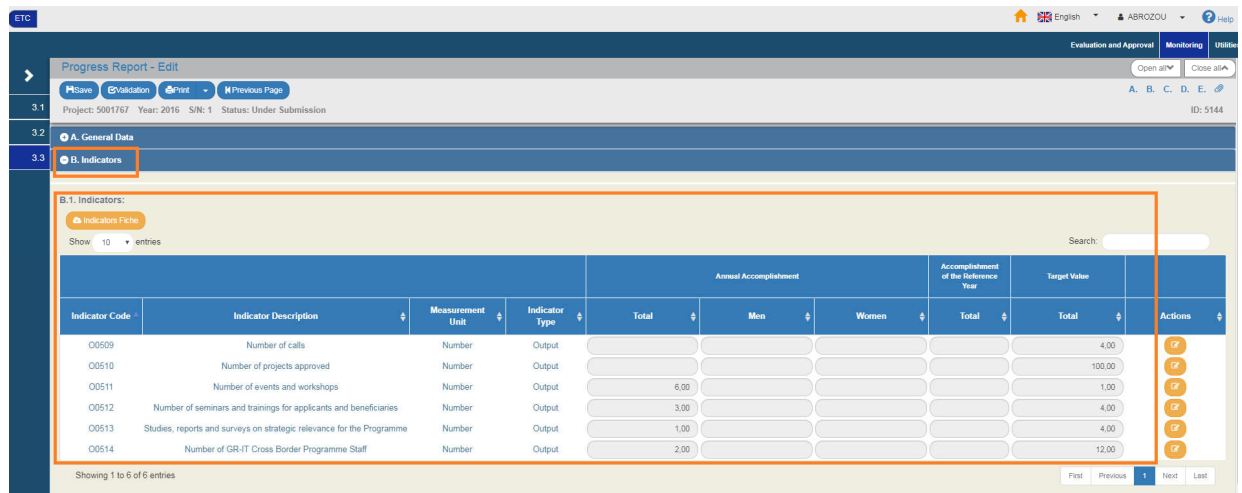
1. The "Under Submission" status to the Report.
2. The unique identification number (id)
3. The Start date of the Project is filled in automatically (Start Date of Project declared in Application Form)
4. The "Progress Report - Create" changes to "Progress Report - Edit" and the "Create" key is replaced by the "Save" key.




4. After the 1st Save, the user continues to enter data in the remaining sections of the Report.

1.3.2 Section B. Indicators

1. Opening of Section B “Indicators”.
2. On Table “B1. Indicators” during the generation of a Progress Report, the indicators from S/N of the Application Form selected on the generation screen of the Progress Report are pre-completed.



3. The user select “Processing”  for each indicator and fills in the achieved value of the indicator for the year of reference of the Report per fund, Investment priority / Thematic Priority, region and, where appropriate, per sex (1), as well as the documentation of the deviations from the target values in the approved Progress Report, if any (2). To inform the lead beneficiary and help him fill in the Progress Report, the achieved value of the previous reference year (3) appears. Select “Accept” (4) to close the window and update the table.



It is noted that depending on the indicator, if any, as defined on the Indicator Identity Table, the achieved value may concern:

- Either exclusively the Report reference year (yearly)
- Or the achievement up to the reference year (cumulative)

User Manual Project Monitoring Progress Report

Indicators

Indicator Code: O0509
Indicator Description: Number of calls
Measurement Unit: Number
Indicator Type: Output
Indicator: Quantitative

Indicator accomplishment: Cumulative, Allocation
Measurement per project: YES
Decimals: YES
Gender relevance: None
Calculated by Participant Record: NO

OP/Axis	Fund	Investment/ Special Objective	Category	Measurement Unit	Cumulative			Accomplishment of the Reference Year	Target Value
					Total	Men	Women	Total	Total
23 / 4	ERDF	SO4.1	Δεν εφαρμόζεται	Number				4,00	
Total								4,00	

Explanation of discrepancies:

Accept Close

Αποθήκευση

- After filling in the data, select “Save” from the tool bar (menu) and continue entering data in the remaining sections of the Report.

1.3.3 Section C. Progress activity report

ETC

Progress Report - Edit

Project: 5001767 Year: 2016 SIN: 1 Status: Under Submission

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Summary of the project's achievements so far:

Technical assistance budget is used in order to support a range of activities and tools that are instrumental to achieving the specific objective of this axis, which is to implement efficiently the GR-IT Cross Border Programme. It has achieved so far: 1) the technical, organizational and administrative support for the implementation of the projects and actions of the programme, 2) the effective monitoring of the implementation of the programme and 3) the diffusion of information about the programme.

Summary of the project's achievements during this reporting period:

Actions related to the management and coordination of the programme, information and publicity of the programme, travelling & accommodation of the staff of JTS and MA, external expertise and services, equipment, and general operational costs. More specifically, two Monitoring Committee meetings were organized, the 1st on 05/04/2016, in Athens and the 2nd on 09 and 10/06/2016, in Corfu, four technical meetings (27/4/2016 in Athens, 14/7/2016 in Thessaloniki, 27/7/2016 in Thessaloniki, 4/11/2016 in Thessaloniki); the ECDAY was organized in Arta and three info days (09/2010 in Patra, 7/9/2010 in Argostoli and 9/9/2010 in Ioannina).

Analytical description of the implemented actions, outputs and results during this reporting period:

In WP1 "Staff Costs" costs incurred to cover the personnel costs of JS Greece-Italy
In WP2 "Management & Operation of the Programme Bodies" General Operational Costs, Office Equipment and others and IT Hardware and Software are included.
In WP3 "Travel and Accommodation Costs" are covered all the Traveling and Accommodation costs of the members of MA, JS relating their participation in Monitoring committees, Technical meetings, workshops etc.
In WP4 "Travel and Accommodation Costs" are covered all the Traveling and Accommodation costs of the members of MA, JS relating their participation in Monitoring committees, Technical meetings, workshops etc.

Next steps to be taken for project's implementation:

The project will be fully activated, so more costs in all WPs will be declared.

Problems encountered and proposed solutions:

Changes in the Implementation:

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the columns “Contracted budget” & “Reporting Period Payments” (3) and the field of the text “Deviations from the original plans” (4).



It is possible to adjust the size of the text field by left clicking on the lower right angle of the field and shifting the mouse.

- After entering the data, press on “Save”  from the tool bar (menu) and continue entering data in the remaining sections of the Report.

1.3.5 E. Publicity

- Opening of Section E “Publicity”. The User selects YES/NO to the question “Have the requirements of the Structural Funds been met in terms of publicity and information measures” (1) and fills in any “Comments” (2).

- The completion of the mandatory fields for each Report is verified through validation checks. If the user clicks on “Validation” key from the tool bar (menu), the systems performs a validation check and a pop-up window appears, which is either blank:

or displays errors – notifications detected.



If the user clicks on "OK", he disables the window and after correcting-updating the data, he may move on to SUBMIT.

3. By clicking on "Print" from the tool bar, the user has the option to print in pdf, or doc format the Progress Report. If necessary, the user may attach documents in the section "Attachments" of the Report.

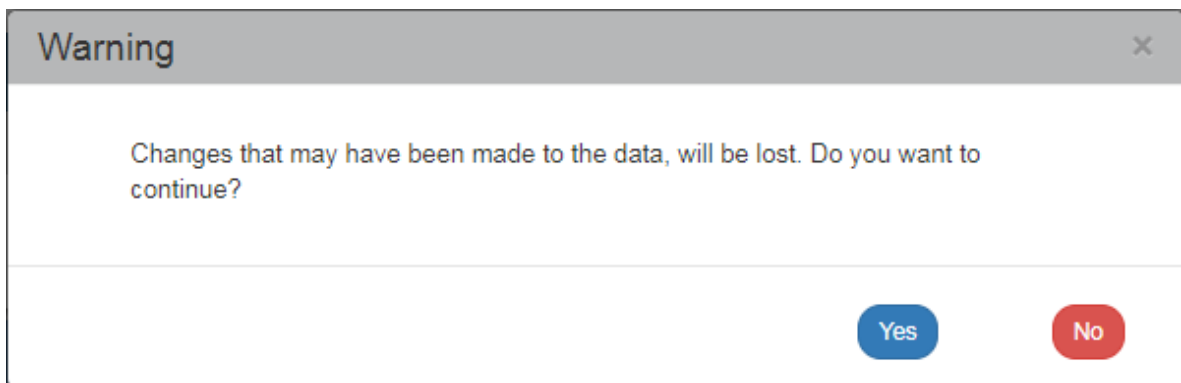


Section 2.5.2 of the "Application Interface" manual describes in detail the way to add, edit, delete and receive attachments.

4. "History": On the table appears the History Changes (Date and Time, Bulletin Status, User's Name, Comments, E-mail recipients).
5. Finally, the user selects "Previous Page" from the tool bar (menu) to return to the search menu.

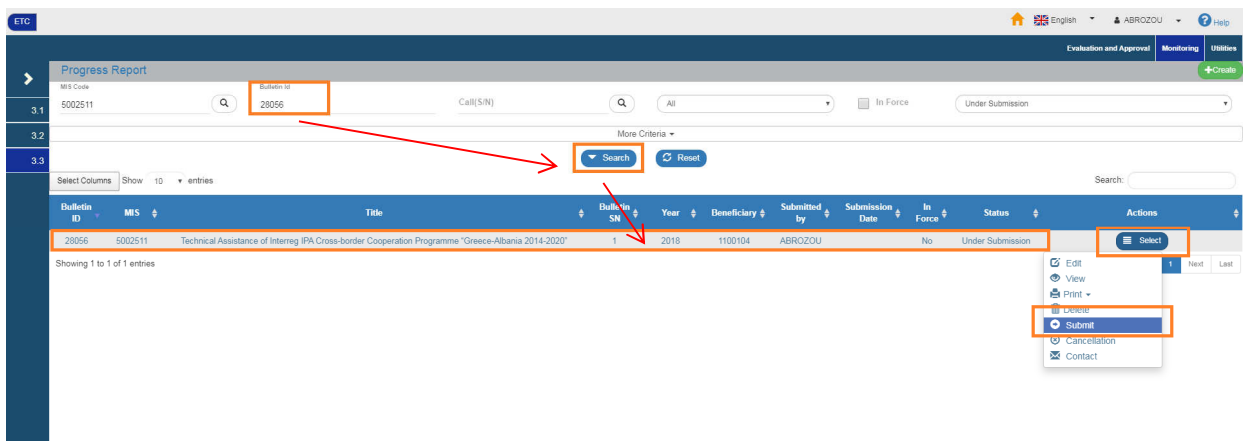



If the user clicks on "Previous Page" , the system displays the following warning message:




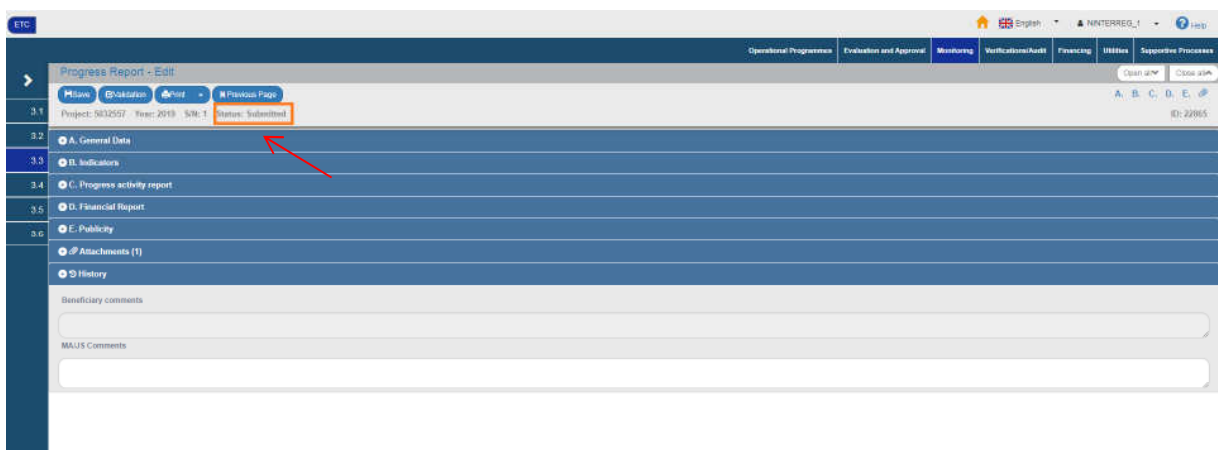
If the User enters data and does not wish to save then, he clicks on "Yes" to return to the search menu. Otherwise, he clicks on "No", saves, selects "Previous Page" and clicks on "Accept".

6. After filling in the Report, in order to make it available to the Managing Authority, the User must submit it.



 Section 2.6 of the "Application Interface" manual describes in detail the way to SUBMIT a Report.

 After submission, the status of the Report changes to "Submitted" and the Lead Beneficiary can no longer edit but only review it.

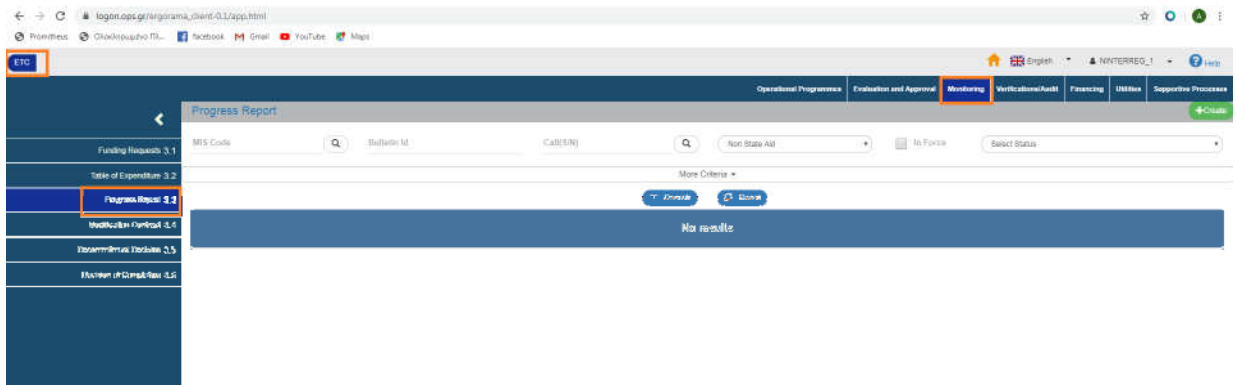


1.4 Processing of the Progress Report by the Managing Authority / Joint Secretariat

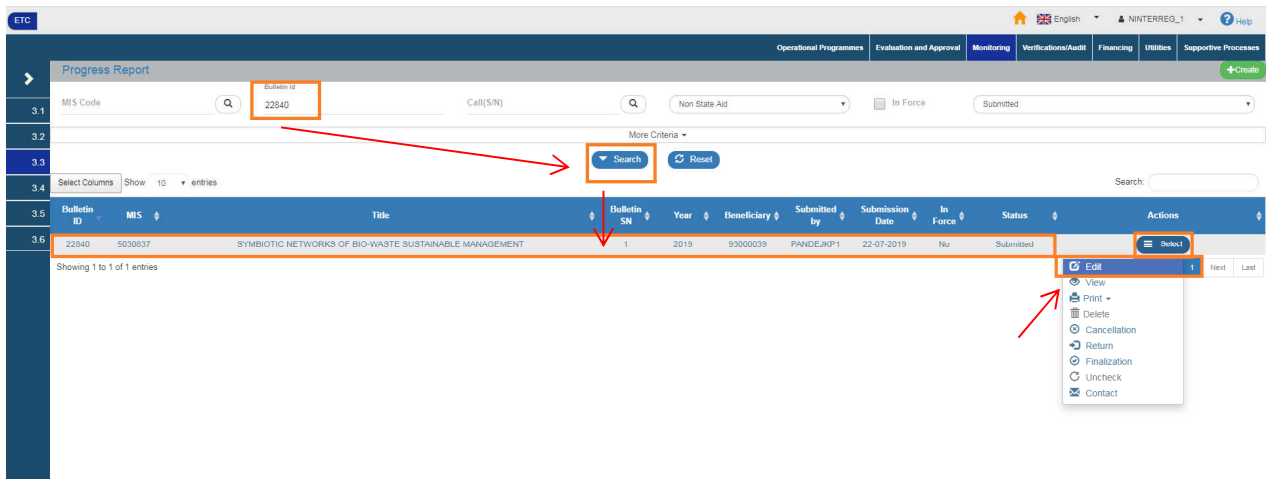
For the processing of a submitted Progress Report by the Lead Beneficiary, the user MA/JS takes the following steps:

1. Enters the Project and Program Management System (see Section 2.1 of the "Application interface" manual).
2. From the Main Menu of the Project and Program Management System, he selects the path: (1) ETC → (2) Monitoring → (3) Progress Report.

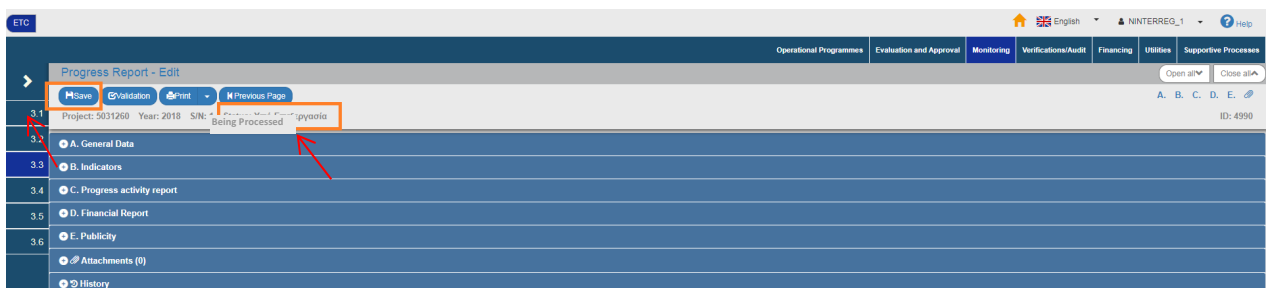
User Manual Project Monitoring Progress Report



- On the interface, the search screen appears where the user MA/JS makes a search of the Report and clicks on “Processing” from the search table or results:



- The Report is activated, the user MA/JS checks the data in sections A, B, C, D, E and the Attachments and can complete or correct the data. Then, he selects “Save” (1) and the Report status changes from “Submitted” to “Being processed” (2).



The user MA/JS has the possibility inter alia:

- To return the request to the Lead beneficiary for correction and re-submission (action “Return”)
- To put it in “Accepted” status (action “Finalization”)
- If the MA does not accept the Progress Report, it can cancel it (“Cancellation” action).

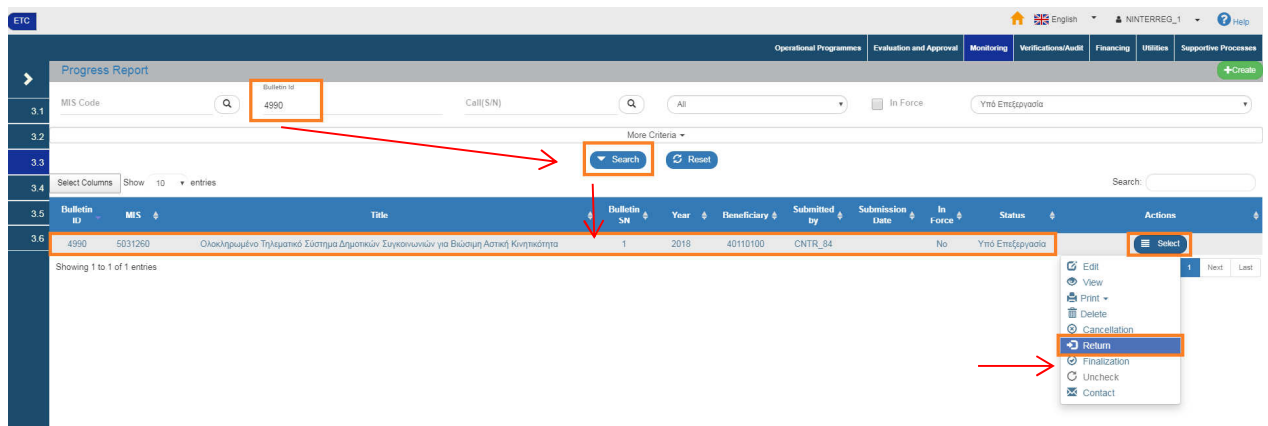


Reference is made below to the Return, Finalization and Cancellation of the Report and to Section “1.6 Progress Report Actions” which refers to all the actions of the Lead Beneficiary and the MA/JS.

1.4.1 Return from the MA/JS to the Lead Beneficiary

For the Return of a submitted Report to the Lead Beneficiary, the user MA/JS takes the following steps:

1. A search menu appears on the search screen and the User makes a search of the Progress Report and selects the “Return” action on the table of Search results.



2. The system activates the screen for a new recording of a “Progress Report – Return” and the user MA/JS selects “Return” from the tool bar (menu).



3. On the pop-up window that appears, the User fills in the field with a detailed description of the cause of return.

Action Confirmation

Warnings

0

For Actions 'Submit' and 'Return' you can send a small message to acceptor. (up to 500 characters). For further actions you can leave a comment or note.

Do you want to continue Return ?

OK Cancel



Upon its Return, the Report status changes to “Return to Beneficiary”. When the user makes changes and saves them, its status will change to “Under Submission” and he must re-submit the request to the MA/JS.

1.4.2 Finalization by the MA/JS

For the Finalization (Accepted) of a submitted Report to the Lead Beneficiary, the user MA/JS takes the following steps:

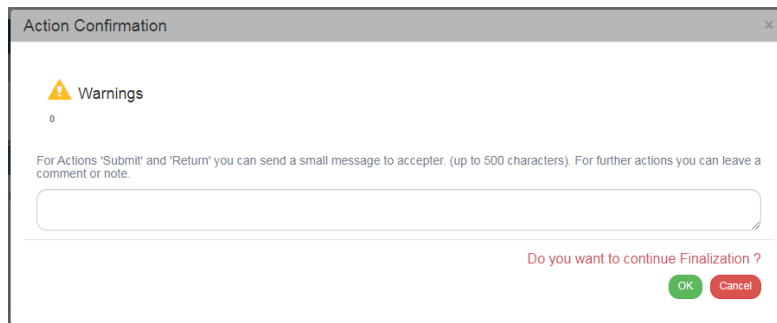
1. On the search menu appears the search screen and the User MA/JS makes a search of the Report and selects the “Finalization” action on the table of Search results.

The screenshot shows the 'Progress Report' search interface. The search criteria '22965' is entered in the MIS Code field. The search button is highlighted with a red box. Below the search results table, the 'Finalization' action is selected from the 'Actions' menu, also highlighted with a red box.

2. The system activates the screen of new entry “New Progress Report – Finalization” and the user MA/JS selects “Finalization” from the tool bar (menu).

The screenshot shows the 'New Progress Report - Finalization' screen. The 'Finalization' button is highlighted in the toolbar. The main content area shows the report details, including the title 'LOCAL BUSINESSES & SOCIAL ENTERPRISES INCUBATORS IN THE FIELDS OF CULTURE TOURISM & FOLK TRADITION'.

3. A pop-up window appears with a field for a detailed with a detailed description of the cause of finalization:

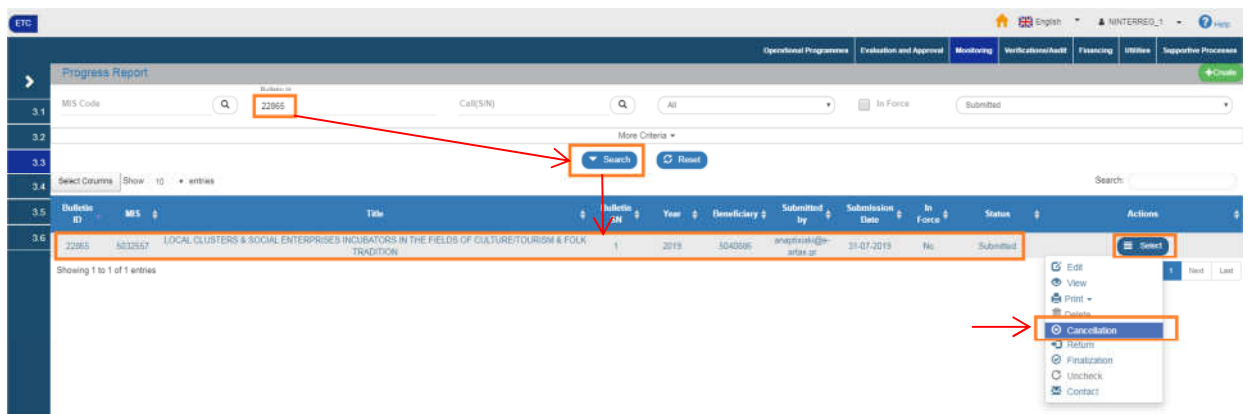


After finalization, the Report status changes to “Accepted”.

1.4.3 Cancellation by the MA/JS

To Cancel a submitted Progress Report to the Lead Beneficiary, the user MA/JS takes the following steps:

1. On the search menu appears the search screen and the User MA/JS makes a search of the
2. Report and selects the “Cancellation” action on the table of Search results.

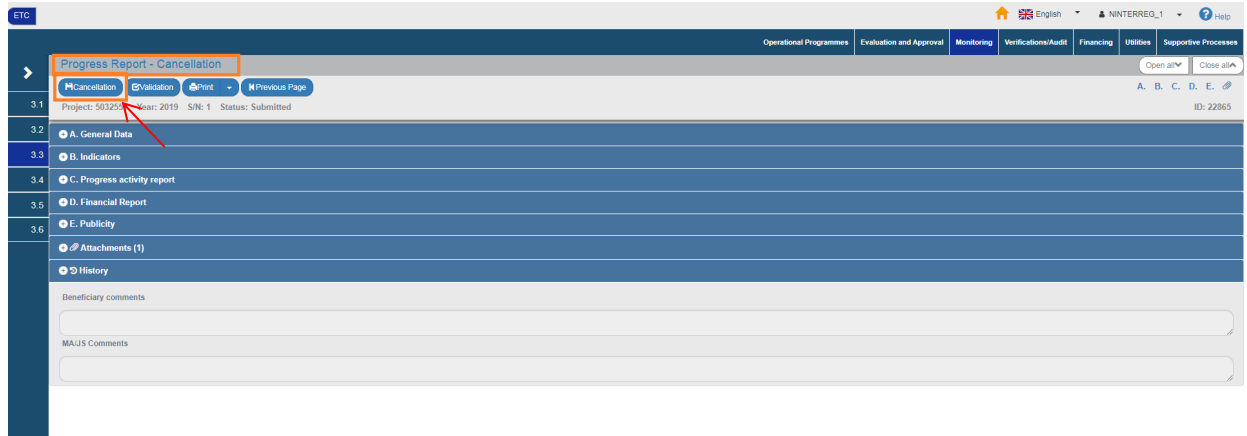


3. The system activates the screen for recording a new “Progress Report – Cancel” and the user MA/JS selects “Cancel” from the tool bar (menu).

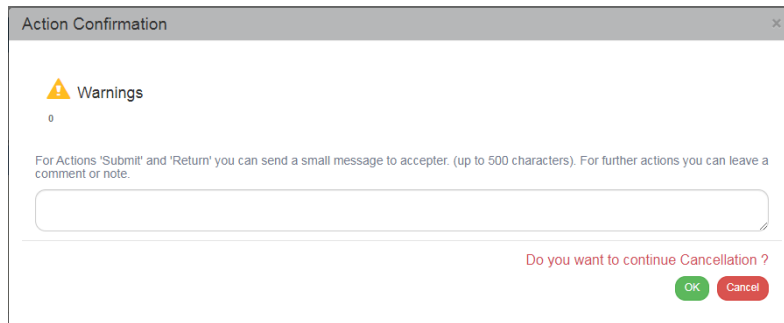
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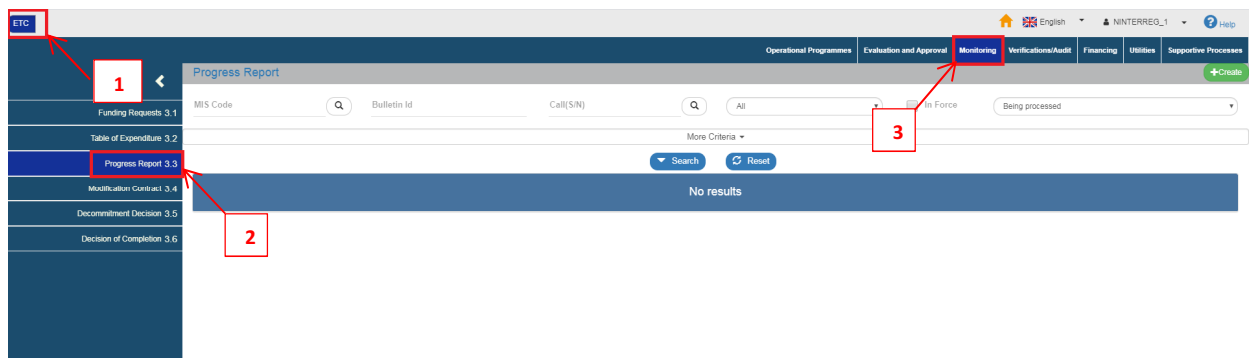
4. A pop-up window appears with a field for a detailed description of the reason for canceling:



After finalization, the Report status changes to “Invalid/Disabled”.

1.5 Searching a Progress Report


1. Enter the Project and Program Management System (see Section 2.1 of the “Application Interface” manual).
2. From the Main Menu of the Project and Program Management System, select the path: (1) ETC → (2) Monitoring → (3) Progress Report



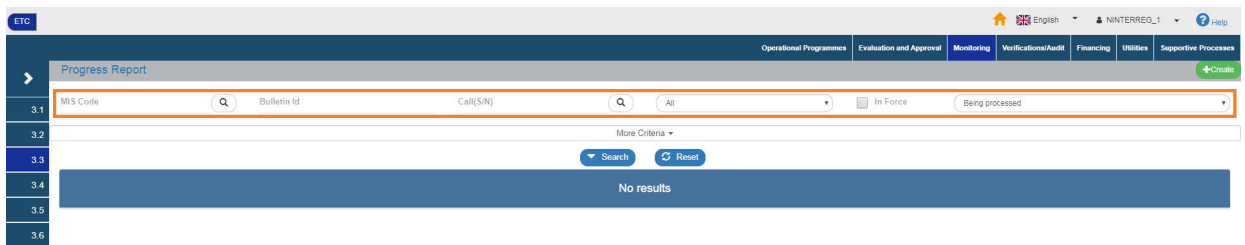
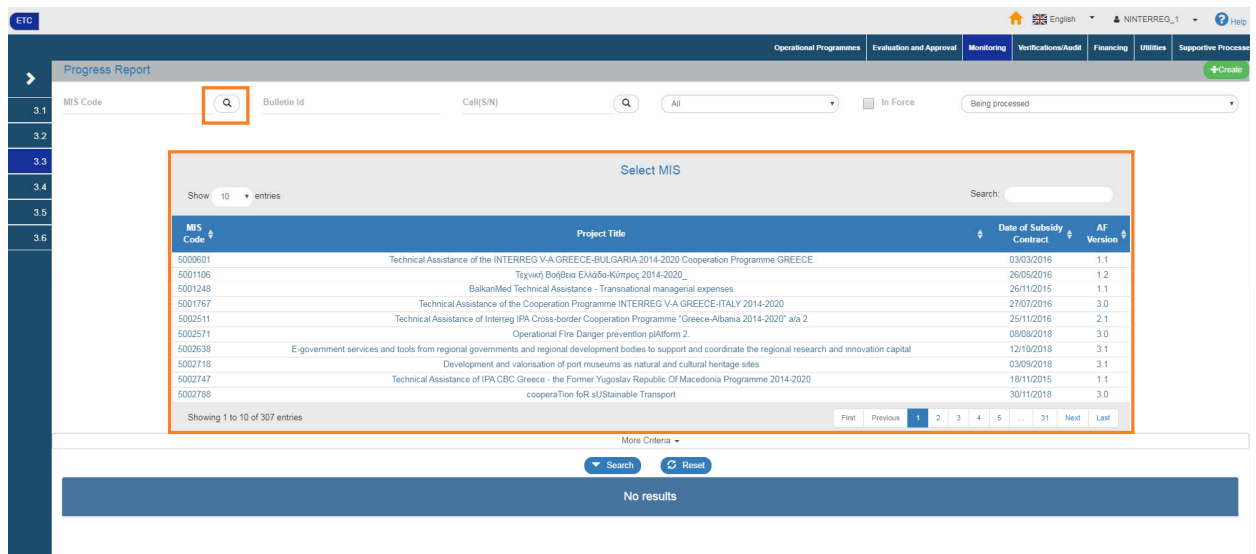
3. The search screen pops-up on the interface with the fields, as shown on the figure below.

4. The “main” search criteria are the following:

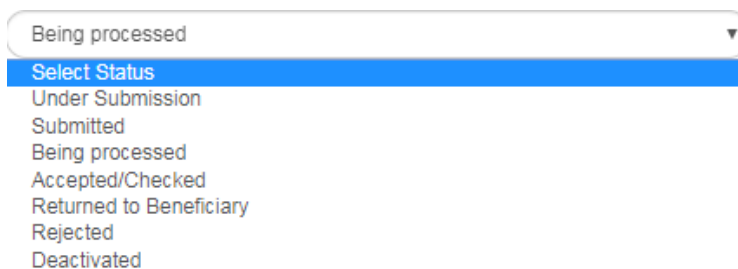
- Project Code (MIS): numeric field (list of values from lens search button)
- Report Id: numeric field
- Call S/N: numeric field (list of values from lens search button)

In the field “Project Code (MIS) and Call S/N”, the User has the possibility either to type the desired value or select the “lens search”  which allows him to search and select a value from the corresponding lists of values:

- Valid: Check box field



- Report Status: Pop-up list with the following values:



5. The “additional” search criteria appear by selecting “Additional Criteria” and are the following:

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ETC

Operational Programmes Evaluation and Approval Monitoring Verifications/Audit Financing Utilities Supportive Processes

Progress Report

MIS Code Bulletin Id Call(S/N All In Force Being processed

More Criteria

Project Title Beneficiary Bulletin S/N All years... Submitted by

Submission from Submission Due OP Search Reset

No results

- Project title: Numerical field
- Beneficiary: numeric field
- Report S/N: numeric field
- All years: Pop-up list with the following values:

All years...

All years...

2014

2015

2016

2017

2018

2019

2020

2021

2022

2023

- Submitter: numeric field
- Submission date from: Date field
- Submission date up to: Date field

6. The user makes the search.



Note: Section 2.3 of the “Application Interface” manual, presents the search screen operation which is common for all system functions.

7. After the search is completed, the results corresponding to the search criteria appear on the Table of Results:

ETC

Operational Programmes Evaluation and Approval Monitoring Verifications/Audit Financing Utilities Supportive Processes

Progress Report

MIS Code Bulletin Id 28056 Call(S/N All In Force Select Status

More Criteria

Select Columns Show 10 entries Search










Bulletin ID	MIS	Title	Bulletin SN	Year	Beneficiary	Submitted by	Submission Date	In Force	Status	Actions
28056	5002511	Technical Assistance of Interreg IPA Cross-border Cooperation Programme 'Greece-Albania 2014-2020'	1	2018	1100/104	ABROZOU	No	Under Submission		Select

Showing 1 to 1 of 1 entries

First Previous 1 Next Last

1.6 Progress Report Actions

The following table describes all the actions that appear on the pop-up list of the "Actions" column on the Table of Results of the search menu. Depending on the Progress Report status and the User's rights/competences.

ACTION	INTERPRETATION
 Edit	<p>The Edit action allows the user to recover the Progress Report in order to enter and edit data.</p> <p>After completing the Generate actions (New Progress Report, New Version or Copy) the title on the screen changes to Edit.</p>
 View	<p>The Review key allows the User to recover and view a Progress Report without the possibility of entering and/or editing its data.</p> <p>After performing the Submit, Discard, Cancel, Return, Finalize and Undo actions, the Progress Report status changes from Generate to Review.</p>
 Print ▾	It allows the User to Print in pdf or rtf format.
 Delete	<p>The Delete action deletes permanently a Progress Report from the system. After clicking on Delete, the User is taken to the screen search to search for a Progress Report. Deleting a Progress Report is only possible when it is in "Under Submission" status.</p>
 Cancellation	<p>The "Cancel" action does not delete the Progress Report from the system but its status changes to Invalid/Disabled and the User can recover it with Review.</p>
 Submit	<p>By clicking on the Report Submission (only for the Lead Beneficiary) the User submits the Progress Report to the Managing Authority/JS.</p>
 Return	<p>Through the Progress Report return action (only for the MA/JS), the Progress Report is returned from the MA/JS to the Lead Beneficiary.</p>
 Finalization	<p>Through the Finalization - Progress Report check (only for the Managing Authority/Intermediate Body), the User performs the final check and "locks" the Progress Report:</p>
 Uncheck	<p>Through the "Uncheck" action (only for the Managing Authority/Intermediate Body), it is possible to undo finalization (uncheck) in a Finalized Progress Report which changes status to "Being processed". Unchecking a Progress Report is only possible for Progress Reports that do not have any dependent on other Progress Reports.</p>