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Internal p-medicine website

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CO	Confidential, only for members of the consortium (including the Commission Services)	X



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¹ **R**=Report, **P**=Prototype, **D**=Demonstrator, **O**=Other

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1 Executive Summary

As part of the deliverable D17.1 “Internal and external p-medicine website”, this document describes the **password protected internal part of the p-medicine website** which serves as a management tool for the project. The tool has been set up to ensure smooth information and communication within the consortium, to organise meetings and keep track of publications and dissemination activities. In addition, it is designed to fulfil the requirements of the EC, e.g., regarding reporting to facilitate the preparation of reports. The features of the websites are not intended as an ultimate solution, but will instead be constantly revised, updated and modified to adapt it to the project consortium’s and the EC’s requirements.

2 Introduction

Purpose of this document

The deliverable D17.1.2 is part of the contractual deliverable D17.1 “Internal and external p-medicine website” and deals with the internal password-protected area of the p-medicine website. This internal area serves as a management tool for the implementation of the project and provides useful features to facilitate the general project management regarding communication, meeting organisation, reporting, overview of deliverables, publications and dissemination activities, etc.

The management tool is called *ProjectAngel* and this document contains the generally available manual for the use of the tool adapted to p-medicine. It provides precise descriptions of the features and detailed guidelines on how to work with the tool. The manual is uploaded in the tool as a reference and guidance for all partners involved in p-medicine.

ProjectAngel 7 – Communication & Management Platform



p-medicine

From data sharing and integration via VPH models to personalized medicine

FP7-ICT-2009-6 – Large-scale Integrating Project (IP)

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1. ProjectAngel 7.1.7

1.1. What is ProjectAngel? - Project management online

ProjectAngel is a web-based application that has been developed exclusively by progressima s.r.l. to facilitate the day-to-day tasks of project coordinators, work package leaders, team leaders and project partners during the entire life cycle of European research projects within European framework programmes.

ProjectAngel was first developed for FP6 projects, as an answer to a growing demand for innovative management solutions to help with the administration of particularly large projects, often with over thirty international participants from industry and academia. Since then ProjectAngel has steadily evolved in step with our growing experience in identifying and reacting to the specific needs of the project participants as well as the European Commission.

From the very beginning our goal has been to minimise your administration work in the management of your European research project, thus providing scientists and administrators with little or no European Framework Programme experience, access to a set of efficient management tools tailored specifically to European research projects.

Starting with the project proposal through the negotiation phase and on to the project implementation itself ProjectAngel provides project coordinators and their team members with clear structures that

- define and delineate project management procedures,
- actively enforce the collaboration between all project participants,
- create effective lines of communication and structured transparent workflow,
- clearly assign responsibilities and ensure that deadlines are met on time,
- integrate financial and work progress reporting facilities,
- monitor the work plan's progress and financial status.

ProjectAngel 7.1.7 is the latest version of our dynamic web-based project management tool. It is especially tailored to meet the needs of coordinators working in European funded RTD projects. progressima s.r.l. will provide full support throughout the p-medicine project life cycle. The content of the ProjectAngel platform consists of ten different modules listed in alphabetic order and described below.

1.2. Access rights and user groups

In ProjectAngel, access rights are determined by the affiliation to a user group or different user groups. A user group has a specific name and is defined by a set of actions that a user belonging to that user group is allowed to perform. A user may belong to multiple user groups in parallel, e.g. a user may be the member of a workspace, controller and reporter of their institution.

In principle, action control with user groups is very simple: User rights define different access levels that are authenticated via a login and password. This concept assigns users not only clear responsibilities and competences, but also defines the rights and duties of third parties. This way one can determine which group performs which task, which user obtains which access rights and which group occupies which role.

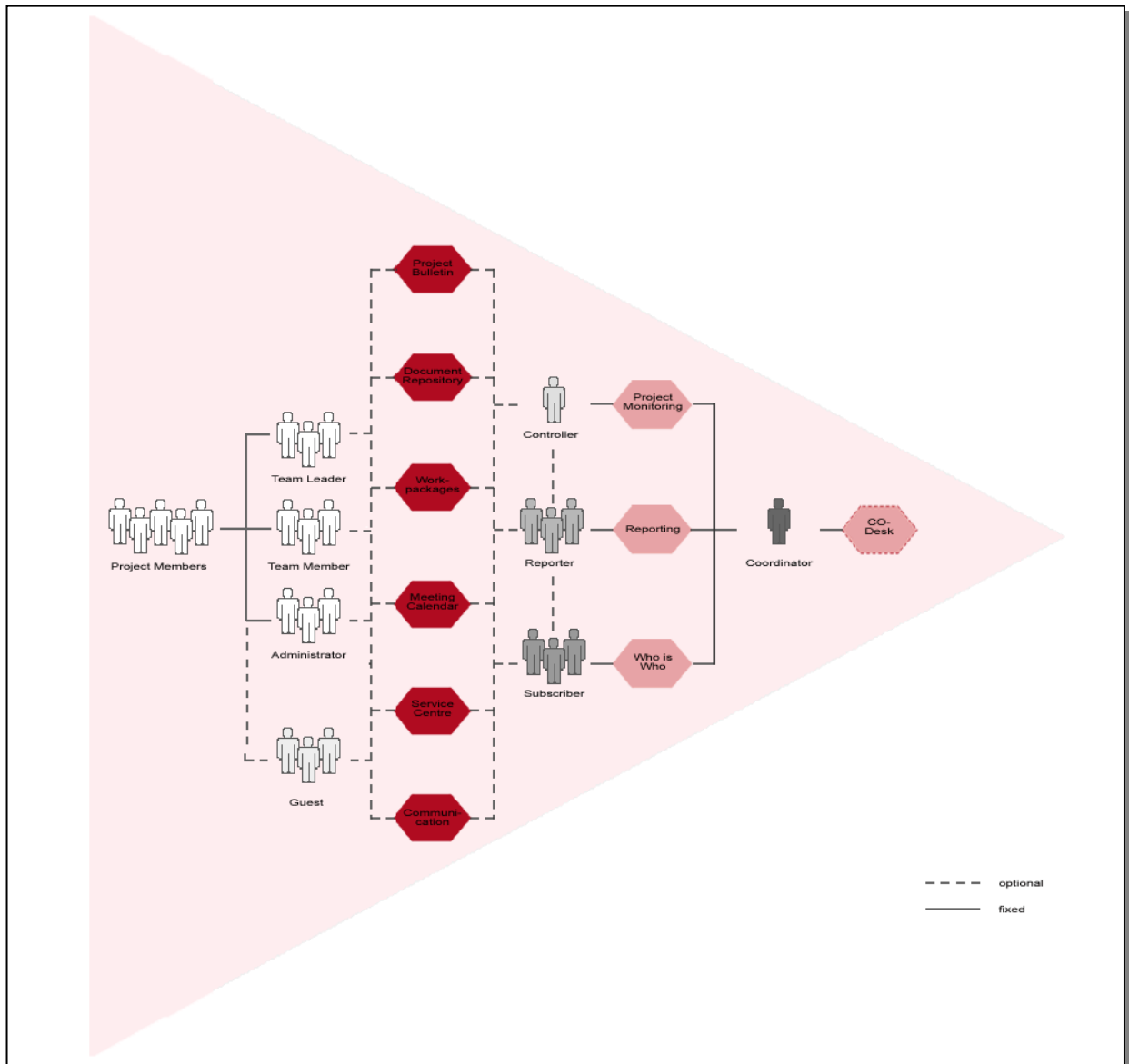


Figure 1 ProjectAngel – Access rights and user groups

ProjectAngel chooses an approach that only shows a user the allowed functions and contents defined by the user group he is assigned, so that the range of handling solutions for each user appears to be customised. By constraining the functions the user is assigned clear responsibilities, for he/she is only able to view contents relevant to his area of accountability. This improves the ease of handling the system. Information about users and their rights is respectively saved, while a back-end administration tool keeps it up-to-date and fills in the information gaps.

The information concerning the different user groups and access rights is displayed in the 'Coordination' module (see chapter 5, page 19).

2. Starting ProjectAngel

The screenshot shows the ProjectAngel web interface. At the top, there is a navigation bar with 'p-medicine', 'Public', 'ProjectAngel', and a question mark. On the right, there are 'Print' and 'Logout' links. A left sidebar contains a list of menu items: Communication, Coordination, Documents library, Meetings, Monitoring, Publications, Reporting, Service centre, Who is who, and Work plan. The main content area is divided into two main sections: 'p-medicine Message Board' and 'p-medicine Bulletin'.

Current status
 This is your current status:
 Username: lprojectangel
 [Logout]

Please click here

p-medicine Message Board

Thread	Thread Starter	Replies	Last Post
Welcome to the p-medicine message board! The message board is the perfect means to communicate and discuss project matters within the consortium.	ProjectAngel	0	9 days

Post new thread >>>

p-medicine Bulletin

Editorial office

Post News Entry 16.11.2010
Post an entry to the 'News Ticker'.
>>>

News ticker

Update: New 'Payments' feature for the coordinator (ProjectAngel 7.1.7) 07.07.2010
Helps keep track of the Community financial contribution and its distribution to the beneficiaries
>>>

Update: New 'Dissemination activities' feature in 'Publications' (ProjectAngel 7.1.6) 01.06.2010
Report all dissemination activities carried out in the context of the project for any given date
>>>

Document index

Annex V - Form B - Request for accession of a new beneficiary to the Grant agreement (Version 2, 01/12/2009) 22.11.2010
New document has been uploaded (category PM-Contracts).
>>>

Annex VI - Form C - financial statement for Collaborative Projects (Version 3, 01/12/2009) 22.11.2010
New document has been uploaded (category PM-Contracts).
>>>

Management info

16.11.2010
No news available yet.
>>>

Figure 2 Starting ProjectAngel

This entry page keeps the project members updated about all changes that occur in the ProjectAngel platform: combined with the 'Message board' and the 'Bulletin' module. The Bulletin – displayed as an internal news teaser – is divided into four categories:

- Editorial office
- News ticker
- Document index
- Management info (only visible to the coordinator and/or the project management team)

The last-mentioned acts as a separate bulletin specifically for the coordinator and/or the project management team which helps keep track of the reporting process and other management issues, by displaying a short notice when relevant documents (e.g. member reports, financial reports, web statistics, invoices, etc.) have been uploaded in the 'Reporting', 'eu

3. Monitoring

' and 'Coordination' modules. The notice includes the upload date and document title. The respective category is listed in parenthesis.

Furthermore, the recent thread posted into the 'Message board' module is displayed on top of the page. Each thread entails a discussion or conversation in the form of a series of member-written posts. These threads remain saved on the 'Message board' for future reading (see also chapter 4.3, p. 17). Entering in ProjectAngel each user can get a quick overview of the recent activities in the project.

4. Communication

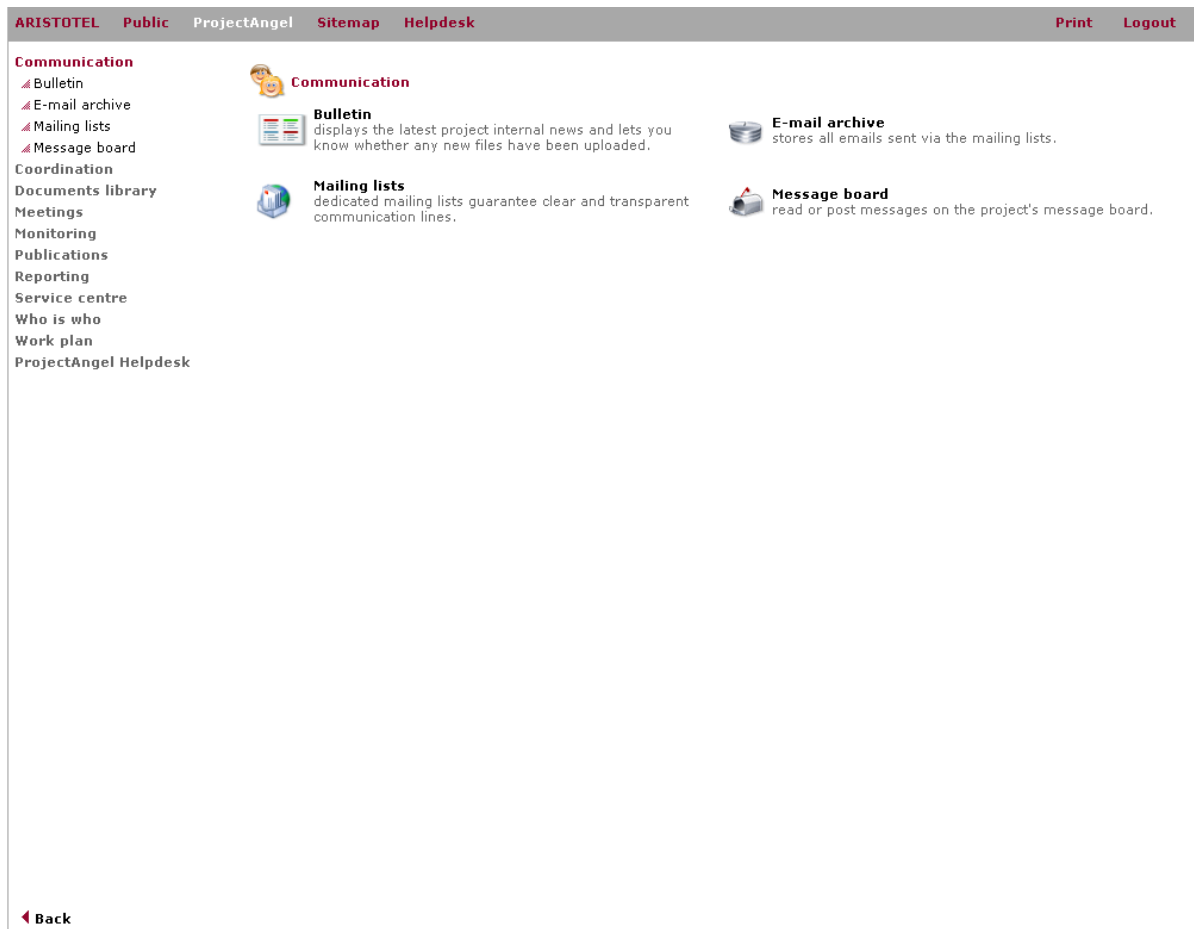


Figure 3 Communication/Overview

The ambitious objectives and the complex structure of European projects require particular attention of the consortium to communicate project-related issues. Both scientific and administrative project activities are complementary; they are closely linked and integrated with one another, making project communication essential. The basic idea of the 'Communication' module is to relieve researchers from administrative matters, thereby allowing them to focus more on RTD activities. ProjectAngel is adapted to the specifics of European projects and provides the necessary support for day-to-day tasks. Summing up it improves the project's communication effectiveness. Therefore, the 'Communication' module is organised in four sub modules that will be described in the following.

4.1. Bulletin

4.1.1. Editorial office

On the one hand, this section displays the project core information and on the other hand, it offers a platform where all members can post news entries that they would like to have displayed in the 'p-medicine Bulletin/News Ticker' (see chapter 4.1.2, p. 15).

4.1.1.1. Fact Sheet

The 'Fact Sheet' will be displayed in the 'p-medicine Bulletin/Editorial office' throughout the whole project duration. Based on the EC fact sheets – published via the EU web services (<http://cordis.europa.eu/>) – this feature lists the

basic information concerning your European project, i.e. the project title, the action line, the coordinator's contact data the project reference number, the start and end dates, the total project duration, project costs, contract type and funding as well as a list of all project participants and a short project summary.

4.1.1.2. Post news entry

To post a news entry in the 'p-medicine Bulletin/News ticker' and inform the consortium about any event, research activity, etc. that may be of interest to the other project members or is relevant to the scientific work, the members can use this new feature.

Users have to fill out an online form, providing all necessary details such as the news title (max 40 characters), subtitle (max 80 characters), author, date (dd.mm.yyyy) they wish to have the news published, hyperlink/URL leading to further information about the news entry, and finally the actual news text. Additionally a time limit for each individual news entry could be set up i.e. users can define a time period in which their news entry will be displayed, when it expires the news entry will automatically be deactivated.

4.1.2. News ticker

The 'News ticker' displays all project related information, as e.g. upcoming deadlines, availability of new features, workshops and conferences on common research interests of the project, project internal news such as consortium partners who have received national or international awards, presentation of new team members etc.. All news posted by the project partners themselves (as described in chapter 4.1.1.2) can be viewed here.

4.1.3. Document index

This feature allows all partners to keep track of documents that have been edited or updated/deleted by displaying a short notice in the news teaser - an important tool for controlling documents and being aware of your project's work progress.

4.1.4. Management info

Very similar to the 'Document index', the 'Management info'-feature shows the project coordinator and/or the members of the Project Management Team the confidential documents that have been edited or updated/deleted by displaying a short notice in this separate news teaser.

4.1.5. E-mail archive

Communication

- ▲ Bulletin
- ▼ **E-mail archive**
- ▲ Mailing lists
- ▲ Message board

Coordination

Documents library

Meetings

Monitoring

Publications

Reporting

Service centre

Who is who

Work plan

Name	E-Mail	Mails
1.01 - all@p-medicine.eu	all@p-medicine.eu	0
1.02 - teamleaders@p-medicine.eu	teamleaders@p-medicine.eu	0
1.04 - reporting@p-medicine.eu	reporting@p-medicine.eu	0
1.05 - management@p-medicine.eu	management@p-medicine.eu	0
1.06 - wpleaders@p-medicine.eu	wpleaders@p-medicine.eu	0
2.01 - doc-tracking@p-medicine.eu	doc-tracking@p-medicine.eu	0
2.02 - message@p-medicine.eu	message@p-medicine.eu	0
3.00 - creative-team@p-medicine.eu	creative-team@p-medicine.eu	2
publications-veto@p-medicine.eu	publications-veto@p-medicine.eu	0

◀ Back

Figure 4 E-mail archive

In the 'E-mail archive' an overview of all available project mailing lists is displayed listing the names, e-mail addresses, and number of e-mails that have been sent via a mailing list.

In a subordinated webpage the user has access to all e-mails distributed via the respective mailing account (arranged in chronological order). This overview contains all specifications concerning the subject, the authors' e-mail address and the submission date. Furthermore, a 'paper clip icon' informs the user about file attachments. Each subordinated webpage lists twenty entries. Beyond that e-mails will be listed on additional web pages, which can be navigated by a horizontal bar. A 'Back' button – on the top as well as at the end of each page – allows the user to return easily to the overview page.

4.2. Mailing lists

Here partners can look up the various mailing lists and the respective addressees that have been set-up for the project communication. Users can send an e-mail to the mailing list by clicking on its title. It is directly linked to their personal e-mail processing programme (e.g. MS-Outlook). For convenience, the corresponding e-mail address will automatically appear in the recipient heading. Currently existing mailing lists are listed¹ as follows:


¹ Status after the initial set-up

p-medicine Public ProjectAngel Sitemap ? Print Logout

Communication

- ▲ Bulletin
- ▲ E-mail archive
- ▲ **Mailing lists**
 - ▲ Mailing list subscription
- ▲ Message board

Coordination
Documents library
Meetings
Monitoring
Publications
Reporting
Service centre
Who is who
Work plan

 **Mailing lists**

When certain types of documents are uploaded to ProjectAngel persons listed in the 'doc-tracking' mailing list will be notified. If you do not wish to receive such a notice you can unsubscribe yourself from said list.
To find out if new documents have been posted, you can also check the 'Document Index' in the news bulletin. In some cases, depending on the type of document, you may automatically receive an email notice, regardless of whether you are listed in the 'doc tracking' mailing list or not.

Change your subscription status ▶

1.01 - all@p-medicine.eu - All project members
Norbert Graf, Corinna Hahn, Janine Hintz, Meike Reimann

1.02 - teamleaders@p-medicine.eu - Authorised representatives of each beneficiary
Norbert Graf, Corinna Hahn, Janine Hintz, Meike Reimann

1.03 - financials@p-medicine.eu - Persons in charge of administrative and financial aspects
Corinna Hahn, Janine Hintz, Meike Reimann

1.04 - reporting@p-medicine.eu - Persons in charge of contributing to the periodic reports
Pascal Fichot, Norbert Graf, Corinna Hahn, Janine Hintz, Meike Reimann

1.05 - management@p-medicine.eu - All project members
Norbert Graf, Corinna Hahn, Janine Hintz, Meike Reimann

1.06 - wpleaders@p-medicine.eu - Work package leaders and their deputies
Norbert Graf

2.01 - doc-tracking@p-medicine.eu - Persons subscribed to the 'Document tracking' E-mail alert
Norbert Graf, Corinna Hahn, Janine Hintz, Meike Reimann

2.02 - message@p-medicine.eu - Persons subscribed to the 'Message Board' E-mail alert
Norbert Graf, Corinna Hahn, Janine Hintz, Meike Reimann

3.00 - creative-team@p-medicine.eu - Persons in charge of the CI development
Astrid Gindorf-Scherer, Norbert Graf, Meike Reimann, Nina Weiler

◀ Back

Figure 5 Mailing lists

4.2.1. Mailing list subscription

Partners can subscribe or unsubscribe from the existing mailing lists by clicking 'Change your subscription status' at the top of the page. In a new window an interface will display their subscription status concerning all mailing lists. To 'subscribe' or 'unsubscribe' the user should click the respective button. The user's e-mail address will automatically be added to/removed from a mailing list.

4.3. Message board

The 'Message board' – commonly known as discussion board, (electronic) discussion group, discussion forum, bulletin board – is a facility for having professional discussions and posting member-written threads. The 'Message board' may refer to the entire project community, or a specific forum within the project depending on the access levels defined by the project coordinator.

Each thread entails a discussion or conversation in the form of a series of member-written posts. These threads remain saved on the 'Message board' for future reading indefinitely or until deletion by the project coordinator. The different project members can read threads, reply to existing threads, and start new threads as they wish. The 'Message board', however, does not allow people to edit other's messages. Each thread is attributed to a registered username. Threads are either flat (posts are listed in chronological order) or threaded (each post is made in reply to a parent post).

p-medicine Public ProjectAngel ? Print Logout

Communication

- ▲ Bulletin
- ▲ E-mail archive
- ▲ Mailing lists
- ▼ **Message board**
- Coordination
- Documents library
- Meetings
- Monitoring
- Publications
- Reporting
- Service centre
- Who is who
- Work plan

Message board

Thread title:

Message:

Your name:

Your email:

Notify me about reply:

All threads

Searching:

Thread	Thread Starter	Replies	Last Post
Welcome to the p-medicine message board! <small>The message board is the perfect means to communicate and discuss project matters within the consortium.</small>	ProjectAngel	0	9 days

[◀ Back](#)

Figure 6 Message board

The project members are the backbone of the 'Message board', posting and responding to each other's messages. One significant difference between the 'Message board' and the 'Mailing lists' is that the latter automatically delivers new messages to the subscriber, while the former requires that the project members visit the p-medicine intranet, and check for new posts. Due to the possibility of members missing replies to threads they are interested in, the 'Message board' includes an 'e-mail notification'-feature that automatically sends a message to all project members subscribed to the 'message@p-medicine.eu'-mailing list, informing them that a new thread has been posted.

5. Coordination

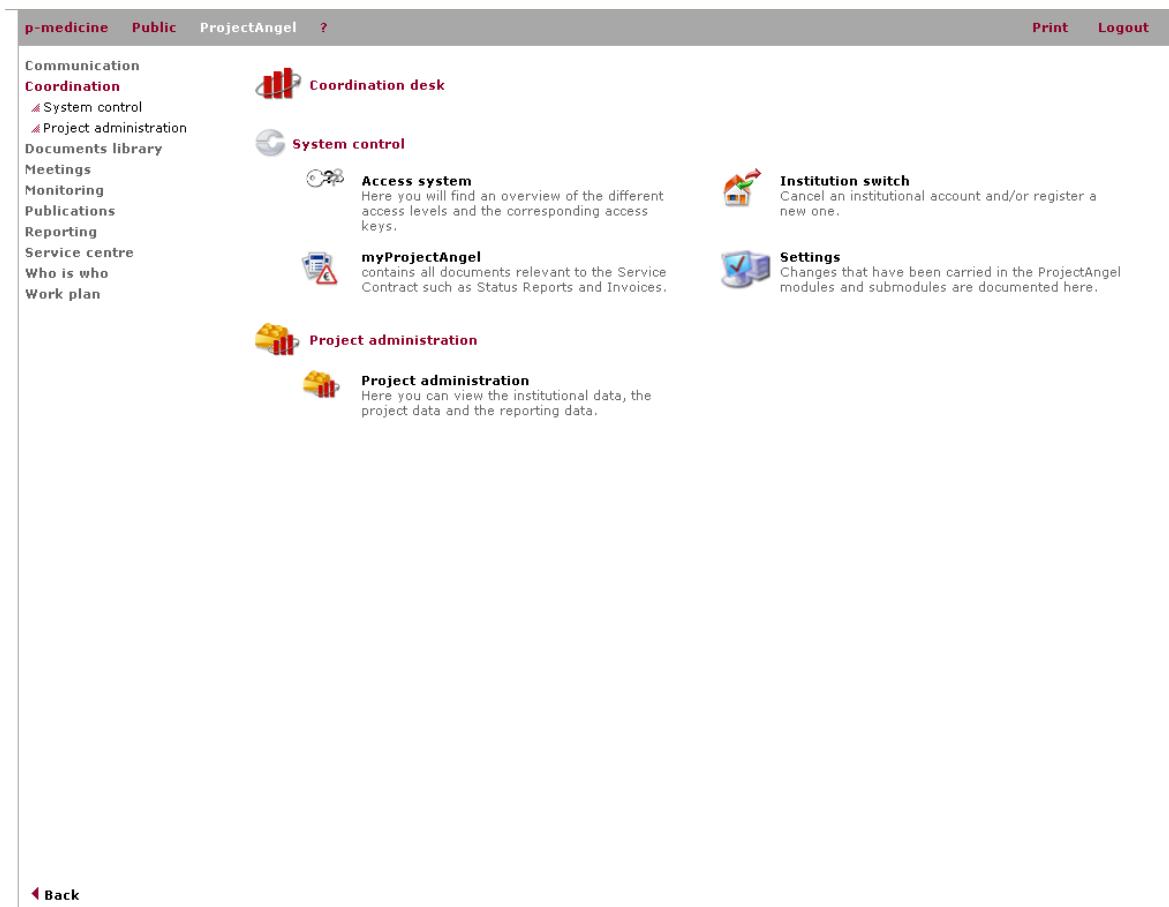


Figure 7 Coordination desk/Overview

The features presented in the 'Coordination' module are reserved solely for the project coordinator. They are intended to facilitate their work with ProjectAngel as well as assist them in monitoring the project tasks and day-to-day administration.

5.1. System control

5.1.1. Access system

Here the coordinator can find out who has access to what module and sub module via an overview of the different access levels and corresponding access keys. Each key entails different access rights which in turn correspond to specific access levels. These are structured hierarchically so that a higher ranking access level will always include the access rights of the one below. Each user is assigned one or more access keys with which he can access the various modules and sub modules of ProjectAngel.

The following schedule displays the users highest access key neglecting the keys ranked below.

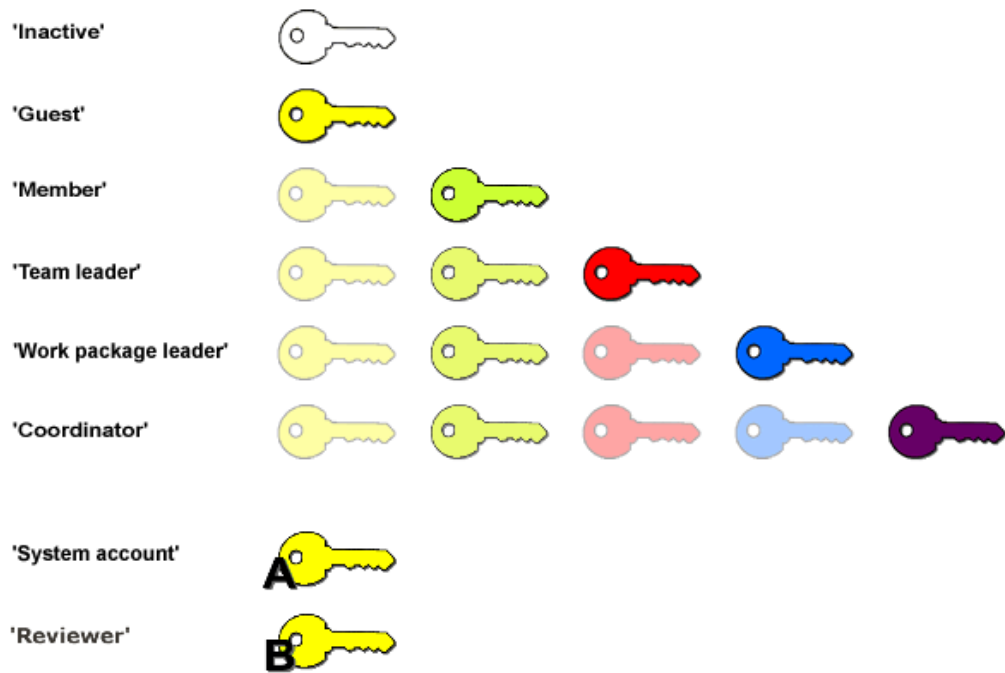


Figure 8 Access keys

5.1.1.1. Guest

Is the lowest ranking access key intended for selected user groups which have been invited by a team leader and/or the project coordinator to access certain modules and sub modules of ProjectAngel, that do not contain any project-confidential information.

5.1.1.2. Member

The Members Area of the p-medicine project i.e. ProjectAngel is accessible via a username and a password specific to each registered user. All members have access to the common modules: Communication, Documents library, ProjectAngel Helpdesk, Meetings, Service centre, Who is who, Work plan, and Sitemap.

5.1.1.3. Team leader

Unless otherwise indicated, the team leader, team leader deputy and designated (financial) administrators will have access to the 'eu

6. Monitoring

' module where all important financial information on the project in general and the different institutions in particular are stored. To keep the (institutional) confidential data private, only the coordinator has access to all financial information.

In addition, users with this key will also have access to the 'Reporting' module where all scientific information on their institution and the different work packages are stored. The 'Reporting' module is set up as a hierarchical system reflecting the different positions of the project partners in the institutional line of organisation as well as according to the project structure: Team member², team leader³, financial administrator⁴ or work package leader⁵. These positions carry different responsibilities that also extend to the reporting process.

The section 'Work progress and achievements during the period (TL)' concerns the project work carried out on institutional level and has to be completed by each team leader or a designated responsible. Here team leaders have to provide input concerning the scientific progress (work progress description and dissemination activities). Furthermore they are obliged to contribute to the 'Explanation of the use of the resources' and the 'Financial Statement' (see also Annex I and Annex III, p. 94ff).

6.1.1.1. Work package leader

The section 'Work progress and achievements during the period (WPL)' concerns the project work carried out in the different work packages and has to be completed by each work package leader or a designated responsible. Here work package leaders have to provide input to the work progress description, the deliverables and milestones lists (see also Annex II, p. 98ff).

6.1.1.2. Coordinator

The 'Coordinator' key is the highest ranking access key. It is only given to the project coordinator and their project management team (if requested), since it enables him/her to view all modules and all project information. They have access to project sensitive data and are allowed to upload and edit certain documents. Access to the 'Coordination' module is reserved for members of this user group only.

By clicking on an access key the project coordinator can find out the names of the users who are assigned to the key in question, as well as the pages that can be accessed with the key. In an overview page all ProjectAngel modules are listed together with the corresponding access key.

² **Team members (TM)** are scientific staff at the partner institutions involved in the research work specified in the Description of Work (Annex I). They execute the tasks assigned to them by their respective TLs to whom they also report.

³ **Team leaders (TL)** represent an institution's spokesperson. They are the interface between the members of a working team within a partner institution and the project consortium.

⁴ **Financial administrator (FA)** includes non-scientific personnel involved in handling contractual, financial and organisational matters related to the project execution.

⁵ **Work package leaders (WPL)** are responsible for the co-ordination of the activities of all partners involved in their work package. They are the interface between the partners of their respective work packages and the co-ordinator.

6.1.2. Institution switch

p-medicine Public ProjectAngel ? Print Logout

Communication
Coordination
 System control
 Access system
Institution switch
 myProjectAngel
 Settings
 Project administration
 Documents library
 Meetings
 Monitoring
 Publications
 Reporting
 Service centre
 Who is who
 Work plan

Institution switch

New participating institution(s)

All fields marked with * must be filled in. If certain information cannot be provided please type 'to be defined / tbd' or 'not available / n.a.'.

1. Institution data

Institution acronym:

Institution name:

Institution number (according to form A2):

Team leader

Last name:

First name:

Email address:

2. Institution data

Institution acronym:

Institution name:

Institution number (according to form A2):

Team leader

Last name:

First name:

Email address:

3. Institution data

Institution acronym:

Institution name:

Institution number (according to form A2):

Team leader

Last name:

First name:

Email address:

[Back](#)

Figure 9 Institution switch

Partner institutions that are currently part of the project may be leaving the consortium in the future and be substituted by others. In this case the coordinator must notify ProjectAngel via the online form that can be found here. It allows the coordinator to remove all institution-specific data as well as the institution member's accounts, whereby access to any documents uploaded by the existing institution's members shall remain available to them unless otherwise defined - while at the same time registering the new institution together with its corresponding team leader, team leader deputy, and financial administrator.

6.1.3. myProjectAngel

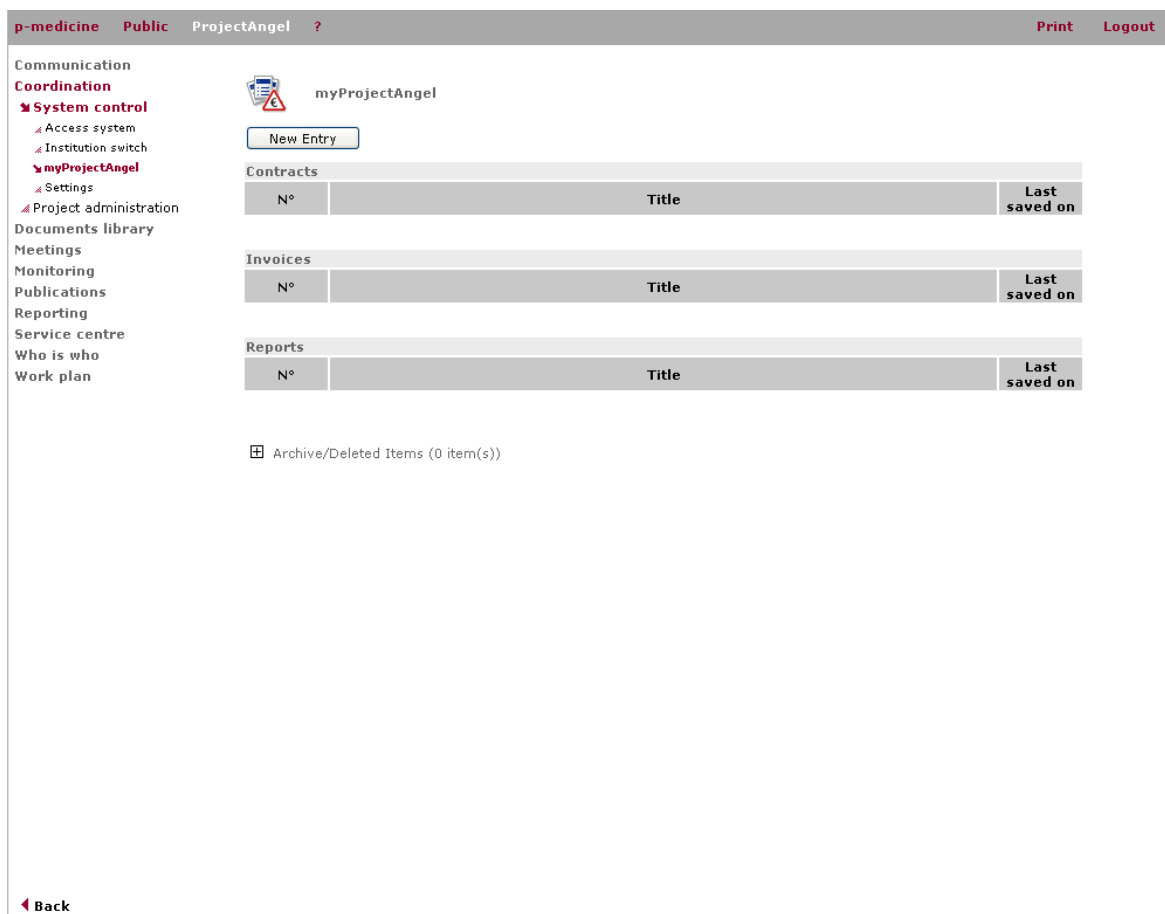


Figure 10 myprojectAngel

All data relating to the Service Contract is stored in 'myProjectAngel'. The contract itself, including all annexes and amendments, periodic invoices and progress status reports can be viewed and/or downloaded here.

6.1.4. Settings

The documentation of changes of the basic platform settings that have been carried out during the project life-cycle are stored in this directory.

6.2. Project administration

From the start during the proposal phase, the user, in particular the project coordinator electronically submits the necessary data for the setup and configuration of the ProjectAngel/'Proposal Writer' and/or 'Negotiation Coach' platforms. This information together with the data used in the previous platforms, later enables a full customised installation of 'ProjectAngel'. The user is required to provide only the data that is essential for the setup of the platform(s). All other information relating to the project/proposal can be entered by the user at a later time.

Since all proposals must be submitted using the FP7 'Electronic Proposal Submission Service (EPPS)', the entry forms and all terms used in ProjectAngel are based on the official terminology used by the European Commission. A clear example of this can be seen in the titles of the 'Project administration' tabs (A2.1, A2.2, etc.). Here the user enters the same information that is required from the EPPS. This ensures a clear, uniform

and user-friendly approach. Once the data has been entered and saved in the system, it is available to the consortium for further reference and editing. As mentioned already, ProjectAngel also uses this information for the setup of the platform(s) and displays relevant data in certain modules to avoid having to enter information more than once.

The 'Project administration' module is divided into three parts:

- Institution data
- Project data
- Reporting data

These in turn are broken down into sub-categories, which are displayed in a tab structure. Here the user mainly enters the information from the Proposal Submission Forms (PSF) or Grant Agreement Preparation Forms (GPF). In which case the information partly covers administrative and legal issues, that can only be entered by the project coordinator or the person legally authorised by each partner institution.

During the initial setup of the ProjectAngel platform all this information will be filled in by progressima. The coordinator, however, has to check this information for completeness and correctness as it affects the functionalities of all ProjectAngel modules.

6.2.1. Institution data

Participant N°	Participant short name	Participant legal name	Team leader	If 3rd party, linked to participant	
01	USAAR	Universitaet des Saarlandes	Graf Norbert		
02	EURICE	European Research and Project Office GmbH	Scherer Joerg		
03	FORTH	Foundation for Research and Technology – Hellas	Tsilnakis Manolis		
04	UCL	University College London	Coveney Peter		
05	FhG	Fraunhofer Gesellschaft	Kiefer Stephan		
06	LUH	Leibniz University Hannover	Forgó Nikolaus		
07	CUSTODIX	Custodix			
08	Philips	Philips Research	Bucur Anca		
09	UDUS	Heinrich-Heine-Universität Düsseldorf	Ohmann Christian		
10	ICCS	Institute of Communication and Computer Systems			
11	UPM	Universidad Politecnica de Madrid	Majojo Víctor		
12	CAU	Christian Albrecht Universität zu Kiel			
13	IEO	Istituto Europeo di Oncologia			
14	ecancer	ecancermedalscience	McVie Gordon		
15	UOXF	University of Oxford			
16	BIOVISTA	Biovista			
17	SIB	Swiss Institute of Bioinformatics			
18	UHok	Hokkaido University	Tanaka Yuzuru		
19	IBM Israel	IBM Israel - Science and	Naor Dalit		

Figure 11 Institution data/A2.1

This section contains all information concerning the participating institutions' basic legal data (address, registration number, etc.), legal status, contact information on all authorised representatives (legal, financial, scientific), and financial data (cost model, bank information). All data is categorised according to the European Commission's official forms: A2.1, A2.2, A2.3, A2.4, A3.1, and A4.

Before completing this data the user/project coordinator should first check the participating institutions in the tab marked 'Institutions' to see if they are listed completely and numbered correctly, and assign the person who will be in charge of supervising the institution's use of ProjectAngel (Team leader). Generally, this person is the person in charge of the institution's scientific work in the project.

6.2.2. Project data

This section displays the main project data. Like 'Institution data' it is categorised according to the European Commission's official forms: A1 and A3.2. The former represents the project's factsheet (name, acronym, number, abstract, etc.), the latter an overview of the project costs.

The screenshot shows the 'Project data' form in ProjectAngel, specifically the 'A1 Basic Data/Factsheet' tab. The form is divided into several sections:

- Navigation:** Tabs for A1, A3.2, Payments, and Coordinating institution.
- Instructions:** Two sections labeled 'Instructions - how?' and 'Instructions - what?' with expandable arrows.
- Form Fields:**
 - Project number: 270089
 - Project acronym: p-medicine
 - Project title: From data sharing and integration via VPH
 - Starting date: 01.11.2010
 - End date: 31.01.2015
 - Duration in months: 48
 - Call (part) identifier: FP7-ICT-2009-6
 - Activity code(s) most relevant to your topic: (empty)
 - Free keywords: Personalized medicine, VPH, in silico oncology, Supercomputing, Ontologies, Data Security, Privacy
 - Project website: http://www.p-medicine.eu
 - Project logo: - No file(s) specified -
 - Funding instrument: Collaborative projects
- Abstract:** A rich text editor with a toolbar and a text area containing the following text:

Medicine is undergoing a revolution that is transforming the nature of healthcare from reactive to preventive. The changes are catalyzed by a new systems approach to disease which focuses on integrated diagnosis, treatment and prevention of disease in individuals. This will replace our current mode of medicine over the coming years with a personalized predictive treatment. While the goal is clear, the path is fraught with challenges. P-medicine brings together international leaders in their fields to create an infrastructure that will facilitate this translation from current practice to personalized medicine. In achieving this objective p-medicine has formulated a coherent, integrated workplan for the design, development, integration and validation of technologically challenging areas of today. Our emphasis is on formulating an open, modular framework of tools and services, so that p-medicine can be adopted gradually, including efficient secure sharing and handling of large personalized data sets, enabling demanding Virtual Physiological Human (VPH) multiscale simulations (in silico oncology), building standards-compliant tools and models for VPH research, drawing on the VPH Toolkit and providing tools for large-scale, privacy-preserving data and literature mining, a key component of VPH research. We will ensure that privacy, non-discrimination, and access policies are aligned to maximize protection of and benefit to patients. The
- Buttons:** 'Save' button at the bottom right of the abstract field.
- Navigation:** 'Back' button at the bottom left.

Figure 12 Project data/A1

6.2.2.1. A1

The entries shown here should correspond with the data from A1. The start and end dates as well as the project duration and type of funding instrument are important data that is used throughout ProjectAngel for example in 'Publications' and 'Reporting'. Any changes made to this information may therefore affect different parts of ProjectAngel.

6.2.2.2. A3.2

The information shown here is based on the entries made in A3.1 ('Institution data'), and provides an overview of the project costs for every institution. Contrary to the requirements of the European Commission regarding A3.2, this form also includes the costs (if available) for any corresponding sub-institution(s) so that the coordinator as well as the beneficiaries can have a precise picture concerning the distribution of project costs. This information is solely for project internal monitoring purposes and is not reflected in the official financial statement.

6.2.2.3. Payments

According to the EC Grant Agreement (Annex II.2.3) the coordinator is in charge of administering the Community financial contribution and allocating the corresponding amounts to the beneficiaries. Furthermore, the coordinator should be able to determine at any time what portion of the contribution has been paid to each beneficiary for the purposes of the project, as well as provide the European Commission on a regular basis or on demand with information on the distribution of the Community financial contribution including the date of transfers to the beneficiaries.

Beneficiary number	Beneficiary short name	Maximum EC contribution	% of maximum EC contribution	Date of payment to the beneficiaries	Amount in Euro	Remaining EC contribution
01	USAAR	1,446,160.00	10.85			1,446,160.00
02	EURICE	653,138.00	4.90			653,138.00
03	FORTH	967,674.00	7.26			967,674.00
04	UCL	1,051,323.00	7.89			1,051,323.00
05	FhG	1,530,712.00	11.48			1,530,712.00
06	LUH	582,851.00	4.37			582,851.00
07	CUSTODIX	607,075.00	4.55			607,075.00
08	Philips	887,920.00	6.66			887,920.00
09	UDUS	526,311.00	3.95			526,311.00
10	ICCS	674,200.00	5.06			674,200.00
11	UPM	506,790.00	3.80			506,790.00
12	CAU	340,000.00	2.55			340,000.00
13	IEO	430,118.00	3.23			430,118.00
14	ecancer	858,480.00	6.44			858,480.00
15	UOXF	574,380.00	4.31			574,380.00
16	BIOVISTA	393,001.00	2.95			393,001.00

Figure 13 Project data/Payments

'Payments' helps ensure that all the appropriate payments are made to the other beneficiaries without unjustified delay and keeps track of the Community financial contribution and its distribution. This way the coordinator can record all payment transfers, and via the 'Print version' feature create an .xls-file that allows him/her to have the relevant information on hand when requested by the European Commission. The exported table displays the payment information for the entire project (not only for the undergoing reporting period), so that it can also be used for the management/financial part of the next periodic report. Although the European Commission does not expressly stipulates such a table as part of the periodic report, this information can be provided to fulfill the

above-mentioned EC requirements and make the payment transfers transparently available as part of the explanation of the use of the resources (see chapter 12.1.6, p. 60).

In line with the payment modalities of the European Commission, 'Payments' differs between the first pre-financing payment and the later interim payments. In the first case ProjectAngel calculates the allocation between the beneficiaries based on the percentage rate of the individual maximum EC contribution, whereby the numbers listed in the column 'Max EC contribution' are based on those given in form A3.2. The coordinator can then adjust the amounts based on what was actually transferred to the beneficiaries.

After the approval of the periodic reports, interim payments are made by the European Commission calculated on the basis of the accepted eligible costs and the corresponding reimbursement rates (Guide to Financial Issues, Article II.6.1.b). In this case the coordinator enters the total amount of the interim payment and then, based on the costs accepted by the European Commission and any other criteria stipulated in the grant agreement as well as relevant decisions taken by the consortium, he/she fills in the individual amounts and the dates these were transferred to the other beneficiaries.

6.2.2.4. Coordinating institution

This form designates the coordinating institution. The information is based on the entries made for the corresponding institution in A2.1 ('Institution data').

6.2.3. Reporting data

This section is relevant for the periodic reporting. In contrast to the other sections it is not based on any official forms, and is not reflected in the EPSS. The data collected here is used for the setup of the 'Reporting' module, and is mainly intended for the coordinator to have an overview of the 'Reporting'-key data.

6.2.3.1. Reporting periods

This table lists the project's reporting periods which are relevant for 'Reporting'. If the project's documentation includes interim reports, in addition to the mandatory periodic progress reports, the respective ongoing interim reporting period will be displayed. Once the interim report has been completed, the upcoming deadline for the mandatory progress report will be listed instead. The data that has been collected for the interim report is automatically integrated into the upcoming mandatory periodic progress report, where it can be edited and/or updated.

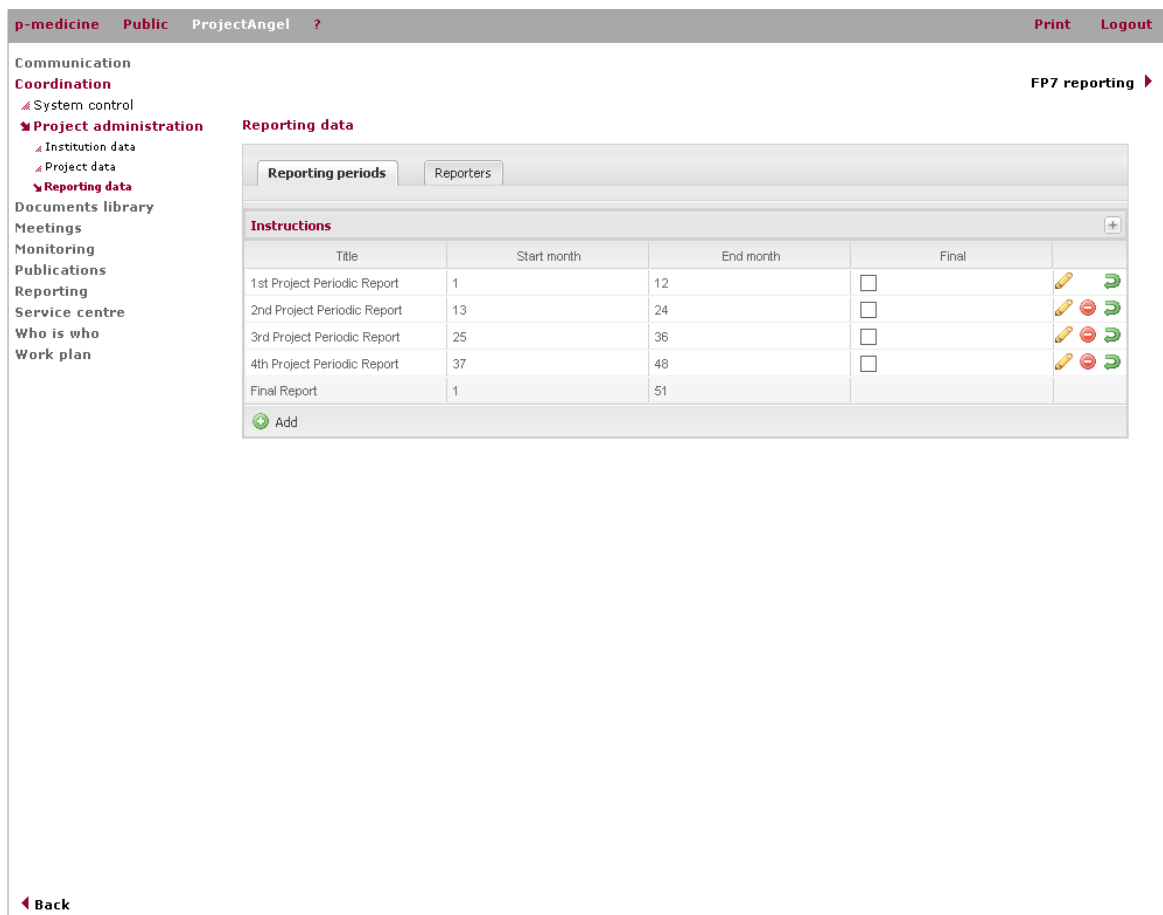


Figure 14 Reporting data/Reporting periods

6.2.3.2. Reporters

Depending on the role a user has been assigned he/she will only be able to access the 'Reporting' sections that are relevant to them. This feature allows the coordinator to see who can report what for their institution, and also determine a team member's access to 'Reporting'. Depending on the role assigned to them, they will be able to see the following 'Reporting' sections:

TL-Reporter	Work progress TL	Explanation of the use of the resources	Financial statement	-	-
Financial-Reporter	-	Explanation of the use of the resources	Financial statement	-	-
WPL-Reporter	-	-	-	Work progress WPL	-
CO-Reporter	Work progress TL	Explanation of the use of the resources	Financial statement	Work progress WPL	Project management

If a person's name is not listed, then further team members can be registered in 'Who is who' (see chapter 14.3, p. 78). A person's name may not appear in this table, however, if they have not activated their account i.e. an invited person who has not logged in yet (for more information see chapter 5.1.1 Access system, p. 19).

7. Documents library

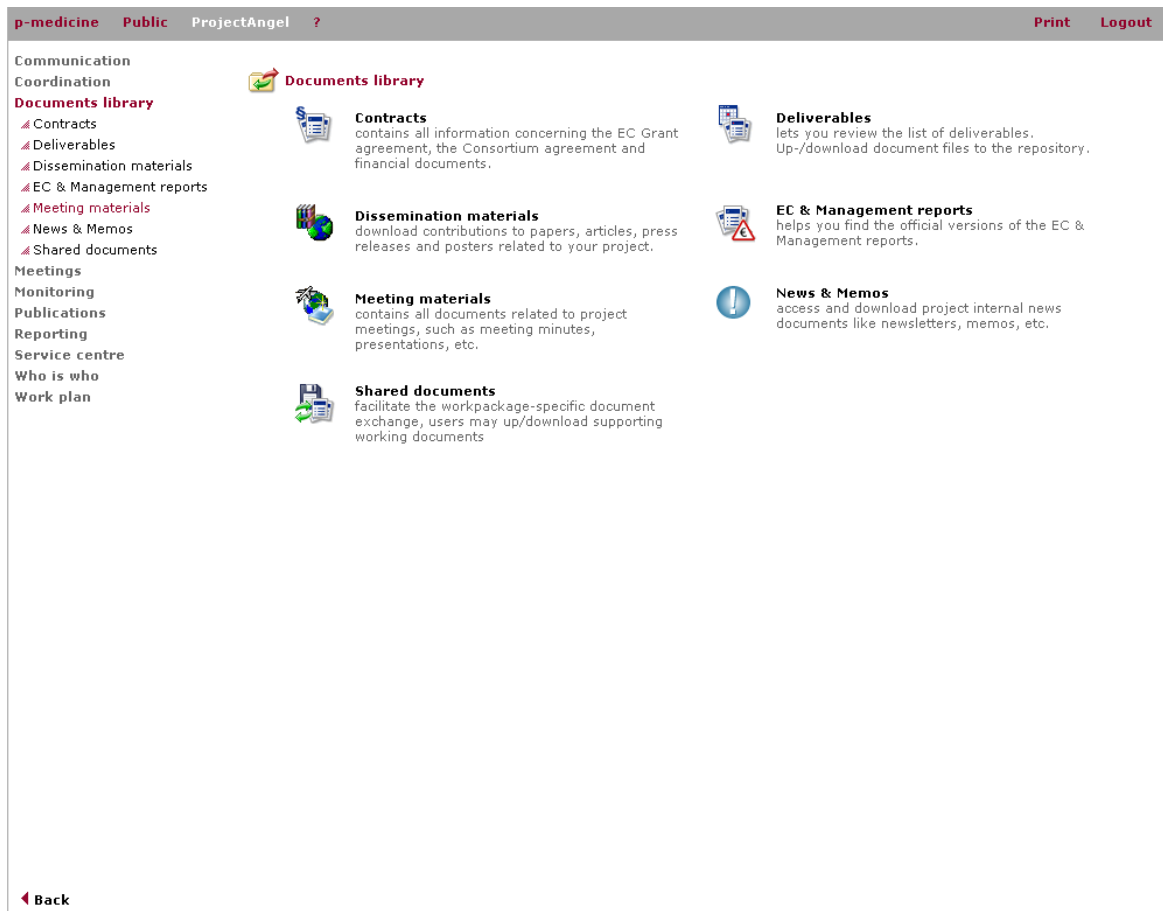


Figure 15 Documents library/Overview

To make sure that partners are always working on the latest version of a document and to prevent modifications of finalised and submitted documents, the 'Documents library' contains all project documents (reports, contracts, deliverables, etc.) that have been produced by the project consortium during the project life-cycle. Certain document categories cannot be modified in any manner, thus ensuring their reference character and enabling project partners' access to reliable finalised document versions. There is no upload function available here for the project partners.

7.1. Functionalities

The tables of the different document categories provide detailed information about the following features:

7.1.1. Status

Documents can be marked according to the status classification system mentioned below. The status of the deliverables varies during the project life-span and must therefore be constantly updated. By clicking on the question mark icon, a new window will open and display the detailed annotations:

- **Planned:** The document is foreseen in the project work plan and will be issued in the future according to the schedule.

- **Issued:** The document has been issued within the consortium and will undergo review.
- **Submitted:** The document has been submitted to the European Commission.
- **Accepted:** The European Commission has acknowledged and approved the document.
- **Rejected:** The European Commission has (currently) not approved and therefore rejected the document.

7.1.2. Title

All deliverables bear titles according to the EC Grant Agreement, Annex I in order to enable the user to quickly identify the document and efficiently retrieve the needed information.

7.1.3. Type

Documents usually fall into the two major document types, 'reports' and 'prototypes'. But they may also be classified into the categories 'demonstration' or 'other'.

7.1.4. Leading beneficiary

All deliverables bear the name of the project partner responsible for deliverable submission as identified by the EC Grant Agreement, Annex I.

7.1.5. Security

Security indicates the dissemination level defined by the EC Grant Agreement. By clicking on the question mark icon, a new window will pop up and display the detailed annotations to the following abbreviations:

PU: public

PP: restricted to other programme participants (including the Commission Services)

RE: restricted to a group specified by the consortium (including the Commission Services)

CO: confidential, only for members of the consortium (including the Commission Services)

7.1.6. Deadline

All deliverables bear their submission date, extracted from the page of reference which the user will find at the beginning of each project document.

7.1.7. Work package

All deliverables are indexed according to the different work packages/actions as defined by the EC Grant Agreement, Annex I.

7.1.8. Upload documents

The 'Documents library' allows a project participant to upload documents into organised categories and make them available to the consortium. Certain documents, however, may only be uploaded by the project coordinator or the management team.

7.1.9. Edit a document

With the Edit button, documents can be amended if necessary. An additional file can be uploaded and/or the previous file(s) replaced. Users can add up to three different files in one document item, but at least one file must be uploaded. If no files are uploaded, the original file will remain in place.

7.1.10. Undo upload

Users have the possibility to reverse an upload action, if for example he/she has accidentally uploaded the wrong document file. Document files cannot be retrieved once they have been deleted; however, 'Deleted Items' are listed at the bottom of the page. In case, any document has been deleted by mistake, ProjectAngel should be contacted immediately (projectangel@p-medicine.eu).

7.1.11. Document history

The history action allows users to track a document by displaying a list of the document's previous versions. Clicking the 'History' link will display the previous document versions in chronological order, top to bottom from newest to oldest entry. Each item contains the document's date, author and — if available — a link to the viewable document. In the 'History' mode a previous document version can be placed at the top of the listing i.e. the overview page by clicking the Restore button. Restoring a document will copy the file item and place it at the top of the list. In the field Creation date the date on which the re-store action was carried out will be displayed. The Restore function may only be carried out by the coordinator.

7.1.12. Notification

Depending on the type of document and the settings defined by the coordinator, a brief notice may be posted in the 'Project Bulletin/Document Tracking' section and an e-mail sent to the consortium once a file has been uploaded, edited or deleted.

7.2. Contracts

p-medicine Public ProjectAngel Sitemap ? Print Logout

Communication
Coordination
Documents library
 ▶ **Contracts** Upload documents ▶
 ▲ Deliverables
 ▲ Dissemination materials
 ▲ EC & Management reports
 ▲ Meeting materials
 ▲ News & Memos
 ▲ Shared documents
 Meetings
 Monitoring
 Publications
 Reporting
 Service centre
 Who is who
 Work plan

Contracts

Grant agreement + Annexes			
N°	Title	Last saved on	
1.00.0	EC Grant Agreement (signed)		<input type="button" value="Edit"/>
1.00.1	Annex I - Description of Work (Version:)		<input type="button" value="Edit"/>
1.00.2	Annex II - General conditions (Version:)		<input type="button" value="Edit"/>
1.00.3	Annex III - Non applicable		<input type="button" value="Edit"/>
1.00.4	Annex IV - Form A - Accession of beneficiaries to the Grant Agreement (Version 2, 01/12/2009)		<input type="button" value="Edit"/>
1.00.5	Annex V - Form B - Request for accession of a new beneficiary to the Grant agreement (Version 2, 01/12/2009)		<input type="button" value="Edit"/>
1.00.6	Annex VI - Form C - financial statement for Collaborative Projects (Version 3, 01/12/2009)		<input type="button" value="Edit"/>
1.00.7D	Annex VII - Form D - Certificate of Financial Statements (Version 3, 01/12/2009)		<input type="button" value="Edit"/>

Consortium Agreement		
N°	Title	Last saved on

Financial Documents			
N°	Title	Last saved on	
3.00.0	Grant Agreement Preparation Forms (Project No. 270089)		<input type="button" value="Edit"/>

🗳 Archive/Deleted Items (0 item(s))

◀ Back

Figure 16 Documents library/Contracts directory

The 'Contracts' directory covers all contractual documents that are relevant to the entire project consortium, e.g. the EC Grant Agreement (including annexes and contractual amendments), Consortium Agreement and Financial Documents. Generally, only the persons setup in ProjectAngel as 'Scientific coordinator' (currently: Prof. Dr. Norbert Graf, Meike Reimann) and 'Administrative coordinator' (currently: Corinna Hahn, Janine Hintz) are authorised to upload contractual documents.

Nevertheless, the user can download or view any official document listed in the table by clicking on the *.pdf-icon. All documents are categorised according to their contractual nature – grant agreement, consortium agreement, and financial documents –, and sorted by number and title.

7.3. Deliverables

7.3.1. All deliverables

Status ?	N°	Title	Last saved on	Security ?	Deadline	Type ?	Leading Participant	WP
<input type="checkbox"/>	D01.01	Management guide	25.11.2010	CO	31.01.2011	Report	EURICE	WP01
<input type="checkbox"/>	D01.02.01	Periodic Reports	25.11.2010	CO	31.10.2011	Report	EURICE	WP01
<input type="checkbox"/>	D01.02.02	Periodic Reports	25.11.2010	CO	31.10.2012	Report	EURICE	WP01
<input type="checkbox"/>	D01.02.03	Periodic Reports	25.11.2010	CO	31.10.2013	Report	EURICE	WP01
<input type="checkbox"/>	D01.02.04	Periodic Reports	25.11.2010	CO	31.10.2014	Report	EURICE	WP01
<input type="checkbox"/>	D02.01	State of the art review of the p-medicine environment	25.11.2010	PU	30.06.2011	Report	USAAR	WP02
<input type="checkbox"/>	D02.02	Definition on scenarios and use cases and report on Scenario based user needs and requirements	25.11.2010	PU	30.06.2011	Report	FhG	WP02
<input type="checkbox"/>	D02.03	Specification of the required integration with other research infrastructure initiatives	25.11.2010	PU	31.10.2011	Report	UDUS	WP02
<input type="checkbox"/>	D02.04	Requirements for enhancing VPH models for clinical decision support	25.11.2010	PU	31.10.2011	Report	BIOVISTA	WP02
<input type="checkbox"/>	D02.05	Specification of tools and services supporting patient empowerment	25.11.2010	PU	31.10.2011	Report	ecancer	WP02
<input type="checkbox"/>	D02.06	Regular update of the user needs and requirements based on evaluation and validation of the pmedicine environment	25.11.2010	PU	31.10.2012	Report	USAAR	WP02
<input type="checkbox"/>	D02.06-	Regular update of the user needs and requirements based on evaluation and validation of the pmedicine environment	25.11.2010	PU	31.10.2013	Report	USAAR	WP02
<input type="checkbox"/>	D03.01	State-of-the-Art report on Standards	25.11.2010	PU	31.05.2011	Report	UCL	WP03
<input type="checkbox"/>	D03.02	Initial system architecture	25.11.2010	RE	31.10.2011	Report	FORTH	WP03
<input type="checkbox"/>	D03.03	Annual Report on the Open Consultation Process and Architectural Refinements	25.11.2010	PU	31.10.2012	Report	FhG	WP03

Figure 17 Documents library/All deliverables

The 'Deliverables' directory lists all project deliverables defined in the EC Grant Agreement, Annex I. The user can sort the deliverables according to their corresponding number, their delivery date, the leading beneficiary or the deliverable status. The user must click on the respective link at the top of the page to select a viewing option.

7.3.2. Deliverables/In progress

Here partners can upload and exchange outstanding deliverables in the form of document files as often as necessary. Once the deliverable has been submitted by the project coordinator, or (provisionally) accepted or rejected by the European Commission, however, the document files are automatically displayed by the 'Submitted/approved' feature where they can no longer be modified.

To submit, accept or reject a deliverable the coordinator must click 'edit' and select the new status of the respective document from the drop-down menu. Other members of the consortium are not authorised to carry out this measure, which is only reserved for the coordinator and their Project Management Team, and therefore cannot see the 'Edit'-button.

A news bulletin is automatically generated in 'Document Index' and the consortium is notified about the submission via e-mail⁶, when the deliverable is transferred to the 'Documents library'. Until then no notice will be sent out.

7.4. Dissemination materials

The screenshot shows the 'Dissemination materials' section of the ProjectAngel Documents library. The left sidebar contains a navigation menu with items like 'Communication', 'Coordination', 'Documents library', 'Contracts', 'Deliverables', 'Dissemination materials', 'EC & Management reports', 'Meeting materials', 'News & Memos', 'Shared documents', 'Meetings', 'Monitoring', 'Publications', 'Reporting', 'Service centre', 'Who is who', and 'Work plan'. The main content area has a 'New Entry' button and a table with the following structure:

N°	Title	Last saved on	Institution
Archive/Deleted Items (0 item(s))			

At the bottom left of the page, there is a 'Back' link.

Figure 18 Documents library Dissemination materials

The 'Dissemination materials' directory stores partner contributions relevant to the project's dissemination activities e.g. papers, articles, press releases, and posters undertaken during the project duration.

⁶ Bulletin entries and e-mail notices regarding the upload of new documents, are generated every six hours throughout the day (6 a.m./12 a.m./6 p.m./12 p.m.) to reduce the amount of e-mail traffic

7.5. EC & Management reports

In the 'EC & Management reports' directory the user will find the official, final versions of the different periodic reports. Furthermore, internal reports could also be stored if applicable (see also chapter 12.2, p. 71).

7.6. News & Memos

The 'News & Memos' directory includes all project internal news documents like newsletters, memos, etc.

7.7. Meeting materials

The 'Meeting materials' directory includes all documents – such as meeting minutes, presentations slides, final programmes, etc. – used in the project meetings, workgroup meetings, or workshops (see also chapter 8, 'Meetings'). All documents are sorted by event in chronological order – top down from the latest to the oldest entry.

7.8. Shared documents

Project partners can upload and exchange working documents concerning the various actions. This feature is intended as an exchange platform for working documents only and is therefore additionally reflected in the 'Work plan' (see chapter 15, p. 80). For a better overview users can sort the documents according to title, author and date by clicking on the respective title in the table.

8. Meetings

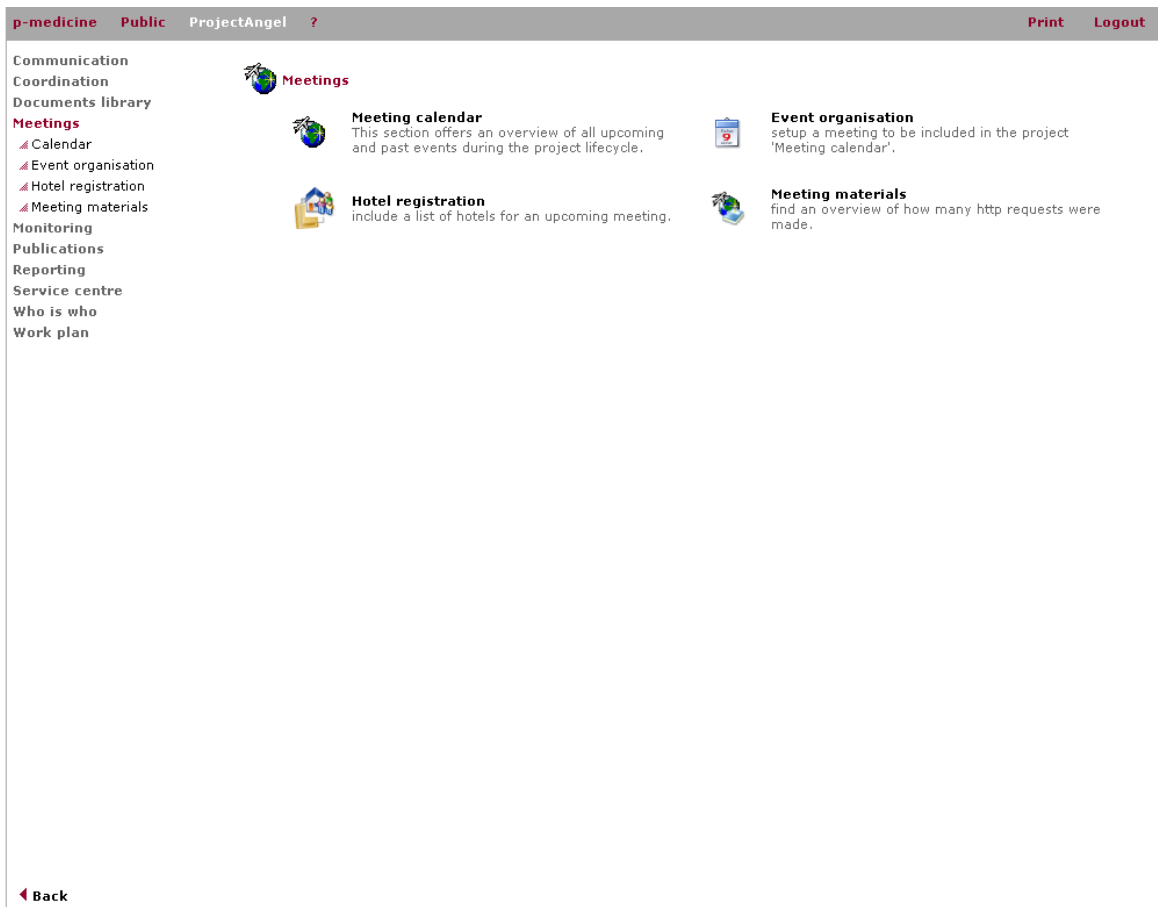


Figure 19 Meetings/Overview

Since project events vary in size, objective and target group, different event types define the nature of the event. In the p-medicine project, the 'Meeting calendar' categorises them into: review/management committee meetings, study visits, project progress meetings, conferences, workshops and workgroup meetings.

The 'Meeting calendar' sub module always displays the project events of the current year. It can, however, be sorted to view past or future events. The selection of the year has to be carried out via the drop-down menu. All documents are sorted by event in chronological order – top down from the latest to the oldest entry. Additional materials will be posted as they become available prior to the meeting.

8.1. Calendar

The screenshot displays the 'Meeting calendar' interface within the ProjectAngel system. The top navigation bar includes 'p-medicine', 'Public', 'ProjectAngel', and a help icon, along with 'Print' and 'Logout' options. A left sidebar lists various project management functions such as 'Communication', 'Coordination', 'Documents library', 'Meetings', 'Calendar', 'Event organisation', 'Hotel registration', 'Meeting materials', 'Monitoring', 'Publications', 'Reporting', 'Service centre', 'Who is who', and 'Work plan'. The main content area is titled 'Meeting calendar' and features an 'Upload meeting material' button. Below this, event details are listed in a table-like format: Event Name (PM_01: Kick-off meeting/02-2010, Homburg), Date (13.02.2011 to 15.02.2011), Category (PM Project Progress Meetings), Location (Schlossberghotel, Homburg (Germany)), and Organiser (Janine Hintz, j.hintz@eurice.eu). To the right, there are two menu sections: 'Meeting Materials' with options for Agenda, Meeting Minutes, Other, and Presentations; and 'Meeting Organisation' with an option for Hotel Information. The 'Event Details' section contains a photograph of the Schlossberghotel building, followed by contact information for the Universitätsklinikum des Saarlandes, including the address (Kirrberger Straße, 66424 Homburg/Saar), phone (+49 6841 16-28397), and fax (+49 6841 16-28302). A 'How to reach us:' section provides a link to a map of the Saarland University, Campus Homburg. A 'Back' button is located at the bottom left of the main content area.

Figure 20 Meeting calendar/Event details

The 'Meeting calendar' lists the project event's title, date (beginning and end), category, location and organiser i.e. person responsible for the local project organisation.

Detailed information as well as accompanying documents – such as city maps, schedules, meeting programmes, presentations slides, meeting minutes, etc. – are centrally stored, but presented according to each individual meeting in the 'Event details' sub module. This also supports the project event organisation, hotel reservation process as well as the post processing of the different events.

The sub module is directly linked to the 'Documents library' where the data files are located and sorted by event in chronological order – top down from the latest to the oldest entry (see also chapter 7.7, 'Meeting materials').

8.2. Event organisation

p-medicine Public ProjectAngel ? Print Logout

Communication
Coordination
Documents library
Meetings
 Calendar
 Event organisation
 Hotel registration
 Meeting materials
Monitoring
Publications
Reporting
Service centre
Who is who
Work plan

Event organisation ▶
Hotel registration ▶

← **Calendar**

Please, register a new meeting/event.

Project Meetings/Events

All fields marked with * must be filled in. If certain information cannot be provided please type 'to be defined / tbd' or 'not available / n.a'

Event registration requested by (name or email):

Event name*:

Start date*:

End date*:

Category*:

Location/Venue*:

City*:

Country*:

I plan to use an online scheduling tool (e.g. doodle) to set up the event. The site the consortium needs to access is:

Project partner acting as contact person/local organiser

Name*:

Email*:

2nd email:

Event registration

I would like to have project partners register online for this event*:

Please send the registration notice to myself and:

Hotel information

I would like to attach a list of hotels for this meeting / event*:

If you wish to include a list of hotels for the project partners, please submit this form now and continue on the next page. Thank you.

← Back

Figure 21 Event organisation

Via an online form the project members can request the setup of a new meeting/event in the 'Meetings' module. All fields marked with * must be filled in as to guarantee a proper registration process. Certain information that cannot be provided has to be substituted with remarks such as 'to be defined' or 'not available'.

8.3. Hotel registration

A list of hotels for an upcoming meeting can also be submitted via an online form. It will then be included with the corresponding meeting in the 'Meetings' module. Once a hotel is registered it can be selected for any other upcoming meeting – handy, if e.g. work progress meetings always take place at the same location.

8.3.1. Upcoming events

[p-medicine](#) [Public](#) [ProjectAngel](#) ? [Print](#) [Logout](#)

Communication
 Coordination
 Documents library
Meetings
 Calendar
 Event organisation
 Hotel registration
 Meeting materials
 Past events
 Upcoming events
 Monitoring
 Publications
 Reporting
 Service centre
 Who is who
 Work plan

Meeting materials/Upcoming events

Calendar
[Past events](#) ▶
[Upcoming events](#) ▶

If the meeting you wish to upload organisational material for is not listed here, please make sure that you have registered it first via the 'Event organisation' feature. Otherwise, if you have just registered the meeting, than the submitted data is still being processed and it will be listed shortly. Thank you for your patience.

Upload meeting materials for:

PM_01: Kick-off meeting/02-2010, Homburg			
Type	Title	Last saved on	Security ?
PCC Meetings M12			
Type	Title	Last saved on	Security ?
PCC Meetings M24			
Type	Title	Last saved on	Security ?
PCC Meetings M36			
Type	Title	Last saved on	Security ?
PCC Meetings M48			
Type	Title	Last saved on	Security ?

Archive/Deleted Items (0 item(s))

[Back](#)

Figure 22 Meeting materials/Upcoming events

To facilitate the meeting preparation and/or organisation, documents related to upcoming or past project meetings may be uploaded by all project members. The meeting materials are additionally displayed in the 'Documents library' (see also chapter 7.7, p. 35). Documents that should be uploaded are not restricted in size. Users may encounter problems, however, as some firewalls or browsers restrict the file size of uploaded documents.

The 'Meeting materials' are categorised in different types for which various notification procedures are set in motion when uploading a file.

- For documents classified as 'Agenda' or 'Other' an e-mail notice is sent to the consortium and a 'Document Tracking' bulletin is generated as soon as they have been uploaded in ProjectAngel.
- For documents classified as 'Presentation' or 'Meeting Minutes' a accumulative e-mail notice is sent to the consortium and a 'Document Tracking' bulletin is generated once a certain time period (currently: three days) has passed after the meeting.

8.3.2. Past events

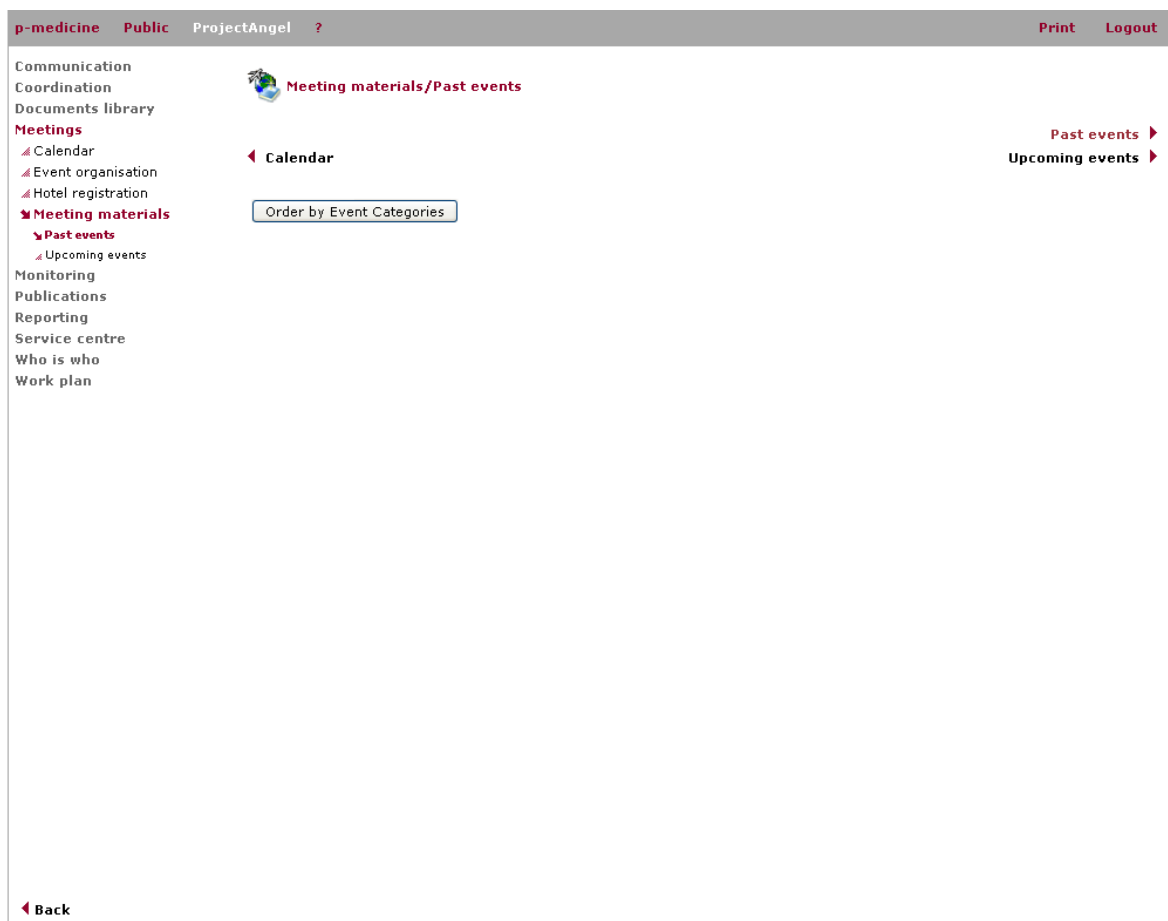


Figure 23 Meeting materials/Past events

Project partners may continue to upload meeting materials after the end of the meeting by clicking on the corresponding link 'past event' at the top of the page. The uploaded documents will be saved directly here and additionally displayed in the 'Documents library' (see also chapter 7.7, p. 35). Furthermore, a news entry will be generated in 'Document index' as well as an e-mail notice sent to the consortium via the doc-tracking@p-medicine.eu

9. Monitoring

p-medicine Public ProjectAngel ? Print Logout

Communication
Coordination
Documents library
Meetings
Monitoring
▲ Financial data
▲ Next actions
▲ Web statistics
Publications
Reporting
Service centre
Who is who
Work plan

Monitoring

Financial data
This section offers an overview of planned and actual efforts as well as costs for the respective reporting periods.

Next actions
Record upcoming deadlines, individual tasks etc. to manage next steps and actions.

Timesheets
access and upload timesheets of your institution. Access is restricted to authorized persons of your institution.

Web statistics
find an overview of how many http requests were made

◀ Back

Figure 24 Monitoring/Overview

Monitoring consists of those processes performed to observe project execution so that potential problems can be identified in a timely manner and corrective actions can be taken – when necessary – to control the execution of the project. The key benefit of the different features of the ‘eu

10. Monitoring

' module is that project progress is observed and measured regularly. This includes:

- Measuring the ongoing project activities (via the 'Next actions');
- Monitoring the costs and efforts against the EC Grant Agreement, Annex I (via the 'Financial data');
- Identify the website users and provide statistical data that support the dissemination activities (via the 'Web statistics').

10.1. Financial data

10.1.1. Personnel efforts/costs

10.1.1.1. Planned efforts

For a better comparison of the actual and planned efforts users can enter the planned personnel efforts for each project month in person hours (as opposed to listing them in Person Months for the entire project duration as indicated in the EC Grant Agreement, Annex I). Recording the planned efforts, however, is optional and is not relevant for the financial reporting.

10.1.1.2. Person hours/charged

Only the actual hours worked by a person directly carrying out work under a project may be charged. Working time is the total number of hours, excluding holidays, personal time, sick leave, or other allowances. The actual hours should be entered here on a monthly basis throughout the project duration. In addition, the working time has to be attributed to one or several of the project's work packages (Please refer also to 'Guide to Financial Issues relating to FP7 Indirect Actions', p. 42ff.).

10.1.1.3. Personnel costs/charged

The screenshot displays the 'Personnel efforts/costs' monitoring interface in ProjectAngel. The interface includes a navigation menu on the left with options like 'Communication', 'Coordination', 'Documents library', 'Meetings', 'Monitoring', 'Financial data', 'Personnel efforts/costs', 'Next actions', 'Web statistics', 'Publications', 'Reporting', 'Service centre', 'Who is who', and 'Work plan'. The main content area has tabs for 'Planned efforts', 'Person hours charged', 'Personnel costs charged', 'Personnel settings', and 'Conversion Factor'. The 'Personnel efforts/costs' section is active, showing a form for 'Beneficiary' (USAAR) and 'Person' (Graf Norbert). Below the form is a table with columns for months (Nov 2010, Dec 2010, Jan 2011, Jun 2011, Jul 2011, Aug 2011, Sep 2011, Oct 2011) and a 'Total [hours]' column. The table contains 13 rows of data, all showing 0.00 values.

WP	Nov 2010	Dec 2010	Jan 2011	Jun 2011	Jul 2011	Aug 2011	Sep 2011	Oct 2011	Total [hours]
WFP01	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP02	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP03	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP04	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP06	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP07	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP08	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP10	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP11	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP12	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
WFP13	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Figure 25 Monitoring Financial data/Person hours charged

The European Commission stipulates in their guide to financial issues, that personnel costs "should reflect the total remuneration: salaries plus social security charges (holiday pay, pension contribution, health insurance, etc.) and other statutory costs included in the remuneration."

In accordance with these guidelines, users have to enter the monthly personnel costs charged on the project for each employee.

10.1.1.4. Personnel settings

The entry made in 'Function / Staff' should clearly describe the person's working position. This information will be reflected in the 'Periodic Report' under 'Explanation of the use of the resources'. Users may indicate whether the occupation status of the individual is temporary, permanent or casual in 'Type of employment contract' and specify this information of full-time/part-time employment as a percentage number, together with the contract's duration.

All personnel details can only be viewed by the person(s) responsible for reporting the project's financial data (generally team leader and/or financial administrator) and the project coordinator.

10.1.1.5. Conversion factor

The planned personnel efforts for each work package (as indicated in the Grant Agreement, Annex I) are recorded in 'Person Months'. The EC, however, stipulates in their guide to financial issues that only the hours worked on a project should be charged as direct costs and reported in the periodic progress reports.

The productive hours must be calculated according to the beneficiary's usual accounting and management principles and practices. The average annual hours actually worked per person in employment as reported by OECD countries in 2007, for example, ranged from a minimum of 1389 hours (Netherlands) to a maximum of 2316 hours (South Korea), i.e. 116 hours/month (Netherlands) and 193 hours/month (South Korea). ProjectAngel uses 140 hours per month and full-time employment as a standard number of productive hours applied to all employees to calculate one person month in the project.

The financial administrator of each beneficiary has to enter the specific amount in the conversion factor field, if his/her institution calculates one 'Person Month' with a different number of productive hours (other than 140 hours). The actual conversion rate should be calculated and entered up to the deadline for financial reporting of each (internal and/or official) progress report at the very latest, as it is used throughout 'FP7 reporting' for example in 'Work progress and achievements during the period (TL)' (see chapter 12.1.2, p. 55) and 'Explanation of the use of the resources' (see chapter 12.1.6, p. 60).

10.2. Next actions

The screenshot displays the 'Next actions' form in the ProjectAngel system. The form is titled 'Edit/New Task' and includes the following fields and options:

- Category:** Phone Conference (dropdown menu)
- Status:** Radio buttons for: (not submitted / not finalised), (in progress / submitted but not approved), (accepted / finalised), and (overdue).
- Responsibility of:** (dropdown menu)
- Deadline:** (calendar icon)
- Task:** Task title (text input), Task description (text area)
- Hyperlink:** Radio buttons for: Online EPSS, Service Centre/Proposal templates (with document title/no. input), and Other (with URL and Title inputs).
- Email notification:** Check box with label 'Send email to the person named in 'Responsibility of'.'

Buttons for 'Cancel' and 'Preview' are located at the bottom of the form. A 'Back' button is visible in the bottom left corner of the interface.

Figure 26 Monitoring/Next actions

It is important to plan ahead when a project has started. Managing a European project is a collaborative enterprise that depends on the timely contributions of all consortium members. The final submission deadline of reports and deliverables to the European Commission sets the schedule and mandates when each task has to be fulfilled. Consortium members have the responsibility to report immediately to the coordinator any risk situations that may conflict with the project objectives or their successful completion. Changes in scheduling of deliverables and or allocated budget are to be reported as quickly as possible to the coordinator and the other consortium members. It is expected that possible critical issues will become apparent very quickly in the context of day-to-day communication between the consortium members, possible solutions will be elaborated by discussion among all consortium members concerned. The coordinator, supported by PMO will set the schedule for solution-finding and will chair the discussions. In case of critical deviations from the planned work plan, the European Commission will be informed and consulted. Therefore it is essential to ensure that the work flow is clearly structured with set deadlines and clearly defined responsibilities. All of which must be based on the different EC's guidelines and project requirements.

The 'Next actions' enables ProjectAngel users – especially the coordinator – to plan, monitor and present the necessary next steps in the different work packages. Furthermore, this task list is visible to the entire consortium, thus creating an awareness of the schedule that must be kept in order to ensure a timely and successful project progress. The 'Next actions' list marks the tasks themselves, the tasks' deadlines, and persons responsible for carrying out these tasks. Each task has to be defined by the coordinator – after consultation with the responsible person – according to following criteria: category, status, responsibility, deadline, and task description.

10.2.1. Category

The designation of a task to a specific category should enable a quick identification and an efficient retrieval of the required information. ProjectAngel offers a set of predefined categories that are based on typical project issues. In addition, categories can be created by the coordinator according to his/her project-specific requirements.

10.2.2. Status

The status of a particular task is marked by a flag. These flags use the traffic light logic – red, yellow, green – for displaying and supervising the work progress. Initially all tasks are indicated with a single red flag, as 'not been submitted and not finalised'. As the task progresses the coordinator can update its status to indicate the following:



Indicates that the task has not been submitted and not finalised;



Indicates that the task is in progress of submitted but not finished;



Indicates that the task has been accepted and finished ;



Indicates that the task is overdue.

10.2.3. Responsibility of ...

To increase the accuracy and appropriateness of task assignments, this column details the responsible person/Work package leader (indicated with first and last name), assigned for completing a task.

10.2.4. Deadline

This column displays the deadline for a particular task in the following format: dd/mm/yyyy

10.2.5. Task

This column provides a short description of the task. Further information on a task may be available, in which case a forward icon (>>) will be displayed. Select this link and obtain a full task description.

10.2.6. Edit a task

This feature is reserved, i.e. visible, solely for the project coordinator. By clicking the pencil an online form will be displayed that the coordinator can use to edit the selected task. Here he/she can edit or enter a detailed instruction how to realise a task (in up to a maximum of 1,000 characters). Each time the coordinator saves any change, the creation and/or modification time is clearly marked through trusted time stamping at the top of the task list e.g. last update: Jan 01, 2010 – 14:11.

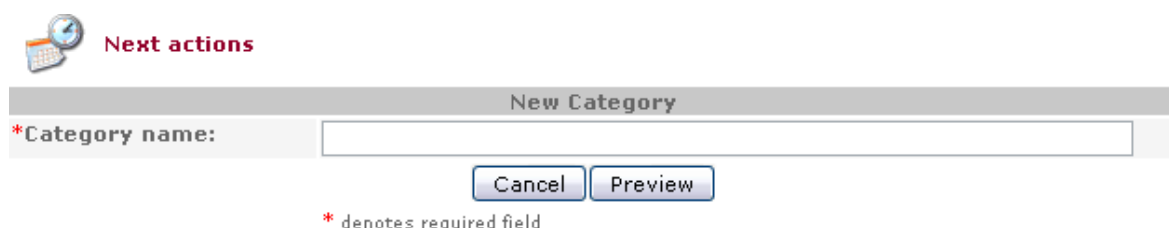
10.2.7. Delete a task

This feature is reserved, i.e. visible, solely for the project coordinator.

10.2.8. Add a new task

This feature is reserved, i.e. visible, solely for the project coordinator. The coordinator can use this form to create a new task. Please follow the instructions as described under 'Edit a task' (see above).

10.2.9. Add a new category



Next actions

New Category

*Category name:

Cancel Preview

* denotes required field

Figure 27 Window 'New category'

This feature is reserved, i.e. visible, solely for the project coordinator. Here, the coordinator can type in the description of new task category. This new category will then be displayed in the directory for all ProjectAngel users.

10.3. Timesheets

According to the Guide to Financial Issues relating to FP7 Indirect Actions, “[...] only the costs of the actual hours worked by the persons directly carrying out work under the project may be charged. [...] Working time to be charged must be recorded throughout the duration of the project by any reasonable means (e.g. timesheets).”

Organisation: **name of institution**
 Person: **Valentin Draft**

Number of hours envisaged i.e. according to the employment contract: **20 hours/week**

2009 January

Date	Indicate the time in hours							Only the yellow cells are writeable																								Total	Notes	
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31			
Day	Sun	Mo	Tue	Wed	Thu	Fri	Sat	Sun	Mo	Tue	Wed	Thu	Fri	Sat	Sun	Mo	Tue	Wed	Thu	Fri	Sat	Sun	Mo	Tue	Wed	Thu	Fri	Sat	Sun	Mo	Tue			
EU Projects																																		
RTD Activities																																		
Project x		3	4	7	8									3,5		3	2	8	9	4										7	0	58,5	WP3	
Project y		6	5			5,5																								8	23,5	WP8		
Project z																																0		
Total RTD	0	8	9	7	8	5,5	0	0	0	0	0	0	0	3,5	0	3	2	8	9	4	0	0	0	0	0	0	0	0	0	7	8	82		
Demonstration																																		
Project x																																0		
Project y																																0		
Project z																																0		
Total Demonstration	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	
Management																																		
Project x													8	3,5			5			1												17,5	WP1	
Project y																																0		
Project z																																0		
Total Management	0	0	0	0	0	0	0	0	0	0	0	0	8	3,5	0	0	5	0	0	1	0	0	0	0	0	0	0	0	0	0	0	17,5		
Other Activities																																		
Project x							3								5																	8	WP7	
Project y																																0		
Project z																																0		
Total Other	0	0	0	0	0	0	3	0	0	0	0	0	0	0	5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	8		
Internal and National Projects																																		
Teaching																																		
B						2,5										8	1			3												12,5		
C																																0		
Total	0	0	0	0	0	2,5	0	0	0	0	0	0	0	0	0	8	1	0	0	3	0	0	0	0	0	0	0	0	0	0	0	12,5		
Illness and activities not to be part of productive hours																																		
Annual Leave																																		
Special Leave						0																			8	8	8					32		
Illness									8	8	8																					24		
Training / internal meetings	1													0,5																	2,5			
Total	1	0	0	0	0	0	0	0	8	8	8	0	0	0,5	0	0	0	0	0	0	0	0	0	0	0	8	8	8	8	1	0	0	58,5	
Total productive hours	0	8	9	7	8	8	3	0	0	0	0	0	8	7	0	5	9	8	9	8	0	0	0	0	0	0	0	0	0	7	8	120		
Total hours																																	178,5	

Signed: _____ Approved: _____

Date and Signature _____ Date and Signature _____

Productive hours per project:	Project x	84
	Project y	23,5
	Project z	0

Time of illness and training / internal meetings:	Hours:	26,5
	Days (here 8 hours are one day):	3,3

If the days are higher than 15 for a duration of one year the time should be duly justified (Financial Guide, Version 02/04/2009, page 45)

Figure 28 Example of a timesheet template according to the 'Guide to Financial issues relating to FP7 Indirect Actions', p. 49

In order to meet the EC's requirements concerning personnel costs, ProjectAngel enables the beneficiaries to electronically store their individual time-keeping records. Regularly saving the signed timesheets in a central storage area can make the periodic reporting easier, and in the case of an external audit ensure that a complete and comprehensive documentation is available throughout the project's duration. It is important to note, however, that the use of this directory is not obligatory!

The timesheets stored in ProjectAngel are used only to record a beneficiary's working time and to document it for the EC and its appointed auditors. They are not used to monitor a person's conduct or level of achievement.

The EC has announced that it will greatly increase the number of external audits it commissions for FP6 and FP7 projects. Working time that is not officially recorded and verified (e.g. signed timesheets) and which has been charged to the project must be repaid; also the EC has threatened penalties for systematic lapses (copies of the timesheets must be kept for five years after the end of the project).

10.4. Web statistics

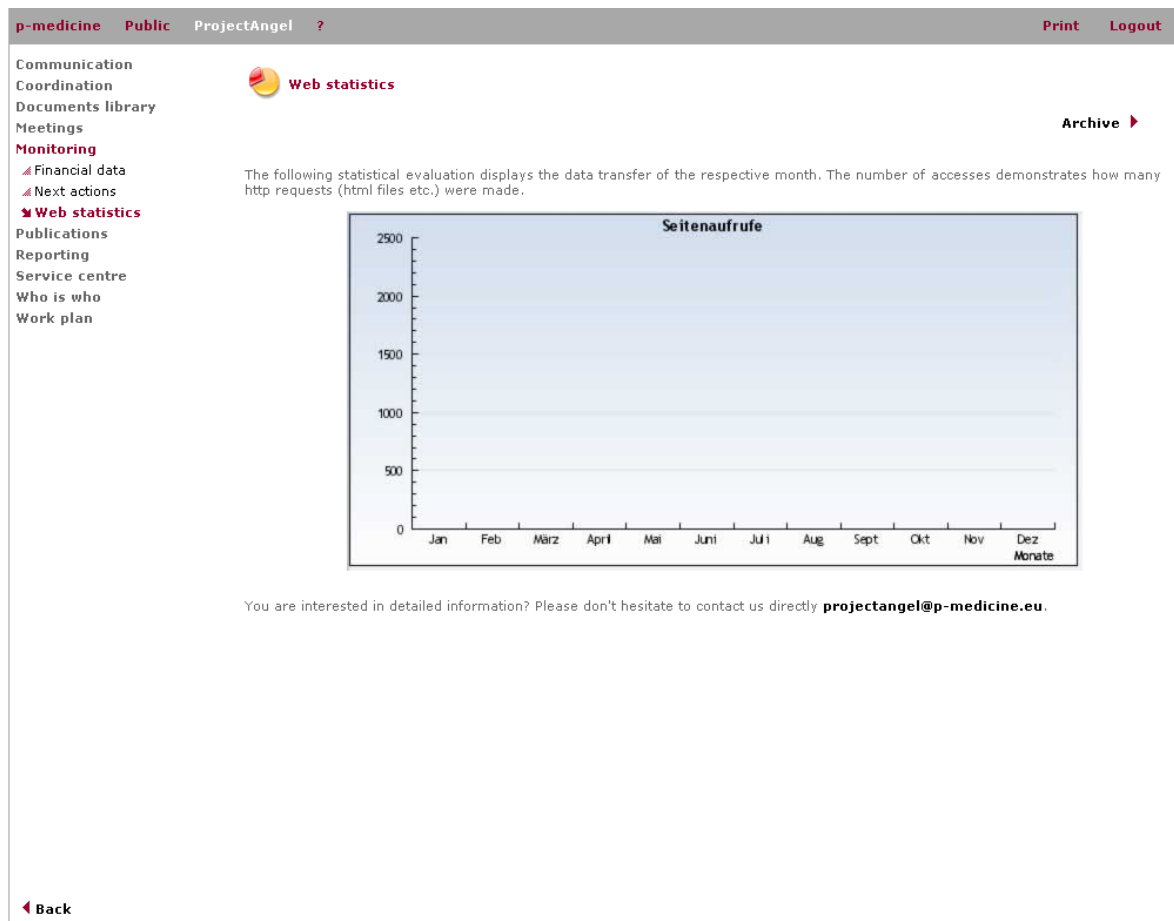


Figure 29 Web statistics

This feature informs the user how many visitors have accessed the project website in the last months. This information allows him/her to better identify the website users and provides statistical data that can support project dissemination activities. The main page displays a general overview of the current year. For more detailed information concerning the web statistics of each month the user clicks either 'archive' at the bottom of the page or in the left navigation bar the sub-item 'web statistics' of the related year.

In the archive the user will find statistics and tables concerning the total hits as well as lists rating each web page according to the number of hits it received. This analysis summarises all pages downloaded by an individual valid visitor - identified through his/her IP address and browser - into one visit⁷. This overview statistic will be produced at the end of each calendar year.

⁷ A single visitor is counted as such when he/she views at least one page impression, i.e. entirely downloaded pages with response values of 200 and 304 without elements like images and files with .png, .jpg, .jpeg, .gif, .swf, .css, .class or .js. The time span between singles page impressions cannot exceed 30 minutes. One visit can last up to 30 minutes.

11. Publications

Participants in projects funded under the Seventh Framework Programme (FP7) are required to use and disseminate the results generated by the project ('foreground'). Dissemination can be seen as the means (i.e. press releases, conferences, scientific publications, exhibitions, workshops, newsletters, websites, etc.) through which research results are presented to the public. The target audience of the dissemination may be the general public or a specific group of professionals in a determined sector. In general this depends on the foreground itself and the nature of the dissemination activities, which may address a larger or more limited group of professionals, consumers and end-users.

During and after the project the European Commission requires that the coordinator provides references of all scientific publications relating to foreground at the latest two months following publication (see Guidance Notes on Project Reporting, Version June 2010, p. 6). In addition, as part of the final project report, the consortium has to provide to the European Commission with a plan for the use and dissemination of foreground where under 'Section A' different lists should be produced. The first one includes all dissemination activities and the second one provides an overview of all scientific (peer reviewed) publications relating to the foreground of the project, starting with the most important ones (see Guidance Notes on Project Reporting, Version 06/2010, p. 25). In the framework of reporting the project results to the European Commission, these tables have to be cumulative, which means that they should always show all publications and activities from the beginning until after the end of the project.

Publications

Dissemination activities
report all dissemination measures carried out in the context of the project, such as meetings, press releases, conferences, workshops.

Peer-reviewed publications
report any scientific publications relating to foreground of your FP7 project.

Publication notice
all publications made in the context of an FP7 project have to acknowledge the funding by the European Community.

◀ Back

Figure 30 Publications/Overview

In this context the 'Publications' module allows partners to plan and list their publications and dissemination activities throughout the project life-cycle as they are planned/occur. The resulting list of publications/activities is available to the coordinator and all beneficiaries. This helps the coordinator keep track of the information required by the European Commission and when planned publications are reported via ProjectAngel it also helps meet the EC's condition to give all beneficiaries prior notice of any publication planned in the context of the project (of the Grant Agreement, Annex II.30.3).

An e-mail alert is sent every three months to remind partners to submit their publication information. Here the aim is to encourage the consortium to get into the habit of using the 'Publications' module to minimise the amount of data that needs to be collected and submitted when the periodic report is due. The information that is filled in bit by bit throughout the year is quickly on hand for the corresponding periodic report, since 'Publications' is directly linked with 'Reporting'. This means that if the user regularly enters his/her publications and dissemination activities, then at the time of the periodic report all that needs to be done is to check and possibly adjust the listed entries.

11.1. Dissemination activities

The new 'Dissemination activities' (available since 01/06//2010, ProjectAngel 7.1.6, see p. 90) allows all authorised participants to list their dissemination activities (publications, conferences, workshops, web, press releases, flyers, etc) carried out in the context of the project as they occur. This information is relevant for the periodic and final reports, and can be made public by the European Commission at the end of the project to demonstrate the added-value and positive impact of the project on the European Community.

Compared to the corresponding reporting section – where only team leaders and or the coordinator can enter and review such entries here in 'Publications' a wider range of project members are free to list their dissemination activities of any given period.

11.2. Publication notice

According to the EC Grant Agreement (Annex II.30.4), all publications or any other dissemination relating to foreground shall include the following statement to indicate that said foreground was generated with the assistance of financial support from the European Community. ProjectAngel displays a short notice providing the consortium members with quick access to all the necessary details in the specific project languages according to the Guide to Intellectual Property Rules (p. 44ff.).

The research leading to these results has received funding from the European Union's Seventh Framework Programme (FP7/2007-2013) under grant agreement n° 266073.

Currently this publication notice is translated/displayed in the following languages: English, French, German, Greek, Italian, Dutch, Polish, and Spanish.

11.3. Submit publication

'Submit publication' is the central feature of the 'Publications' module. Here users can list their publication(s); via an entry mask in which they type in the requested information. The publication date should be as accurate as possible. If the exact day cannot be determined, an approximate date should be given, e.g. 01/01/2010 – if the

publication was made in January 2010. This information is necessary to determine the respective reporting period that corresponds with the publication.

p-medicine Public ProjectAngel Sitemap ? **Print Logout**

Communication
Coordination
Documents library
Meetings
Monitoring
Publications
 ▲ Dissemination activities
 ▲ **Peer-reviewed publications**
 ▼ Add publication
 ▲ View publications
 ▲ Publication notice
Reporting
Service centre
Who is who
Work plan

Add publication

Fields marked with * have to be filled in.

Please note that according to the EC Grant Agreement Annex II.30 you must provide the Commission with details/references and an abstract of the publication at the latest two months following publication. Also an electronic copy of the published version or the final manuscript accepted for publication shall also be provided to the Commission at the same time.
 Try to provide as much of the requested information as possible. If at the moment you cannot complete some of the entries please enter tbd (to be defined) or n/a (not available). Later in 'View publications' you can complete the missing information using the 'Edit' button.

Title of publication*:

Main author*:

Coauthors:

Involved institutions:

<input type="checkbox"/> BIOVISTA	<input type="checkbox"/> CAU	<input type="checkbox"/> CUSTODIX	<input type="checkbox"/> ecancer
<input type="checkbox"/> EURICE	<input type="checkbox"/> FhG	<input type="checkbox"/> FORTH	<input type="checkbox"/> IBM Israel
<input type="checkbox"/> ICCS	<input type="checkbox"/> IEO	<input type="checkbox"/> LUH	<input type="checkbox"/> Philips
<input type="checkbox"/> PSNC	<input type="checkbox"/> SIB	<input type="checkbox"/> UCL	<input type="checkbox"/> UDUS
<input type="checkbox"/> UHök	<input type="checkbox"/> UOXF	<input type="checkbox"/> UPM	<input type="checkbox"/> USAAR

Abstract (max. 2000 characters):

Title of the periodical or the series*:

Number, date or frequency*:

Publisher*:

Place of publication*:

Relevant pages*:

Permanent identifiers (e.g. DOI):

Open access is/will be provided to this publication:

This field is mandatory when open access is/will be provided to the publication. Please indicate the embargo period in months.

◀ **Back**

Figure 31 Publications/Add publication

According to the requirements of the 'Template A: List of scientific peer-reviewed publications'⁸ users have to enter at least these following details: publication title, main author, title of the periodical or the series, number/date or frequency, publisher, place of publication, year of publication, relevant pages and a permanent identifier (if applicable) and if access to the related publication is given free of charge.

Depending on the settings defined by the coordinator, a user may however be able to enter the names of possible co-authors and/or select further institutions involved in the publication. In addition to a brief description the user may, be able to upload the publication itself or an abstract as a document file.

Before submitting their information partners must also decide whether or not they wish to inform the consortium about the publication. If they mark the respective checkbox an e-mail will be automatically generated and sent to all parties concerned. Additionally, the publication will be listed in 'View publications' under 'Pending consent'- for 15 days or until the publication date has been reached. According to the FP7 Grant Agreement, Annex II.30.3 the European Commission and all contractors have to be given 45 days prior notice of any publication planned in the context of the project. In case a publication is provided which has already been published the e-mail notification box has to be deactivated by clicking on it. After submitting a publication users can go back and edit their entry if necessary, as well as retroactively send out the e-mail notice to inform the consortium about the publication (see chapter 11.4.1, p. 53).

⁸ See: Guidance Notes on Project Reporting (Version 06/2010), p. 25

The intended publications appear in a table listing the title, institution, category, insertion date, and planned publication date as well as the respective report, notice and status. Should a partner wish to comment on a planned publication or view further information he/she can find a short summary of the planned publication under the corresponding 'Details'-button. Any objections to a publication of the planned document must be sent to the author/coordination team via the 'Publications' by the deadline listed in red. If within this period no such request is issued, the publication will be considered as accepted by the consortium. After the deadline for comments/objections has passed and a publication has been accepted by the consortium it will no longer be listed in 'Pending consent', but will instead appear in the other lists (see chapter 11.4, p. 53).

The information submitted via this feature is used in 'Reporting' for the corresponding progress report. In the section on 'Project management' the coordinator can see how many publications were made according to category, but the specific details such as title, author, etc. of a publication.

With the update of the 'Publications' module (ProjectAngel 7.1.3, see p. 91), the publication statuses have been reviewed and expanded so that they can accurately describe the various stages a document undergoes during publication. They are now as follows:

- Pending consent by the consortium: the document has been submitted to the consortium for comments. It has not been published yet.
- Vetoed by the consortium: the document has been vetoed by the consortium.
- Accepted by the consortium: the document's publication has been accepted by the consortium. It has not necessarily been published yet (e.g. pending approval from the editor).
- Cancelled: the document has been cancelled for publication.
- Peer reviewed: the document has been subjected to a peer review process. It has been accepted by the consortium, and has been published.

11.4. View publications

The 'Publications' module offers several viewing options. The most comprehensive is the 'All publications'-option, since all scientific publications from all partners are listed here. In addition, the user has the possibility to see the publications listed according to 'Beneficiaries' as well as which publications are or will be presented in the current project report under the 'Current report'-option. In general the lists are separated according to 'Planned Publications' and 'Publications'. Finally under the 'Pending consent'-option users can find the publications which are currently open to comments from the consortium.

11.4.1. Edit

Publication entries can be edited if necessary. The corresponding button 'Edit' is displayed in the last column of a publications list, and is only visible to the author(s) and the coordinator. If the option to send an e-mail notice was not activated when the publication was first submitted, then this can also be done retroactively with the 'Edit'-feature.

11.4.2. Search

The section 'All publications' can be searched for publications according to their publication date. The beginning and end date (dd/mm/yyyy) of the time frame in question must be typed in the entry boxes at the top of the page. The matching publications will be listed in the overview.

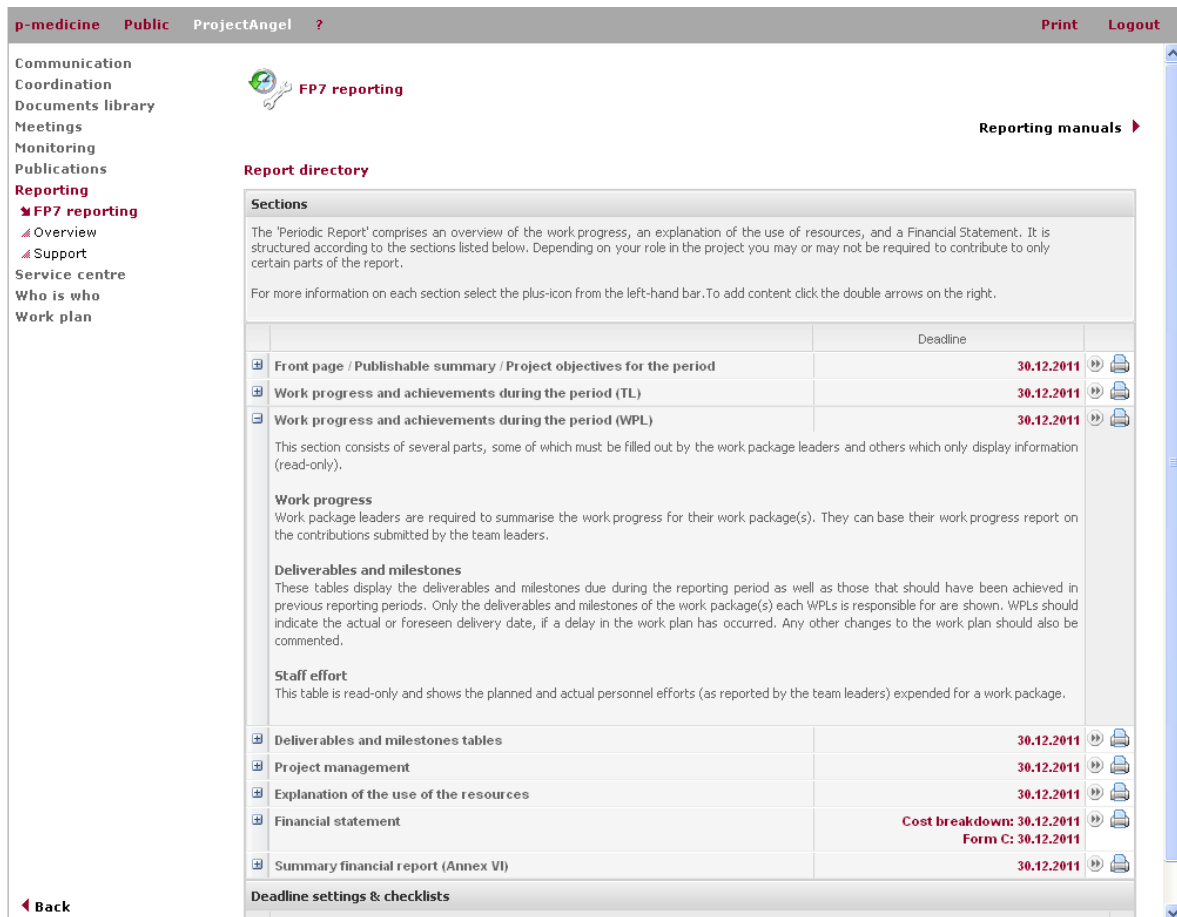
12. Reporting

The 'Reporting' module is divided into three different sub modules: 'FP7 reporting', 'Overview' and 'Support'.

12.1. FP7 reporting

This module allows ProjectAngel reporters to compile the project periodic reports, according to the EC Guidance Notes on Project Reporting. 'Periodic reports' must be submitted to the European Commission within 60 days of the end of each reporting period. The reporting titles/dates listed in the drop-down menu on the very first page refer to the reporting period(s) users can currently write their report for.

Generally only one reporting period is open. Two periods may overlap, however, during the time frame granted at the end of a reporting period to compose the 'Project Periodic Report'. In this case, users have to make sure to select the proper reporting period.



The screenshot shows the 'FP7 reporting' interface. On the left is a navigation menu with options like 'Communication', 'Coordination', 'Documents library', 'Meetings', 'Monitoring', 'Publications', 'Reporting' (selected), 'Overview', 'Support', 'Service centre', 'Who is who', and 'Work plan'. The main content area is titled 'Report directory' and contains a 'Sections' table. The table lists various report sections with their respective deadlines (all 30.12.2011) and icons for expand/collapse and print. A detailed description of the 'Work progress and achievements during the period (WPL)' section is visible, including sub-sections for 'Work progress', 'Deliverables and milestones', and 'Staff effort'. A 'Back' button is located at the bottom left of the main content area.

	Deadline	
Front page / Publishable summary / Project objectives for the period	30.12.2011	Print
Work progress and achievements during the period (TL)	30.12.2011	Print
Work progress and achievements during the period (WPL)	30.12.2011	Print
Work progress and achievements during the period (WPL) This section consists of several parts, some of which must be filled out by the work package leaders and others which only display information (read-only). Work progress Work package leaders are required to summarise the work progress for their work package(s). They can base their work progress report on the contributions submitted by the team leaders. Deliverables and milestones These tables display the deliverables and milestones due during the reporting period as well as those that should have been achieved in previous reporting periods. Only the deliverables and milestones of the work package(s) each WPLs is responsible for are shown. WPLs should indicate the actual or foreseen delivery date, if a delay in the work plan has occurred. Any other changes to the work plan should also be commented. Staff effort This table is read-only and shows the planned and actual personnel efforts (as reported by the team leaders) expended for a work package.		
Deliverables and milestones tables	30.12.2011	Print
Project management	30.12.2011	Print
Explanation of the use of the resources	30.12.2011	Print
Financial statement	Cost breakdown: 30.12.2011 Form C: 30.12.2011	Print
Summary financial report (Annex VI)	30.12.2011	Print

Figure 32 Report directory/Overview

The periodic report for each period shall address both the technical and the financial aspects of the project. It shall consist of sections described as follows: an overview of the work progress, an explanation of the use of resources, and a Financial Statement.

It is structured according to the sections required by the official EC guidelines (Guidance Notes on Project Reporting, June 2010):

1. Front page (including all basic data of the project)
2. Self declaration by the scientific coordinator
3. Publishable summary
4. Core of the report
5. Project objectives for the period
6. Work progress and achievements during the period
7. Project Management
8. Deliverables and milestones tables
9. Explanation of the use of the resources
10. Financial statements - Forms C and Summary financial report
11. Certificates

Depending on the user role in the project a beneficiary may or may not be required to contribute to only certain parts of the report.

12.1.1. Front page / Publishable summary / Project objectives for the period

This section consists of several parts, all of which must be filled out or checked by the project coordinator. Some parts, however, only display information (read-only).

12.1.1.1. Front page

This page is read-only. It represents the cover page of the 'Project periodic report'.

12.1.1.2. Publishable summary

This section is required by the European Commission. It covers the project work achieved so far and should be written, in such a manner that it can be directly published by the European Commission without any additional editing. Image files can be uploaded here to better illustrate the project work. This section should be updated for each periodic report.

12.1.1.3. Project objectives for the period

Here the project coordinator should summarise the project objectives planned/achieved in the reporting period. Any recommendations made by the EC project officer or similar authorities in previous reviews should be commented.

12.1.2. Work progress and achievements during the period (TL)

This section consists of several parts, some of which must be filled out by the team leaders and others which only display information (read-only). To help users/team leaders get acquainted with 'FP7 reporting', they should have a look at the respective manuals provided by ProjectAngel under 'Reporting/Support'. This document is also attached as Annex I – Manual 'PA7.1 – Team leader reporting in brief' (see p. 94).

12.1.2.1. Work progress

Communication
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Documents library
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Monitoring
Publications
Reporting
 FP7 reporting
 Overview
 Support
Service centre
Who is who
Work plan

Work progress and achievements during the period (TL)

Overview Work progress Deliverables Milestones Staff effort Dissemination activities

Reporting period: 1st Project Periodic Report (01.11.2010 - 31.10.2011)

Instructions - how?

Instructions - what?

Beneficiary: USAAR

Work package number: WPD01

Status: Draft

Work package title:

Start date or starting event:

Activity type:

Planned effort for the entire project duration: 12.00

Actual effort for the reporting period: 0.00

Objectives - progress achieved:

Description of work - details for each task and significant results:

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Figure 33 Team leader/Work progress

Team leaders are required to summarise the work progress of the project, which was achieved during the reporting period. They have to submit a work progress report if their institution is – according to the work plan - involved in a work package either as leading participant or through the allocation of staff effort. These mandatory work packages are marked by a green arrow over the 'pencil' icon. The information must be broken down according to work packages and details should be provided on the expended staff effort, tasks, objectives achieved as well as possible deviations from the work plan.

With ProjectAngel 7.1.2 (see p. 92), an additional 'Reporting' feature was made available for team leaders (as well as for work package leaders) to help illustrate their work by allowing them to attach up to three files (images, graphs, tables, etc.) to their progress reports. This 'File upload' feature can be found in the sections 'Work progress TL' and 'Work progress WPL', where it is integrated under the entry box marked 'Description of work - details for each task and significant results'.

12.1.2.2. Deliverables and milestones

These tables are read-only and display the deliverables and milestones that are due in the present reporting period as well as those that should have been achieved in previous reporting periods. Team leaders are not required to contribute information about deliverables and milestones.

12.1.2.3. Staff effort

This table is read-only and shows the planned and actual personnel efforts expended for a work package.

12.1.2.4. Dissemination activities

Team leaders are required to provide information about any project dissemination activities carried out or participated in during the reporting period.

12.1.3. Work progress and achievements during the period (WPL)

This section consists of several parts, some of which must be filled out by the work package leaders (WPL) and others which only display information (read-only).

12.1.3.1. Work progress

Work package leaders are required to summarise the work progress for their work package(s). They can base their work progress report on the contributions submitted by the team leaders.

12.1.3.2. Deliverables and milestones

These tables display the deliverables and milestones due in the reporting period as well as those that should have been achieved in previous reporting periods. Only the deliverables and milestones of the work package(s) each WPL is responsible for are shown. WPLs should indicate the actual or foreseen delivery date, if a delay in the work plan has occurred. The deliverable file has to be uploaded in the 'Documents library' by the responsible participant, and then approved by the whole consortium (see chapter 7.3.2, p. 33).

Only the project coordinator is authorised to change the status to 'submitted'. Any other changes to the work plan – if a deliverable has been cancelled or regrouped with another one or if a new deliverable is proposed - should also be commented in the respective column.

12.1.3.3. Staff effort

This table is read-only and shows the planned and actual personnel efforts (as reported by the team leaders) expended for a work package.

12.1.4. Deliverables and milestones tables

Deliverables and milestones tables

Reporting period: 1st Project Periodic Report (01.11.2010 - 31.10.2011)

Instructions - how? +

Instructions - what? +

Del. N°	Deliverable name	W/P N°	Lead participant	Nature	Diss. level	Due delivery date from Annex I	Delivered	Actual/Forecast delivery date	Comments
D01.01	Management guide	W/P01	EURICE	Report	CO	31.01.2011	no		
D01.02.01	Periodic Reports	W/P01	EURICE	Report	CO	31.10.2011	no		
D02.01	State of the art review of the p-medicine environment	W/P02	USAAR	Report	PU	30.06.2011	no		
D02.02	Definition on scenarios and use cases and report on Scenario based user needs and requirements	W/P02	FhG	Report	PU	30.06.2011	no		
D02.03	Specification of the required integration with other research infrastructure initiatives	W/P02	UDUS	Report	PU	31.10.2011	no		
D02.04	Requirements for enhancing VPH models for clinical decision support	W/P02	BIOVISTA	Report	PU	31.10.2011	no		
D02.05	Specification of tools and services supporting patient empowerment	W/P02	ecancer	Report	PU	31.10.2011	no		

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Figure 34 Deliverables and milestones tables

This section offers the project coordinator an overview of all the deliverables and milestones which are due in the present reporting period as well as those that should have been achieved in previous reporting periods. In essence the tables here correspond with 'Table 1. Deliverables' and 'Table 2. Milestones', which are required by the European Commission as part of the 'Project Periodic Report' (Guidance Notes on Project Reporting, Version 06/2010, p. 13-15). These tables are cumulative, so they always show all deliverables or milestones from the beginning of the project.

12.1.5. Project management

This section must be filled out by the project coordinator. It consists of several parts, which cover the management activities carried out during the reporting period. Some parts, however, only display information (read-only).

12.1.5.1. Consortium management

The project coordinator should describe the coordination activities that were carried out during the reporting period in question.

12.1.5.2. Project planning

This section should cover any changes that have occurred in the project work plan during the reporting period. The coordinator can refer to the other sections of the 'Reporting' for further information on the work progress status of the project, as described by the team leaders and work package leaders.

12.1.5.3. Project meetings

This table is read-only and lists all project meetings from the 'Meetings' module that have taken place or are planned during the reporting period in question.

12.1.5.4. Project website

If applicable, the project coordinator should provide some information/updates on the project's website.

12.1.5.5. Dissemination activities

The screenshot shows the 'Project management' section of the ProjectAngel system. The 'Dissemination activities' tab is selected. The reporting period is '1st Project Periodic Report (01.11.2010 - 31.10.2011)'. There are sections for 'Instructions - how?' and 'Instructions - what?'. Below these is a table for 'Use of foreground' with columns: Institution, Exploitable foreground, Exploitable product(s) or measure(s), Sector(s) of application, Timetable, commercial use, Patents or other IPR exploitation (licences), and Owner & Other Beneficiary(s) involved. There is an 'Add' button. Below that is a section for 'A1: List of all scientific (peer reviewed) publications' with a note: 'Before the publications can be uploaded in the EC Participant Portal the coordinator must first gather all necessary information from the participating beneficiaries via the 'Publications' module. Here all scientific publications are compiled into one coherent, cumulative table (xls-file) covering the respective reporting period.' There is a print icon. Below that is a section for 'A2: List of all dissemination activities' with a note: 'This table is required as part of the reporting documentation, but currently this section is not still available in the EC Participant Portal. Therefore, the beneficiaries provide all specific information via the 'Publications' module.' Below this is a table with columns: Institution, Type of activities, Main leader, Title, Date, Place, Type of audience, Size of audience, Countries addressed, and Details/Comments. At the bottom, there is a pagination bar showing 'Page 1 of 1' and 'No data to display'. A 'Back' button is visible in the bottom left corner.

Figure 35 Dissemination activities table

The dissemination activities (events, meetings, publications, use of foreground, etc.) for the reporting period in question and as reported by the different team leaders are listed here. The publications and dissemination activities relevant to the respective reporting period are an exact mirror of those entered in the 'Publications' module. The project coordinator is authorised to carry out any necessary corrections/changes.

12.1.6. Explanation of the use of the resources

In this section the use of the resources, i.e. personnel costs, subcontracting, the purchase of important equipment, travel costs, large consumable items, must be explained and linked to the work carried out in the different work packages. If any project expenditures have been entered in the 'Financial statement - Cost breakdown' (see chapter 12.1.7.1, p. 61), then these numbers will be shown here.

Based on these figures, the team leaders have to explain the use of resources incurred in each work package. The direct linkage between scientific and financial part guarantees a high degree of transparency for the European Commission and avoids potential discrepancies concerning both statements.

The 'print version' button allows the coordinator to download a *.doc-file with the corresponding information.

12.1.6.1. Per beneficiary

This section lists the total sum of each major cost category. Any amendments to the amount, explanation or work package designation can be made here.

The screenshot shows the ProjectAngel interface for 'p-medicine Public ProjectAngel'. The main heading is 'Explanation of the use of the resources'. There are two tabs: 'Per work package' and 'Per beneficiary', with 'Per beneficiary' selected. The reporting period is '1st Project Periodic Report (01.11.2010 - 31.10.2011)'. There are sections for 'Instructions - how?' and 'Instructions - what?'. The beneficiary is set to 'USAAR'. The status is 'Draft'. Below this is a table titled 'Data entered in 'Explanation of the use of the resources' / 'per work package''.

Item description	Amount	Person months	Explanations	Work package(s)
Personnel Costs	0.00	0.00		
Subcontracting	0.00			
Durable Equipment	0.00			
Consumables	0.00			
Travel and Subsistence	0.00			
Other Specific Costs	0.00			
Remaining Costs	0.00			
Total direct costs as claimed on Form C	0.00			

Below the table is a 'Check data' section with a similar table structure, but with edit icons (pencil and trash) in the 'Work package(s)' column for each row.

Figure 36 Explanation of the use of the resources/Per beneficiary

12.1.6.2. Per work package

This page lists the costs incurred for each work package as reported in the 'Cost breakdown'. Any amendments to the amount or explanation can be made here. This page can only be edited if costs were entered in the 'Cost breakdown'.

12.1.6.3. Adjustment

According to Article II.14.1 of the Grant Agreement, any necessary adjustments to claims must be reported in the financial statement for the subsequent reporting period. Consequently all costs must be explained in this section and linked to the work carried out in the work packages. This form becomes available after the first periodic report has been submitted. It allows the beneficiary to make adjustments to any previous Form C (see chapter 12.1.7.9, p. 65).

12.1.7. Financial statement

In this section the specific project expenditures (direct and indirect costs) can be reported and the Form C filled out. To help users – especially financial administrators and/or team leaders – get acquainted with 'FP7 reporting', they should have a look at the respective manuals provided by ProjectAngel under 'Reporting/Support'. This document is also attached as Annex III – Manual 'PA7.1 – Financial reporting in brief' (see p. 102).

The 'print version' button allows the coordinator to download a *.zip-file containing all of the financial details (cost breakdown, spreadsheets of the different cost categories, Form C and adjustments) of each beneficiary.

12.1.7.1. Cost breakdown

The 'Cost breakdown' allows the beneficiaries to detail their project expenditures for the reporting period in question according to personnel, subcontracting, durable equipment, consumables, travel and other specific costs.

The 'print version' button (upper right-hand corner) allows the coordinator to download an *.xls-file containing all of the financial details (cost breakdown, spread sheets of the different cost categories, Form C and adjustments) of the beneficiary selected in the drop-down menu. The financial administrators and/or team leaders only have access to the *.xls-file of their own institution.

12.1.7.2. Personnel costs

The table shows the total personnel costs of an institution as reported in 'Monitoring' (see chapter 10.1.1, Personnel efforts/costs, p. 42ff.). In order to keep salary information confidential, the individual personnel sums are exclusively displayed for financial administrators/team leaders. All other reporters will only be able to see the different persons working on the project and their efforts charged. The corresponding costs, however, are masked with '###'.

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Financial Statement

Cost breakdown |
 Personnel costs |
 Travel and subsistence |
 Durable equipment |
 Consum. |
 Subcontr. |
 Other sp. costs |
 Form C

Reporting period: 1st Project Periodic Report (01.11.2010 - 31.10.2011)

Instructions - how? +

Instructions - what? +

Beneficiary: ▼

Name of person	Title	Staff	Number of person hours	Personnel amount in Euro
			0.00	0.00

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Figure 37 Personnel costs

12.1.7.3. Travel costs

As a general rule, actual travel and related subsistence costs relating to the project may be considered as direct eligible costs, providing they comply with your institution's usual practices and are adequately recorded, like any other cost. If such costs are reimbursed on the basis of a lump sum or per diem payment, it is the lump sum or per diem and not the actual costs that are considered to be eligible costs. Where it is the usual practice of your institution to consider these costs as indirect costs, they cannot be charged as direct eligible costs, but only as indirect costs.

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Financial Statement

Reporting period: 1st Project Periodic Report (01.11.2010 - 31.10.2011)

Instructions - how? +

Instructions - what? +

Beneficiary:

W/P	Major cost item / Remaining costs	Name of person traveling	Purpose of travel	Destination	Date	Amount in Euro
	Major cost item					0.00

Edit record details

WP: ⚠ This field is required

Major cost item / Remaining costs:

Name of person traveling: Register a new personnel resource

Purpose of travel:

Destination:

Date:

Amount in Euro:

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Figure 38 Travel costs

12.1.7.4. Durable equipment

Only equipment purchased for the purposes of carrying out the action can be charged as direct costs. To be considered as eligible, a cost must be determined according to your institution's usual accounting practice and its usual depreciation system for durable equipment. Depreciation is charged in each relevant periodic report. Depreciated costs of equipment can never exceed the purchase price of the equipment.

Depreciation costs for equipment used for the project but bought before the start of the project are eligible under the conditions mentioned in Article II.14.1 of the Grant Agreement. Only the portion of the equipment used on the project may be charged. The amount of use (percentage used and time) must be auditable. Costs for equipment can include all those costs necessary for the asset to be in working condition for its intended use (site preparation, delivery and handling, installation, etc.)

12.1.7.5. Consumables

Any consumables necessary for the implementation of the project may be considered as direct eligible costs. Where it is the usual practice of your institution to consider consumable costs (or some of them) as indirect costs, those costs cannot be charged as direct costs, but as indirect costs. Consumables are only eligible costs under the project if bought after the start date of the project.

12.1.7.6. Subcontracting

Costs for subcontracting (as defined in Article II.7 of the Grant Agreement) are considered direct eligible costs. Any subcontract, the costs of which are to be claimed as an eligible cost, must be awarded according to the principles of best value for money (best price-quality ratio), transparency and equal treatment. Subcontracts concluded on the basis of framework contracts entered into by your institution and a subcontractor, prior to the beginning of the project in accordance with your institution's usual management principles may also be accepted.

12.1.7.7. Other specific costs

Other specific costs must be eligible direct costs which can be attributed directly to the project and cannot be attributed to any of the other categories (personnel, travel, etc). They must be identified by your institution as such, in accordance with its accounting principles and its usual internal rules.

12.1.7.8. Form C

The screenshot shows the 'Form C' reporting interface in ProjectAngel. The main content area is divided into several sections:

- Navigation:** A top bar with 'p-medicine Public ProjectAngel ? Print Logout' and a left sidebar menu with options like 'Communication', 'Coordination', 'Documents library', 'Meetings', 'Monitoring', 'Publications', 'Reporting', 'FP7 reporting', 'Overview', 'Support', 'Service centre', 'Who is who', and 'Work plan'.
- Tabs:** A row of tabs at the top of the main content area: 'Cost breakdown', 'Personnel costs', 'Travel and subsistence', 'Durable equipment', 'Consum.', 'Subcontr.', 'Other sp. costs', and 'Form C' (selected).
- Reporting Period:** '1st Project Periodic Report (01.11.2010 - 31.10.2011)'.
- Instructions:** A section with a '+' icon.
- Status:** 'Beneficiary: USAAR' (dropdown), 'Finalise the 'Form C': Draft' (dropdown).
- Task Table:** A table with columns 'Name', 'on', and 'Status'.

	Name	on	Status
Cost breakdown			<input checked="" type="checkbox"/>
Explanations of the use of the resources			<input checked="" type="checkbox"/>
'Form C' finalised by Financial Reporter			<input checked="" type="checkbox"/>
'Form C' finalised by Coordinator			<input checked="" type="checkbox"/>
- Financial statements — Form C and summary financial report**
 - 1 – Declaration of eligible costs/lump sum/flat-rate/scale of unit (in Euro)**

	RTD (A)	Demonstration (B)	Management (C)	Other (D)	Total (A+B+C+D)	
Personnel Costs	0.00	0.00	0.00	0.00	0.00	<input type="text"/>
Subcontracting	0.00	0.00	0.00	0.00	0.00	<input type="text"/>
Other Direct Costs	0.00	0.00	0.00	0.00	0.00	<input type="text"/>
Indirect Costs	0.00	0.00	0.00	0.00	0.00	<input type="text"/>
Lump sums/flat-rate/scale of unit declared	0.00	0.00	0.00	0.00	0.00	<input type="text"/>
Total	0.00	0.00	0.00	0.00	0.00	
Maximum EC contribution	0.00	0.00	0.00	0.00	0.00	
Requested EC contribution	0.00	0.00	0.00	0.00	0.00	<input type="text"/>
 - 2 – Declaration of receipts**

Did you receive any financial transfers or contributions in kind, free of charge from third parties or did the project generate any income which could be considered a receipt according to Art.II.17 of the grant agreement?: Yes No

If yes, please mention the amount (in Euro):

Figure 39 Form C

Each beneficiary must submit a financial statement (Form C) to the European Commission. The Form C shown here is in part automatically generated based on the cost breakdown (if declared) and can be printed out for submission to the European Commission or used for internal monitoring/documentation purposes.

The 'print version' button (upper right-hand corner) allows the coordinator to download an *.xls-file with the Form C of the beneficiary selected in the drop-down menu. The financial administrators and/or team leaders only have access to the *.xls-file of their own institution.

12.1.7.9. Adjustments

This form becomes available after the first periodic report has been submitted. It allows the beneficiaries to make adjustments to any previous Form C. In this case the beneficiary submits an additional Form C with adjusted figures together with the Form C for the corresponding reporting period. Once the adjustment has been finalised it will be noted in the summary financial report and the cost follow-up table will be updated accordingly (see chapter 12.1.8, **Fehler! Verweisquelle konnte nicht gefunden werden.**, p. 65ff).

The EC Grant Agreement (Article II.14.1) states that any necessary adjustments to claims must be reported in the financial statement for the subsequent reporting period. Therefore the beneficiary must also explain these adjustments in detail (even according to work packages) in the report's section 'Explanation of the use of the resources' (see chapter 12.1.6.3, **Fehler! Verweisquelle konnte nicht gefunden werden.**, p. 61).

The 'print version' button (upper right-hand corner) allows the coordinator to download an Excel file with the adjusted Form C of the beneficiary selected in the drop-down menu. The financial administrators and/or team leaders only have access to the Excel of their institution.

12.1.8. Summary financial report

The new 'Reporting' section is titled 'Summary financial report' (available since 20/04/2010, ProjectAngel 7.1.5), and is listed as the last section in the 'Report directory'. It can only be seen/accessed by the project coordinator and his/her management team. The 'print version' button allows the coordinator to download an *.xls- file with the corresponding information. The 'Summary financial report' has two parts:

12.1.8.1. Summary

Organisator short name	Adjustment	RTD (A)		Demonstration (B)		Management (C)		Other (D)		Total (A+B+C+D)		Status of Form C
		Total	Max EC Contrib.	Total	Max EC Contrib.	Total	Max EC Contrib.	Total	Max EC Contrib.	Total	Max EC Contrib.	
USAAR	no	0	0	0	0	0	0	0	0	0	0	no
EURICE	no	0	0	0	0	0	0	0	0	0	0	no
FORTH	no	0	0	0	0	0	0	0	0	0	0	no
UCL	no	0	0	0	0	0	0	0	0	0	0	no
FhG	no	0	0	0	0	0	0	0	0	0	0	no
LUH	no	0	0	0	0	0	0	0	0	0	0	no
CUSTODIX	no	0	0	0	0	0	0	0	0	0	0	no
Philips	no	0	0	0	0	0	0	0	0	0	0	no
UDUS	no	0	0	0	0	0	0	0	0	0	0	no
ICCS	no	0	0	0	0	0	0	0	0	0	0	no
UPM	no	0	0	0	0	0	0	0	0	0	0	no
CAU	no	0	0	0	0	0	0	0	0	0	0	no
IEO	no	0	0	0	0	0	0	0	0	0	0	no
ecancer	no	0	0	0	0	0	0	0	0	0	0	no
UOXF	no	0	0	0	0	0	0	0	0	0	0	no
BIOVISTA	no	0	0	0	0	0	0	0	0	0	0	no
SIB	no	0	0	0	0	0	0	0	0	0	0	no
UHKok	no	0	0	0	0	0	0	0	0	0	0	no
IBM Israel	no	0	0	0	0	0	0	0	0	0	0	no

Figure 40 Summary financial report

The summary financial report consolidates the claimed Community contribution of all the beneficiaries in an aggregate table, based on the information provided in Form C by each beneficiary. It allows the coordinator to do a final check on all the numbers reported by the consortium before forwarding the information to the European Commission.

And once the coordinator has finalised the summary financial report (change status) then these numbers will serve as the calculation basis for the remainder of the project. Not all columns of the summary financial report table are displayed in the front end, because there is not enough space. The print version, however, does show all the information as requested by the European Commission as Annex IV. It is very important, that this summary financial report truly reflects the final document provided to the European Commission via the EC Participant Portal/FP7 Project Reporting Tool, since otherwise the numbers in the cost follow-up will not be reliable (see 12.2.1, p. 71).

12.1.8.2. Cost follow-up

This table displays the planned budget, the actual costs incurred in each reporting period and the remaining amount. It provides an exact picture of the budget's current status, and enables the coordinator to monitor its progress as well as take any corrective actions if necessary. This information should also prove helpful with the management part (project planning and status) of the 'Periodic Report' (see also chapter 12.1.5, p. 58).

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Summary financial report

Summary **Cost follow-up** Payments

Reporting period: 1st Project Periodic Report (01.11.2010 - 31.10.2011)

Instructions - how? +
Instructions - what? +

Cost follow-up per beneficiary

Beneficiary:

	Budget	Actual PM 1-12	Actual PM 13-24	Actual PM 25-36	Actual PM 37-48	Actual Total	% spent	Remaining budget
Personnel Costs	955,000.00	0.00	0.00	0.00	0.00	0.00	0.00	955,000.00
Subcontracting	6,000.00	0.00	0.00	0.00	0.00	0.00	0.00	6,000.00
Other Direct Costs	162,100.00	0.00	0.00	0.00	0.00	0.00	0.00	162,100.00
Indirect Costs	670,260.00	0.00	0.00	0.00	0.00	0.00	0.00	670,260.00
Total	1,793,360.00	0.00	0.00	0.00	0.00	0.00	0.00	1,793,360.00

Project cost follow-up

	Budget	Actual PM 1-12	Actual PM 13-24	Actual PM 25-36	Actual PM 37-48	Actual Total	% spent	Remaining budget
Personnel Costs	9,991,002.00	0.00	0.00	0.00	0.00	0.00	0.00	9,991,002.00
Subcontracting	100,000.00	0.00	0.00	0.00	0.00	0.00	0.00	100,000.00
Other Direct Costs	1,345,854.00	0.00	0.00	0.00	0.00	0.00	0.00	1,345,854.00
Indirect Costs	7,044,549.00	0.00	0.00	0.00	0.00	0.00	0.00	7,044,549.00
Total	18,481,405.00	0.00	0.00	0.00	0.00	0.00	0.00	18,481,405.00

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Figure 41 Cost follow-up

12.1.8.3. Payments

According to the EC Grant Agreement (Annex II.2.3) the coordinator is in charge of administering the Community financial contribution and allocating the corresponding amounts to the beneficiaries. Furthermore, the coordinator should be able to determine at any time what portion of the contribution has been paid to each beneficiary for the purposes of the project, as well as provide the European Commission on a regular basis or on demand with information on the distribution of the Community financial contribution including the date of transfers to the beneficiaries.

This feature is also available in the 'Coordination' module (see chapter 6.2.2.3, p. 26) where the information in question can be entered for the entire project duration. Here in 'Reporting' it helps the coordinator record the payment activities for the corresponding reporting period, and via the 'Print version' feature create an *.xls-file that can be used for the management/financial part of the periodic report, since the table displays the payment information for the entire project and not only for the undergoing reporting period (see chapter 12.1.6, p. 60).

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Summary Cost follow-up **Payments**

Reporting period: 1st Project Periodic Report (01.11.2010 - 31.10.2011)

Instructions - how? +
Instructions - what? +

Payment: 1st payment/pre-financing

Pre-financing/Interim payments of the Community financial contribution to the coordinator

Date of payment by the European Commission: CS
 Amount in Euro:

Distribution of the pre-financing/Interim payments of the Community financial contribution to the beneficiaries

Beneficiary number	Beneficiary short name	Maximum EC contribution	% of maximum EC contribution	Date of payment to the beneficiaries	Amount in Euro	Remaining EC contribution	
01	USAAR	1,446,160.00	10.85			1,446,160.00	
02	EURICE	653,138.00	4.90			653,138.00	
03	FORTH	967,674.00	7.26			967,674.00	
04	UCL	1,051,323.00	7.89			1,051,323.00	
05	FhG	1,530,712.00	11.48			1,530,712.00	
06	LUH	582,851.00	4.37			582,851.00	
07	CUSTODIX	607,075.00	4.55			607,075.00	
08	Phillips	887,920.00	6.66			887,920.00	
09	UDUS	526,311.00	3.95			526,311.00	
10	ICCS	674,200.00	5.06			674,200.00	
11	UPM	506,790.00	3.80			506,790.00	
12	CAU	340,000.00	2.55			340,000.00	
13	IEO	430,118.00	3.23			430,118.00	
14	ecancer	858,480.00	6.44			858,480.00	
15	UOXF	574,380.00	4.31			574,380.00	
16	BIOVISTA	393,001.00	2.95			393,001.00	

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Figure 42 Payments

12.1.9. Deadline settings & checklists

This section is restricted to the project coordinator and his management team. It allows the coordinator to check the status of the TL and WPL progress reports, and if necessary, send out individual reminders. The submission deadlines can also be set or changed here.

12.1.9.1. Check TL progress reports

Here the coordinator can view the scientific reports written on institutional level according to work packages. Depending on the institution selected from the drop-down menu, the coordinator can see at a glance if, when, and by whom a report has been written, as well as verify its current status (draft, preliminary, final). Should contributions be delayed or missing, the coordinator can use the 'Send reminder'-feature to notify the corresponding team leader.

He/she can select the addressees from a drop-down menu which lists all the people from the institution who have access to 'Reporting', set a deadline, and write a message. The text displayed in the entry box is a suggestion that can be adopted, adjusted or rewritten. The e-mail subject text is pre-defined and cannot be changed. After sending the message via ProjectAngel, the coordinator will also receive a copy of the e-mail reminder for their documentation.

12.1.9.2. Check WPL progress reports

Deadline settings & checklists

Check TL progress reports | **Check WPL progress reports** | Check staff effort | Deadlines | Upload template

Reporting period: 1st Project Periodic Report (01.11.2010 - 31.10.2011)

Instructions - how? +

Instructions - what? +

	WP N°	WP title	Type of activity	Lead part. N°	Lead part. short name	Start month	End month	Last saved on	Last saved by	Status
	WP01	Project Management	Management	02	EURICE	1	48			n/a
	WP02	User needs and requirements	RTD	01	USAAR	1	36			n/a
	WP03	IT Architecture	RTD	03	FORTH	3	42			n/a
	WP04	Standardisation, Semantic interoperability and data integration	RTD	11	UPM	1	48			n/a
	WP05	Legal and Ethical framework								
	WP06	Integration in clinical research infrastructures								
	WP07	Data warehouse								
	WP08	p-medicine workbench								
	WP09	Clinical trials								
	WP10	Access to Biobanks								
	WP11	Patterns for Data mining and Predictive Analytics								
	WP12	VPH modelling and the integrated Oncosimulator								
	WP13	Clinical Decision Support								
	WP14	Collaborative Environment for Patient								

Send reminder

To: [Dropdown]

WP: WP01

Deadline: 30.12.2011

Subject: p-medicine Reminder / Reporting 1st Project Periodic Report

Message:

Dear p-medicine partner(s),
please finalise your WPL work progress for WP01.
Regards,
Helpdesk !ProjectAngel

Preview Cancel

Figure 43 Send reminder-feature to notify the corresponding work package leader

Here the coordinator can view the reports written for each work package. The table clearly shows if, when, and by whom a report has been written, as well as the reports current status (draft, preliminary, final). Should contributions be delayed or missing, the coordinator can use the 'Send reminder'-feature to notify the corresponding work package leader.

He/she can select the addressees from a drop-down menu which lists all the people from the institution who have access to 'Reporting', set a deadline, and write a message. The text displayed in the entry box is a suggestion that can be adopted, adjusted or rewritten. The e-mail subject text is pre-defined and cannot be changed. After sending the message via ProjectAngel, the coordinator will also receive a copy of the e-mail reminder for his/her documentation.

12.1.9.3. Check staff effort

Figure 44 Check staff efforts table

Available since 08/04/2010, ProjectAngel 7.1.4 (see p. 91) provides the new 'Check staff efforts'-feature for coordinators and members of their management office. According to each corresponding reporting period these tables show the planned and actual personnel effort spent by the institutions in each work package, as well as the total efforts spent for the project. Additionally, these numbers are compared to the personnel effort that is foreseen in the work plan for the full project duration. Differences between the numbers reported in 'Monitoring' and those reported by the team leader in 'Reporting' are highlighted.

The coordinator should use these tables to check the numbers the consortium has reported, either in 'Reporting' and/or in 'Monitoring', and identify at a glance possible discrepancies in the partners' entries. Differences between planned, actual and foreseen efforts are also easily detected here. In addition, to helping the coordinator with the management part (project planning and status) of the 'Periodic Report', this information allows them to take corrective actions if necessary.

12.1.9.4. Deadlines

The coordinator can define different deadlines for each section of the online reporting procedure. This important information is displayed right at the beginning of the online reporting process in the 'Reporting directory' (see p. 54).

12.2. Overview

Official financial and technical activity reports are mandatory documents that have to be submitted in a given reporting schedule. These reports are very comprehensive, providing a detailed expenditure plan. This requires exact coordination and cooperation in the consortium as well as with third parties.

Periodic Project Reports

- PR-1/ Reporting Period from month 01 to month 12
- PR-2/ Reporting Period from month 13 to month 24
- PR-3/ Reporting Period from month 25 to month 36
- PR-4/ Reporting Period from month 37 to month 48
- Final Report/Reporting Period from month 1 to month 48

In addition to these official periodic reports, the p-medicine consortium may also produce Internal Reports.

Interim Project Reports

tbd

All the submitted reporting documents are listed in the 'Reporting/Overview' and accessible according to the respective reporting period.

12.2.1. EC Participant Portal/FP7 Project Reporting Tool

The consortium submits the reports and other deliverables via the coordinator to the European Commission. In addition, they must submit a Form C, which must be signed by the authorised person(s) within the beneficiary's organisation and the certificates on the financial statements as well as on the methodology, which must be signed by an authorised person of the auditing entity. Generally the beneficiaries send the original documents to the coordinator who then forwards everything to the European Commission.

To formally submit the report and its attachments to the European Commission, the coordinator must use the EC Participant Portal⁹ - SESAM, since only files submitted through this channel are considered valid and treated by the European Commission; versions sent in parallel by other channels are ignored. Reports and their corresponding attachments received by the European Commission via the EC Participant Portal are filed and registered as a formally received communication from the consortium before being processed. The submitted report appears in the EC Participant Portal list of 'Submitted Reports' and the consortium may not modify it any more (unless the Commission project officer rejects the report and reopens it for editing).

Before the final report can be uploaded in the EC Participant Portal the coordinator must first gather the necessary information from the participating beneficiaries. The individual work progress reports have to be compiled into one coherent document; the financial data has to be checked and prepared in tables - all in line with the requirements of the European Commission. ProjectAngel 'FP7 Reporting' supports the coordinator with this work by facilitating the collection of report data in a clearly structured manner according to the different sections and tables of the EC's Guidance Notes on Project Reporting.

It allows the coordinator to see who has contributed what, thus giving a clear picture on the available data for the report, or more importantly the information still missing from it. And it also manages the formatting of the

⁹ http://ec.europa.eu/research/participants/portal/appmanager/participants/portal?_nfpb=true&_pageLabel=home

individual contributions, so that the coordinator can concentrate on the content to make sure that it is complete and correct. Once this has been done, 'FP7 Reporting' delivers the finalised core report (the 'narrative part' in a *.pdf document) and all other additional documents so that they can be uploaded in the EC Participant Portal.

12.2.2. Period 1

The screenshot shows the ProjectAngel web interface. At the top, there is a navigation bar with 'p-medicine', 'Public', 'ProjectAngel', and a help icon. On the right of the bar are 'Print' and 'Logout' links. A left-hand navigation menu lists various categories: Communication, Coordination, Documents library, Meetings, Monitoring, Publications, Reporting (highlighted), FP7 reporting, Overview (highlighted), PR-1, Support, Service centre, Who is who, and Work plan. The main content area is titled 'Period 1/Reporting period: 01/02/2011 - 31/01/2012'. Below the title, there are links for 'Overview', 'Monitor PR-1', 'TL reports', 'WPL reports', and 'Financial reports'. A 'New Entry' button is present. Below it is a table header with columns: 'N°', 'Title', 'Author', and 'Last saved on'. A message indicates 'Archive/Deleted Items (0 item(s))'. A 'Back' link is located at the bottom left of the page.

Figure 45 TL report overview/9PR1

For the projects managed by DG RTD and DG ENTR and the Research Executive Agency (REA) the scientific-technical parts will be submitted only via the specific EC Participant Portal (so-called SESAM). The financial reports will be submitted via the EC Participant Portal through Forms C but paper versions signed by the authorised person have still to be sent by regular mail.

Each final version of the periodic project report, i.e. team leader reports, work package leader reports, and financial reports, will be stored in the form of one single document in electronic format (*.pdf-format) and include a scanned copy of the signed pages. In addition, the compilation of all these documents – which is based on and in line with the Guidance Notes on Project Reporting (Version June 2010) – is circulated as a 'master document' in the respective reporting folder (see 'Monitor PR-1') and its final version will be stored additionally in the 'Documents library' module (under 'EC & Management reports', p. 35).

12.3. Support

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Support

The 'FP7 reporting' module allows you to compile your Project Periodic Report, according to the EC Guidance Notes on Project Reporting. To help you get acquainted with 'FP7 reporting', please have a look at the following manuals:

N°	Title	Last saved on
Archive/Deleted Items (0 item(s))		

Technical support

If you have further questions about the online 'FP7 reporting' procedure please contact the **ProjectAngel Team** and we will be happy to assist you. Our agents are available Monday - Friday, 08.00 - 18.00 (CET).

**ProjectAngel Contact**
Nina Michaltzik
Fon: +49 681-95 92 33 74
Fax: +49 681-95 92 33 70
E-mail: projectangel@p-medicine.eu

Questions regarding the content of your report should, however, be addressed to your **project (administrative) coordinator**.

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Figure 46 Reporting support

ProjectAngel provides technical support concerning any question about the online 'FP7 reporting' procedure. All reporters will find detailed contact data (e-mail, phone and fax) as well as a series of supporting manuals. If you are unable to find the answers to your questions neither in these reporting-specific manuals nor in the ProjectAngel Helpdesk, please contact the ProjectAngel Team and we will be happy to assist you.

Your problems will be solved faster and more efficiently if you formulate your questions as precisely as possible. Please indicate the following items in detail: The ProjectAngel module in which you encountered problems, and the procedure you were trying to carry out (e.g. upload a document, register for an event, etc.). Our agents are available Monday - Friday, 08.00 - 18.00 (CET).

Questions regarding the content of the different reporting parts, however, should be addressed to the scientific and/or administrative coordinator. To facilitate the contacting, ProjectAngel offers here a direct contact e-mail-account (coordination@p-medicine.eu).

13. Service centre

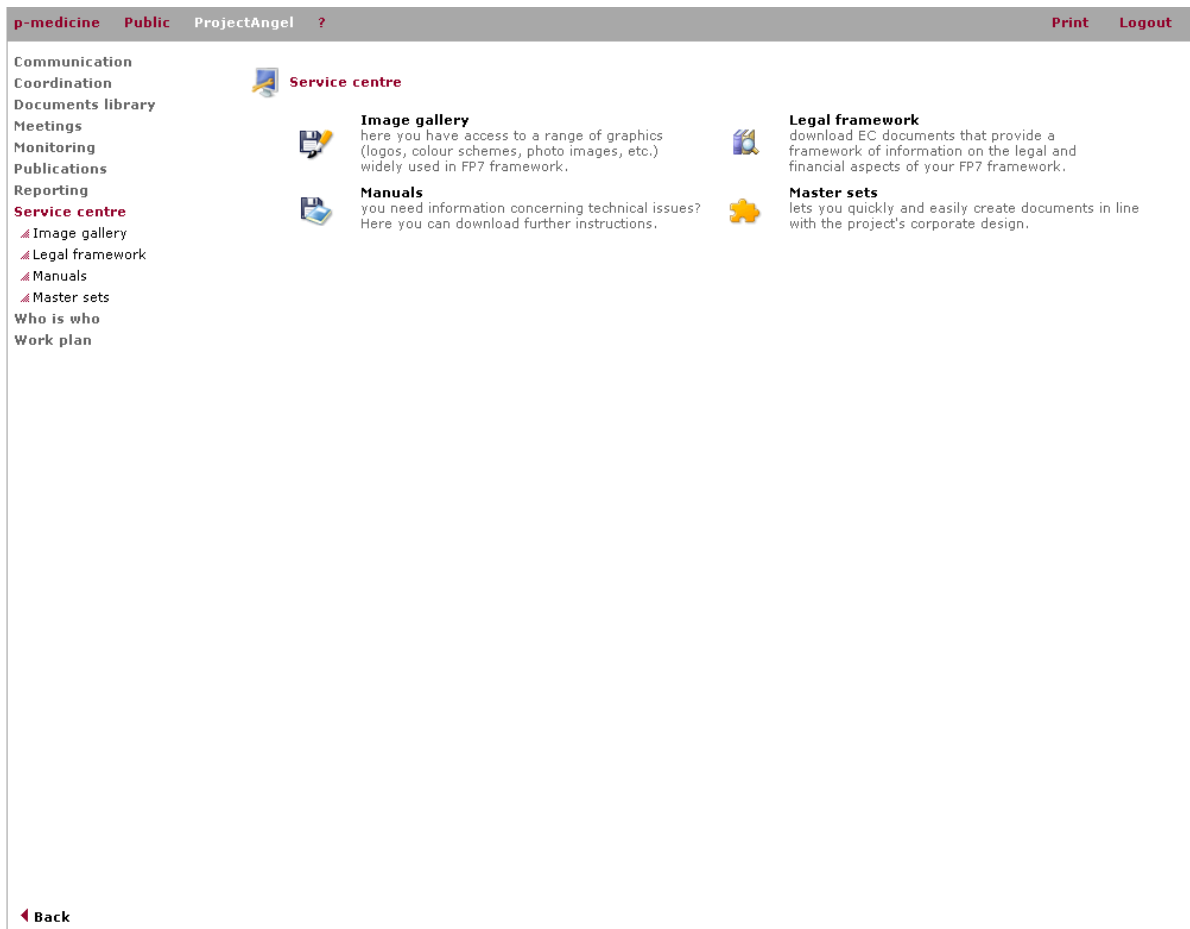


Figure 47 Service Centre

The coordinator and his/her Project Management Team can upload and edit documents in the various 'Service Centre' categories. Other members of the consortium cannot see the 'Edit'-button since they are not authorised to carry out this measure. A news bulletin entry is automatically generated in 'Document Tracking' and the consortium is notified about the upload.

13.1. Image gallery

Under 'Image gallery' the user has access to a range of graphics (logos, colour schemes, photo images, etc.) that are widely used in the EU-framework as well as in his/her particular European project. These graphics enliven publications, presentations, and advertising materials. They also help to create a standardised project image. ProjectAngel mainly uses the graphic data formats *.gif (Graphic Interchange Format) and *.jpg (Joint Photographic Experts Group). Both formats are widespread, since they offer smaller data files that can be downloaded in little time and both are standard formats that can be opened by any programme that supports that standard format.

In part the graphic data formats *.cdr (CorelDraw vector image) and *.eps (Encapsulated Post Script) are also provided. EPS is a standard format for importing and exporting PostScript language files in all environments. The purpose of the EPS file is to be included as an illustration in other PostScript language page descriptions.

13.2. Legal framework

A framework of information on the legal and financial aspects of the FP7 project is available in the 'Service Centre'. This section offers details, as they become available, of the various issues and positions emerging from the European Commission in relation to the adoption of the current framework programme. In this section the user can download relevant references for an applicable legal framework as well as view suggestions for good financial practices that can be implemented when carrying out an EC-funded RTD project.

13.3. Manuals

Should the user need any technical assistance, the 'Manuals' section offers helpful information about system procedures and instructions. Manuals are dated and conveniently listed by title/topic to enable quick information retrieval.

13.4. Master sets

'Master sets' consist of a series of different document templates that are based on a uniform layout. They allow the user to quickly and easily create documents, from project reports to dissemination and advertising materials, with a professional appearance in line with the corporate design of the project.

Templates may be available in different file formats to guarantee cross-platform usability (e.g. *.pdf, *.doc or *.xls). Opting for an MS-Word template will let the user profit from the predefined style sheets to streamline a document's layout.

Project-specific templates bear user-friendly titles in order to help the user to quickly identify the necessary document. Currently, master sets for the following document categories are available: deliverables, timesheets, meeting minutes.

14. Who is who

14.1. Address registers

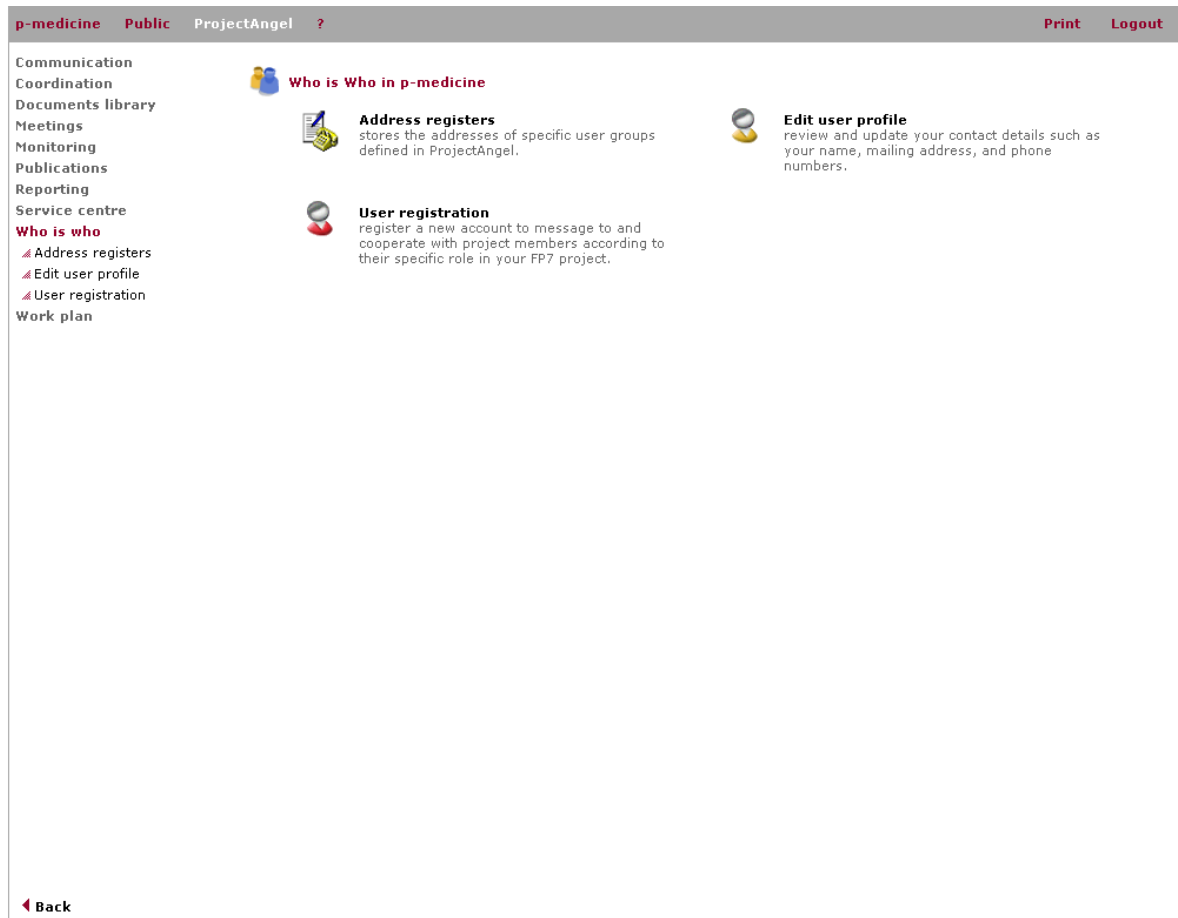


Figure 48 Address registers

Currently the 'Who is who' presents the ProjectAngel users in four different address registers:

- Administrators;
- Consortium ;
- Management office;
- Reviewers.

In the different address registers the user finds a list of all members involved in the project. Its presentation can be organised by alphabetical or institutional order.

14.2. Edit user profile

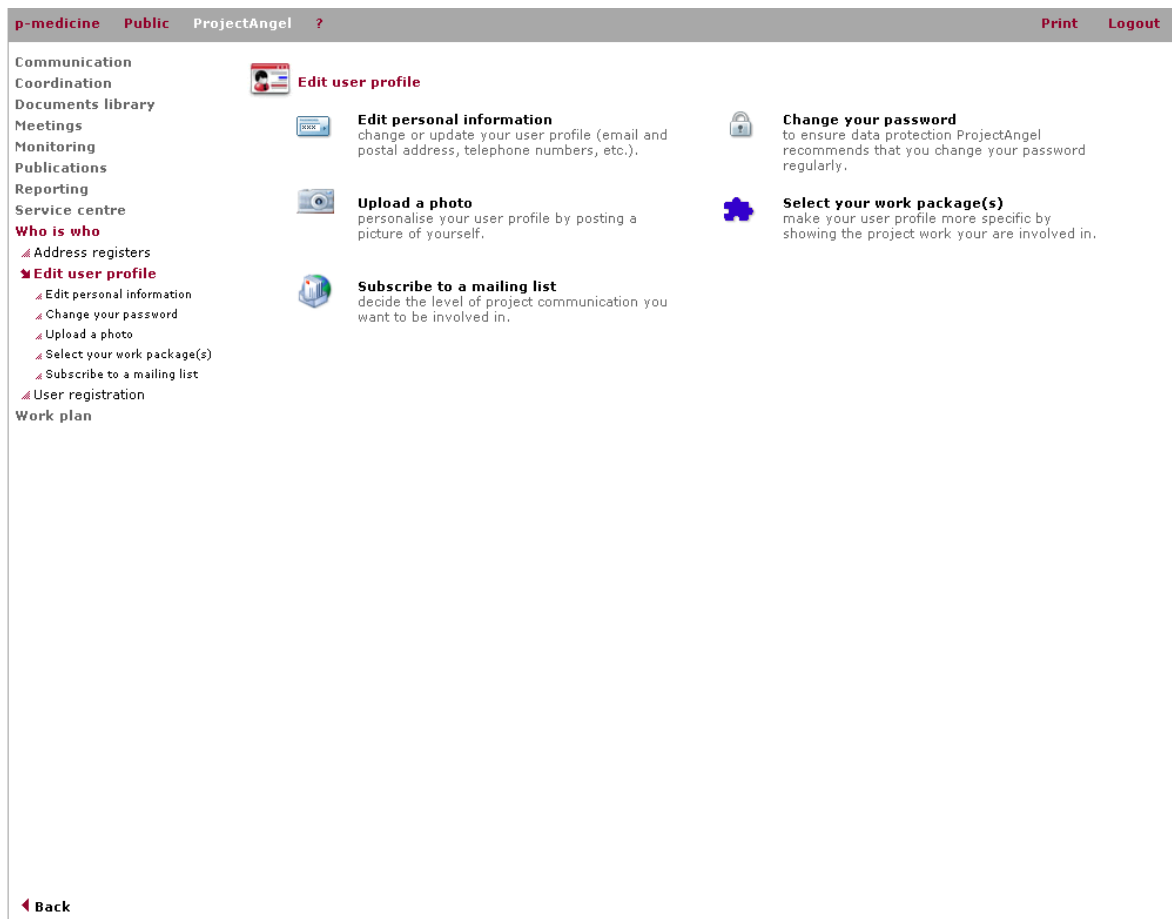


Figure 49 Edit user profile

In ProjectAngel for each project member has/will be set up a user account. Initially, each user is sent a user name and password that must be used to log into the platform.

The first time a user logs in he/she will have the opportunity to check and complete his/her contact data as well as change his/her password (this is strongly recommended). This information can also be edited at a later point in time via the 'Who is who' module. Here users can find all details concerning their individual user profile. These can be edited; only name and e-mail address are mandatory, all other information (address, phone or fax number, etc.) is optional.

To keep personal data secure, a password that cannot be easily discovered or guessed by others is highly recommended. ProjectAngel users should regard the following guidelines to develop a password that can be used securely as well as be easily remembered:

- Do not use your username.
- Do not use a single dictionary word.
- Make sure the password can be easily remembered (something meaningful, for example).
- Choose a password with at least five (5) characters.
- A combination of alphabet characters, numbers, and special characters (such as !@#%&*) is recommended for higher security.

- Passwords will be case-sensitive. Capital and lowercase letters can therefore also be used for higher security.
- If the password is written down, it should be kept in a secure location.

Finally, users can upload a picture of themselves with their user profile. The file should be in either in *.jpg/*.jpeg or *.gif format. A good-quality portrait picture is recommended (e.g. passport photo), however the file size should not exceed 1 MB. For adequate sizing, the height/width ratio should be approximately 3:2. Large pictures will automatically be scaled down.

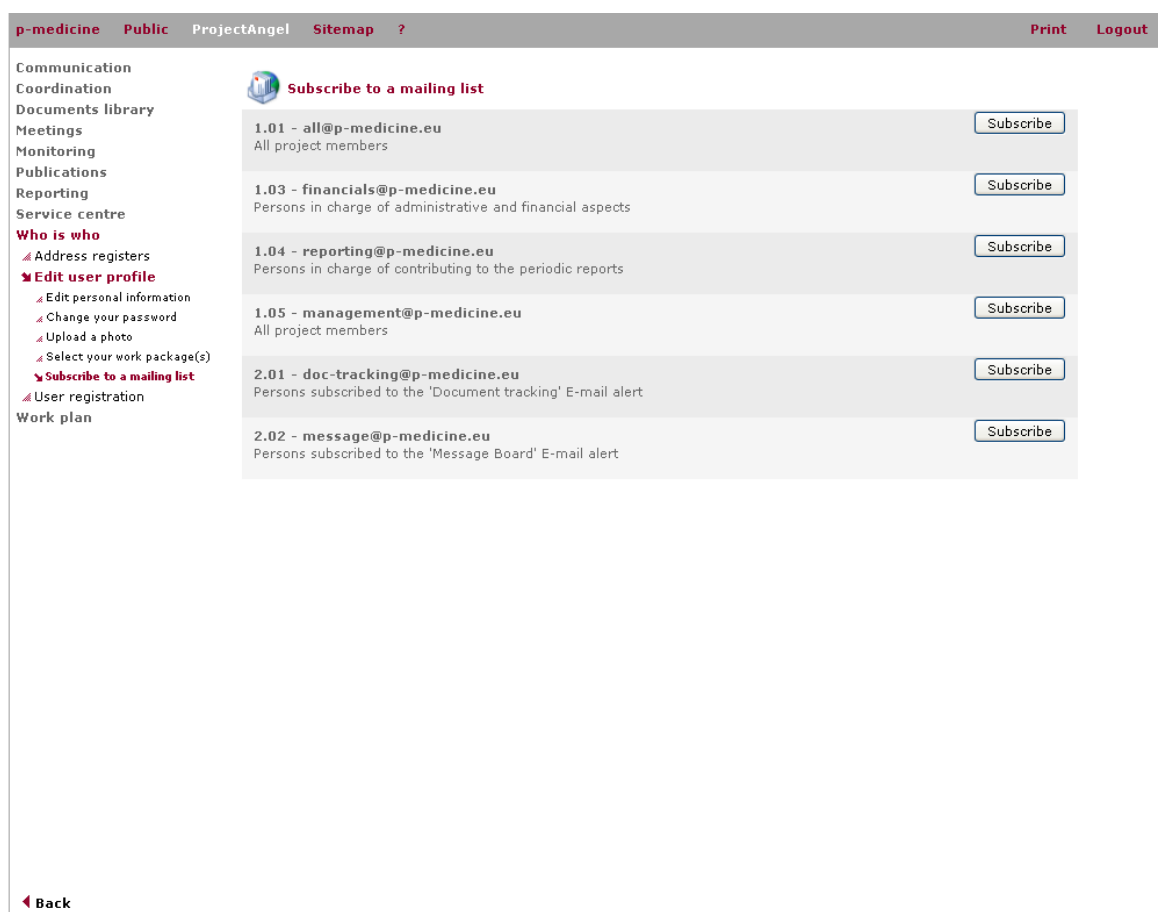


Figure 50 Mailing list subscription

Here partners can look up the various mailing lists and the respective addressees that have been set-up for the project communication. Users can send an e-mail to the mailing list by clicking on its title. It is directly linked to their personal e-mail processing programme (e.g. MS-Outlook). For convenience, the corresponding e-mail address will automatically appear in the recipient heading.

14.3. User registration

14.3.1. Team member registration

Here the coordinator as well as the team leader will find an online form which allows him/her to register new or additional persons as project team members. According to the established 'Access system' (see also chapter 5, p. 19) team members will be given access to the respective project documents.

14.3.2. PMO registration

Here the coordinator will find an online form which allows him/her to register new or additional persons as members of the Project Management Team. According to the established 'Access system' they will be given comprehensive access to all ProjectAngel modules. The involvement of a PMO was considered necessary to reduce the administrative and organisation burden for the scientific coordinator and the beneficiaries.

14.3.3. Reviewer registration

Here the coordinator will find an online form which allows him/her to register new or additional persons as official project reviewer. According to the established 'Access system' official reviewers will be given access to the respective project documents.

14.3.4. Team member registration

p-medicine Public ProjectAngel ? Print Logout

Team member registration

Please fill in the information for the account of the invited person:

Preferred username: *

Password (lowercase): * Repeat:

First name: *

Last name: *

Institution: *

Email: *

*Notice: Fields with * must be filled in!*

Notice for the coordinator:
Team members have limited access.

They will be assigned these access keys/user roles:
 Guest, Member

They will be displayed in the following address registers:
Consortium

They will automatically be subscribed to the mailing lists*:

- all@p-medicine.eu
- doc-tracking@p-medicine.eu
- message@p-medicine.eu
- publications@p-medicine.eu

TEST: Login as a project member with 'Team member' status
login: test-member2011
password: test-member2011

* According to the project-specific settings users will be authorised to unsubscribe themselves from some of the above-mentioned mailing lists.

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Figure 51 Team member registration

15. Work plan

The screenshot shows the 'Work plan' overview page in ProjectAngel. The page is titled 'Work plan' and features a navigation menu on the left with the following items: Communication, Coordination, Documents library, Meetings, Monitoring, Publications, Reporting, Service centre, Who is who, and Work plan. The 'Work plan' section is expanded, showing a list of 17 work packages (WP1-WP17) arranged in two columns. Each work package is represented by a colorful puzzle piece icon and a brief description. Below the work packages, there are three sections: 'Deliverables list' (with a calendar icon), 'WP station' (with a puzzle piece icon), and 'Next actions' (with a calendar icon). The top navigation bar includes 'p-medicine', 'Public', 'ProjectAngel', and 'Print Logout'.

Figure 52 Work plan/Overview

The activities undertaken in the p-medicine project are broken down into work packages and tasks. The EC Grant Agreement, Annex I, includes a detailed work plan that is broken down into separate work packages, which follow the logical phases of the project implementation.

15.1. WP station

European projects comprises of separate work packages or actions, each one either related to one or several of the stated objectives or to the project management and dissemination of the project results. Accordingly the work plan is illustrated with the help of five detailed tables:

- Table 1.3a – Work Package List
- Table 1.3b – Deliverables List
- Table 1.3c – Description and Summary of each Work Package/Action
- Table 1.3d – Summary Effort Table
- Table 1.3e – List of Milestones

p-medicine Public ProjectAngel ? Print Logout

[Institutions](#)
[WP list](#)
[WP description](#)
[Deliverables](#)
[Staff effort](#)
[Milestones](#)
[Status quo](#)

Communication
 Coordination
 Documents library
 Meetings
 Monitoring
 Publications
 Reporting
 Service centre
 Who is who
Work plan
 ▲ WP01
 ▲ WP02
 ▲ WP03
 ▲ WP04
 ▲ WP05
 ▲ WP06
 ▲ WP07
 ▲ WP08
 ▲ WP09
 ▲ WP10
 ▲ WP11
 ▲ WP12
 ▲ WP13
 ▲ WP14
 ▲ WP15
 ▲ WP16
 ▲ WP17
 ▲ Deliverables list
 ▲ Next actions
 ▼ **WP station**
 ◀ Back

Instructions

Work package: WP01
 Work package title: Project Management
 Start date or starting event: 1
 Activity type: Management

Person-months per participant

Participant N°	Participant short name	Person-months per participant
01	USAAR	12.00
02	EURICE	38.00
03	FORTH	5.00
04	UCL	0.00
05	FhG	0.00
06	LUH	0.00
07	CUSTODIX	0.00
08	Philips	0.00
09	UIDUS	0.00
10	ICCS	0.00
11	UPM	0.00
12	CAU	0.00
13	IEO	0.00
14	ecancer	0.00
15	UOXF	0.00
16	BIOVISTA	0.00
17	SIB	0.00
18	UHok	0.00
19	IBM Israel	0.00
20	PSNC	0.00

Figure 53 WP station

15.1.1. WP list

An essential step in structuring a project work plan is to break down and/or group the project's activities into work packages/actions. Each action is designated with a number and assigned to one of the beneficiaries who will oversee and coordinate the corresponding work as a work package leader.

A work package's duration is limited, so a start and end date must also be defined. This information is entered and displayed in the 'WP List' together with the total effort in person months allocated to each work package. The information regarding the leading beneficiary's short name and the number of person months is taken automatically from the corresponding WP description (see below, chapter 15.1.2).

15.1.2. Work package description

Each work package item provides information about the work package leader, i.e. the institution / functional department responsible for integrating the work of individual contributors to each of their assigned actions and corresponding deliverables. Furthermore, the duration of the action is defined according to Project Months – PM 1 being the month the project was officially scheduled to begin.

Each work package overview displays the 'Objectives of work', 'Description of the tasks', 'Deliverables' as well as 'Milestones and expected results' for the respective period.

15.1.3. Deliverables

The description of the work package includes a description of the deliverables that will be achieved in the work package. On a sub page of the specific action/work package appears a list with the corresponding deliverables. Furthermore, all information provided here concerning the action-specific deliverables is compiled into the 'Deliverables List' that displays an overview concerning the deliverable number, name, related work package, its nature and dissemination level as well as the delivery date. By clicking on the table's title the user will thus be forwarded to the overview of deliverables in the 'Deliverables/In progress' of the 'Documents library' module.

15.1.4. Staff effort

Here all the efforts invested by each beneficiary for each work package/action are displayed in person-months, and finally calculated as a person month total per beneficiary.

15.1.5. Milestones

The EC Grant Agreement has to include a list of the milestones that will be achieved in each work package and the project as a whole. The information submitted here concerning the individual milestones is compiled into one table, the 'Milestone List'.

15.2. Work packages and Shared documents

To facilitate the work package-specific document exchange, the 'Work plan' module provides detailed information to each work package and an additional 'Shared documents'-repository.

This feature is intended as an exchange platform for working documents; project partners can upload and exchange working documents concerning the various actions. For a better overview users can sort the documents according to title, author, and date by clicking on the respective title in the table. Documents that should be uploaded to the platform are not restricted in size. However, users may encounter problems, as some firewalls or browsers may restrict the file size of uploaded documents.

15.3. Deliverables list

The 'Deliverables' directory lists all deliverable files that have been submitted by the project management office/coordinator and that have been accepted by the European Commission. The user can sort these deliverables according to their corresponding number, their delivery date, the leading beneficiary or the deliverable status. Furthermore, partners can download the files having access to reliable finalised document versions (see also chapter 7.3 Documents library, p. 33).

15.4. Next actions

As already described above, the 'Next actions' enables ProjectAngel users – especially the coordinator – to plan, monitor and present the necessary next steps in the different work packages. Therefore this feature is mirrored into the 'Work plan' module, to guarantee the users quick access while reflecting the current work plan progress. The 'Next actions'-list marks the tasks themselves, the tasks' deadlines, and persons responsible for carrying out these tasks (see also chapter 10.2 Next actions, p. 44).

16. ProjectAngel Helpdesk

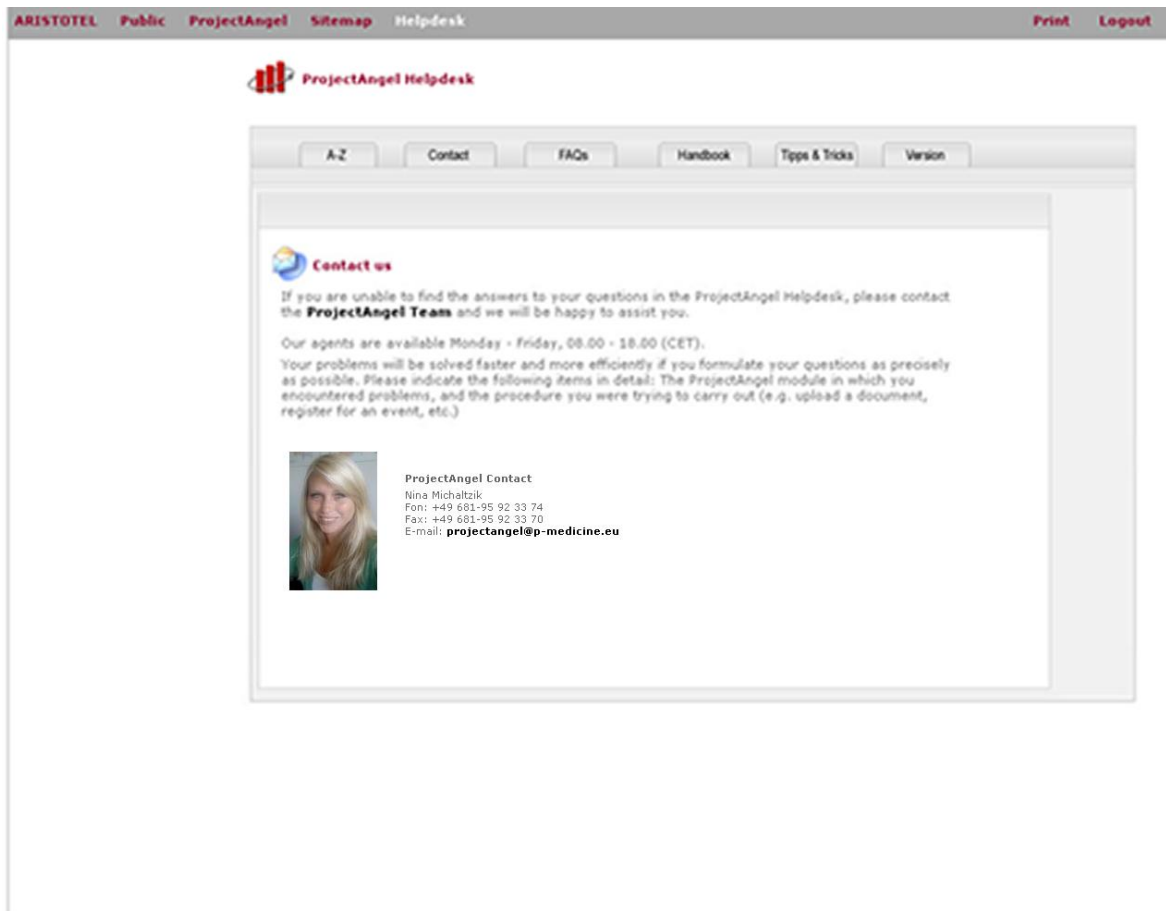


Figure 54 'Helpdesk'– Contact us

In the ProjectAngel Helpdesk you will find all the explanations and answers to questions that might arise while working with ProjectAngel. The helpdesk has been subdivided as follows:

- A-Z
- Contact
- FAQs
- Handbook
- Tips & Tricks

Any of these helpdesk features will open in an external window so you can comfortably use them while at the same time working with ProjectAngel.

16.1. A-Z

The A-Z section lists important EC and project management terms in alphabetical order.

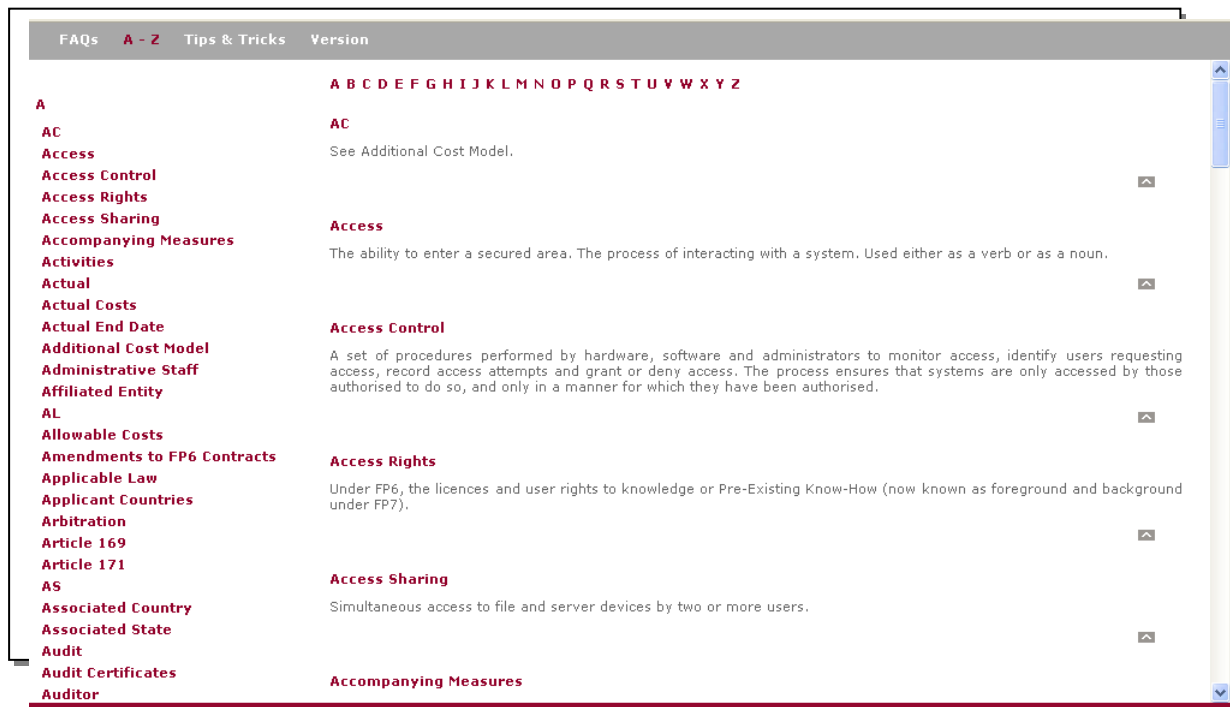


Figure 55 A-Z – Overview

16.2. FAQs

The FAQ section lists a series of Frequently Asksed Questions and answers for each ProjectAngel module. It's an easy way to quickly find information on the 'how to's' of ProjectAngel.

16.3. Handbook

The Handbook explains every ProjectAngel module and its features and functionalities in great detail making it the prime source for anything you might like to know about working with ProjectAngel. The Handbook follows a similar navigation structure as ProjectAngel using the same overview pages for each module.

16.4. Tips & Tricks

This section offers useful tips and tricks in dealing with various web browsers and MS Office programmes which could facilitate your daily project work.

17. Sitemap

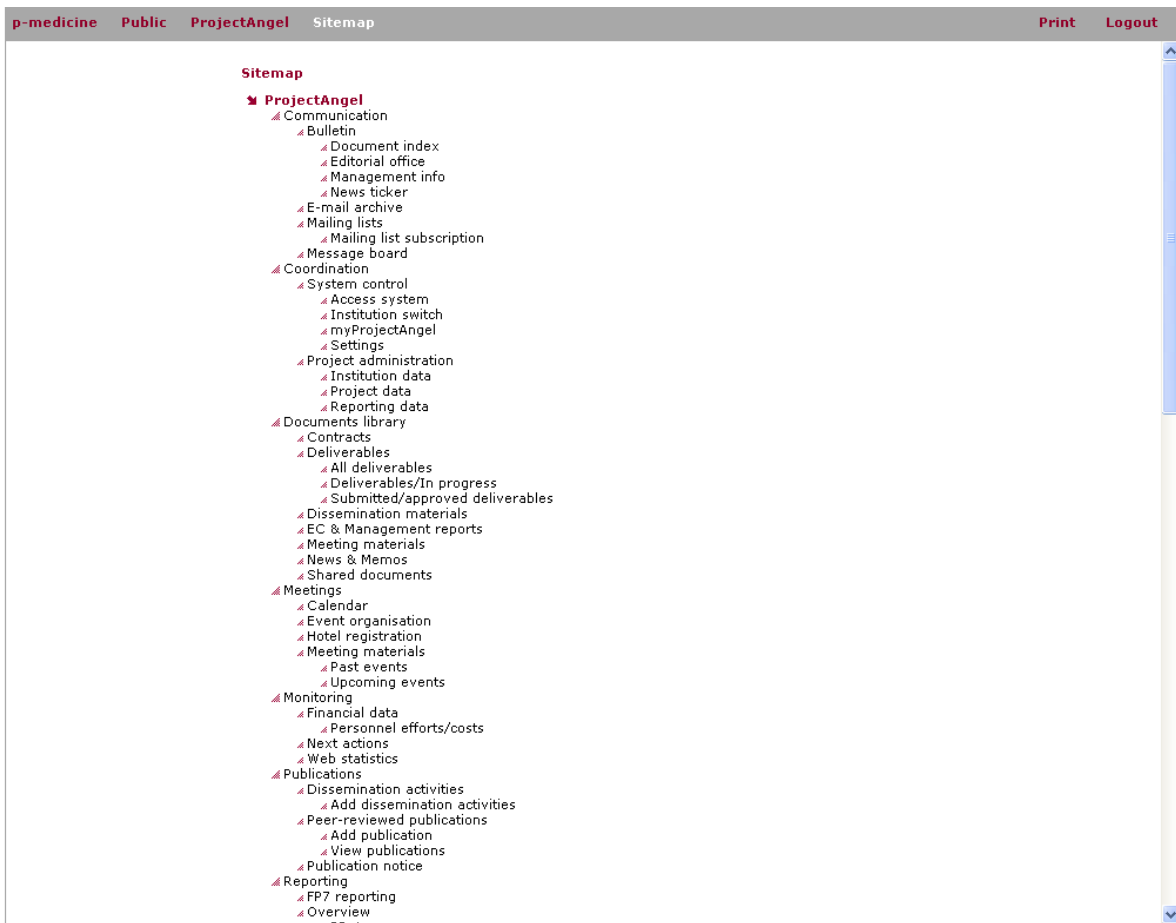


Figure 56 Sitemap

The sitemap is a simple list of pages of the ProjectAngel platform accessible to its users, organised in a hierarchical fashion but offering a general top-down view of the overall site contents. It also acts as a navigation aid by providing an overview of a site's content at a single glance supported by underlying hyperlinks which lead the user directly to the single web page.

18. Basic functionalities

The p-medicine ProjectAngel platform currently offers the following functionalities:

- Authorisation via a comfortable access mechanism,
- Provision of simple database connections for data import and export,
- SSL-coded data transmission,
- Set-up of POP3 mail accounts,
- Possibility of a monthly analysis of user access and web site traffic,
- A central database connection that enables the storage of documents, events and member information, etc.,
- External URLs are opened in new windows,
- E-mail links apply the user's default e-mail programme,
- Technical information about the website.

19. Technical requirements

To correctly display the contents of the web site the following conditions should be fulfilled:

Browser

- Internet Explorer from version 6.0 or
- Mozilla Firefox from version 2.0 (recommended).

Screen size

- The website has been optimised for a resolution of 1280 x 1024.
- The set resolution should not be less than 800 x 600 pixels.

Depth of colour

- The depth of colour should be at least 16 bits (65,536 colours).

JavaScript

- The browser must allow JavaScript in order to adequately display the website.

20. Initial setup – System statistics

System component	Quantity
Platform users	88
Platform user groups	28
Documents	113
Document categories	46
Work packages	17
Institutions	20
Bank accounts	1
Mailing lists	28
Milestones	49
Reporting periods	4

21. ProjectAngel Updates

21.1. ProjectAngel 7.1.7: New 'Payments' feature for the coordinator

Helps keep track of the Community financial contribution and its distribution to the beneficiaries. This new feature helps the coordinator record information on the distribution of the Community financial contribution. It provides a clear overview that can be submitted to the European Commission when requested or at regular intervals with the periodic progress report.

In 'Reporting' the payment distribution info can be recorded for the reporting period in question. In the 'Coordination' module it can be entered for any given time (see Project data).

21.2. ProjectAngel 7.1.6: New 'Dissemination activities' feature in 'Publications'

Report all dissemination activities carried out in the context of the project for any given date. Now you can list your project dissemination activities in 'Publications' as well as in 'Reporting'. Either way the entries will be available for the periodic progress report. Compared to 'Reporting' where you can only enter the activities for the corresponding reporting period, in 'Publications' you are free to list the activities of any particular date. Another difference, is that in 'Reporting' only the team leaders can enter dissemination activities, and in 'Publications' all authorised participants can report this information.

To access this new feature go to 'Publications' and select 'Dissemination activities'.

21.3. ProjectAngel 7.1.5: New 'Summary financial report' section in 'Reporting'

The coordinator can view all the financial data reported to the EC in the Forms C. The new 'Reporting' section is titled 'Summary financial report', and is listed as the last section in the 'Report directory'. It can only be seen/accessed by the project coordinator and his/her management team. The 'Summary financial report' has two parts:

Summary

This table consolidates the claimed Community contribution of all the beneficiaries in an aggregate table, based on the information provided in Form C by each beneficiary. It allows the coordinator to do a final check on all the numbers reported by the consortium before forwarding the information to the EC.

Cost follow-up

This table displays the planned budget, the actual costs incurred in each reporting period and the remaining amount. It provides an exact picture of the budget's current status, and enables the coordinator to monitor its progress as well as take any corrective actions if necessary. This information should also prove helpful with the management part (project planning and status) of the 'Periodic Report'.

21.4. ProjectAngel 7.1.4: Update of the 'Deadline settings & checklists'

The 'Check staff effort' overview has been improved. Now when you go to 'Check staff effort' you can see at a glance the number of person months each institution has spent during the corresponding reporting period for each work package as well as for the entire project.

You will also be able to compare the actual person months with the number of person months planned for the corresponding reporting period, as well as with the number of person months foreseen in the work plan for the full project duration. And finally, the table now calculates the personnel effort that has been spent so far and how many person months remain in your budget.

Use these tables to check the numbers the consortium has reported, either here in 'Reporting' and/or in 'Monitoring', and identify possible discrepancies in the partners' entries. Differences between planned, actual and foreseen efforts are also easily detected here. In addition to helping you with the management part (project planning and status) of the 'Periodic Report', this information allows you to take corrective actions if necessary.

21.5. ProjectAngel 7.1.3: Update of the 'Publications' module

'Publications' has been improved and adjusted to meet the requirements of the EC even better. In general the 'Publications' module has been restructured to make it easier for you to work with and find listed publications.

Additionally, the publication statuses have been reviewed and expanded so that they can accurately describe the various stages a document undergoes during publication. They are now as follows:

- Pending consent by the consortium: the document has been submitted to the consortium for comments. It has not been published yet.
- Vetoed by the consortium: the document has been vetoed by the consortium.
- Accepted by the consortium: the document's publication has been accepted by the consortium. It has not necessarily been published yet (e.g. pending approval from the editor).
- Cancelled: the document has been cancelled for publication.
- Peer reviewed: the document has been subjected to a peer review process. It has been accepted by the consortium, and has been published.

Finally, the online form to submit information on an upcoming publication has been adjusted to meet the requirements of the EC regarding the Final Report (Template A). According to this template a list of all scientific (peer reviewed) publications relating to the foreground of the project must be provided. Therefore these entry fields have been added to the entry form:

- Title of the periodical or the series
- Number, date or frequency
- Publisher
- Place of publication
- Relevant pages
- Permanent identifiers (e.g. DOI):
- Is/Will open access provided to this publication?

21.6. ProjectAngel 7.1.2: Update: New 'File upload' feature in Reporting module

Attach graphic files or tables to your work progress report. The new 'Reporting' feature is intended to help illustrate your work by allowing you to attach up to three files (images, graphs, tables, etc.) to your progress report.

This 'File upload' feature can be found in the sections 'Work progress TL' and 'Work progress WPL', where it is integrated under the entry box marked 'Description of work - details for each task and significant results'.

21.7. ProjectAngel 7.1.1: Update: New 'Deadline settings & checklists' feature in 'Reporting'

Allows to check staff efforts, the progress reports, send reminders, and adjust deadlines. The new 'Reporting' feature is titled 'Deadline settings & checklists', and can be found in the bottom half of the 'Report directory'. It can only be seen/accessed by the project coordinator and his/her management team.

'Deadline settings & checklists' allows you to

- see at a glance if, when, and by whom a work progress report (TL or WPL) was written;
- verify the actual status (draft, preliminary, final) of a work progress report (TL or WPL);
- send personalised reminders to team leaders/work package leaders if contributions are delayed or missing;
- check the planned and actual personnel effort as reported by the team leaders;
- set or adjust the deadlines for each section of the online reporting procedure.

21.8. ProjectAngel 7.1: Stepping up to your needs

We are always working to facilitate your day-to-day communication, help coordinate your project activities and organise your work plan even better. In short: there's always room for improvement.

ProjectAngel 7.1 provides you with a number of updates that make working with the ProjectAngel platform even more intuitive and user-friendly. Based in part on your feedback the navigation has been slimmed down and restructured. The project 'Monitoring' feature has undergone a complete makeover and now offers a useful tool to help manage your project work. Find out more about the latest improvements:

Updated navigation lets you find what you're looking for faster

- the different ProjectAngel modules have been renamed, so that their titles are clear and to the point
- they are now listed in alphabetical order
- the general structure has been revised and the sub-pages reduced
- and finally we have added a sitemap, where you can see all of ProjectAngel at a glance

'Monitoring' makes it easier to keep track and report the personnel efforts expended on the project

- the section 'Financial Data' allows you to record the personnel efforts and costs that are charged to the project, as well as monitor planned personnel efforts
- personnel efforts are broken down in work packages; and both efforts and costs are sorted according to reporting periods

- the data you enter here is mirrored in 'Reporting', so that you only need to enter two figures each month for every person working on the project - and save yourself time and hassle when it comes to the periodic reporting
- last but not least a section for timesheets has been added where you can access and upload the timesheets of your institution

22. Annex I – Manual ‘PA7.1 – Team leader reporting in brief’

Work progress and achievements during the period – Team leader report

The section 'Work progress and achievements during the period (TL)' concerns the project work carried out on institutional level and is divided into six parts: overview, work progress, deliverables, milestones, staff effort, and dissemination activities. All of which can be accessed by selecting the corresponding tabs in the top row navigation.

Of these six parts **only two require** input from you as team leader. The other four parts represent read-only tables containing either information concerning the work plan or an overview of the data you have entered.

Your input as team leader is required for these two parts:

1. Work progress

What?

Summarise the project work which was achieved **by your institution/working group** during the reporting period according to work packages. The information must cover:

Actual effort – check/report the actual effort in person-months expended during the reporting period for the work package in question.

Objectives – report the progress achieved towards planned objectives and highlight clearly significant results of your working group.

Description of work – report the details for each task and significant results

Deviations – report whether any deviations in the work plan have occurred and/or if any critical objectives have not been achieved or are behind schedule. In both cases explain the reasons for these deviations and their impact on other tasks as well as on available resources and planning, and propose corrective actions.

How?

Go to the section 'Work progress and achievements during the period (TL)', and select the tab 'Work progress' from the top row navigation.

First make sure to select the corresponding work package from the drop-down menu titled 'Work package number'; then check the actual effort and enter the requested information in each box (objectives, description of work, deviations).

If you want to change the actual personnel efforts for the current reporting period however, click the 'Monitoring/Efforts' link in the upper right-hand corner and enter/change the data in the 'Monitoring' module according to the different work packages and persons carrying out work under the project.

Finally, you must define your report's status as a draft, preliminary, or final version by selecting the corresponding description from the drop-down menu titled 'Status'.

Important! If you decide to modify your finished report (status selected is 'final'), then you must mention this in the box titled 'Comments' in order to alert the corresponding Work Package Leader and coordinator about the

change in your work progress report. This is important to ensure that the corrected version of your contribution is included in the main periodic report document.

2. Dissemination activities

What?

For this part please provide information on your institution's project dissemination and exploitation (i.e. 'Use of foreground') activities, that were carried out during the reporting period.

How?

Go to the section 'Work progress and achievements during the period (TL)', and select the tab 'Dissemination activities' from the top row navigation. Then click the green 'add' icon to make a new entry either for 'Use of foreground' or 'Dissemination activities'. A new window will open where you can fill out the requested information.

All exploitable foreground, including any plans for exploitation, you report, will be kept confidential and treated as such by the EC.

Important! Publications are not listed here, but instead must be reported in the 'Publications Area'.

These other parts are read-only tables that do not require your input:

3. Overview

What?

This table gives you an overview of all the work packages and shows you whether or not an entry has already been made. The work packages marked with a green arrow over the 'pencil' icon in the last column are the ones your institution is involved in and must be reported on.

How?

The 'Overview' is the first thing you will see when you go to the section 'Work progress and achievements during the period (TL)'.

4. /5. Deliverables and milestones

What?

This table shows you the deliverables and milestones that are due during the reporting period as well as those that should have been achieved in previous reporting periods.

How?

Go to the section 'Work progress and achievements during the period (TL)', and select the tabs 'Deliverables' or 'Milestones' from the top row navigation.

If you notice that a deliverable/milestone is missing or incorrect, please contact your project administrative coordinator or projectangel@progressima.eu.

6. Staff effort

What?

This table lists the planned and actual personnel efforts expended in your work package(s) as reported by the team leaders in the 'Monitoring' module.

How?

Go to the section 'Work progress and achievements during the period (TL)', and select the tab 'Staff effort' from the top row navigation.

If you want to change the actual personnel efforts for the current reporting period however, go to 'Work progress', select the corresponding work package, and enter/change the data by clicking on the 'Monitoring/Efforts' link as described above.

23. Annex II – Manual ‘PA7.1 – Work page leader reporting in brief’

Work progress and achievements during the period – Work package leader report

The section 'Work progress and achievements during the period (WPL)' concerns the project work carried out in your work package and is divided into five parts: overview, work progress, deliverables, milestones, and staff effort. All of which can be accessed by selecting the corresponding tabs in the top row navigation.

Of these five parts **only three require** input from you as work package leader. The other parts represent read-only tables containing an overview of the data you have entered and the staff effort expended for your work package(s) as reported by all involved beneficiaries.

Your input as work package leader is required for these three parts:

1. Work progress

What?

Summarise the project work which was carried out for your work package(s) during the reporting period. The information must cover:

Objectives – report the progress achieved towards planned objectives and highlight clearly significant results of the work package.

Description of work – summarise the details of each work package task and report significant results.

Deviations – report whether any deviations in the work plan have occurred and/or if any critical objectives have not been achieved or are behind schedule. In both cases explain the reasons for these deviations and their impact on other tasks as well as on available resources and planning, and propose corrective actions.

Under the header 'Contributions of the team leaders' you will find the work progress reports of the institutions involved in your work package(s) – if they have been submitted by the corresponding team leader. You may find this information helpful when writing your work package summary.

How?

Go to the section 'Work progress and achievements during the period (WPL)', and select the tab 'Work progress' from the top row navigation.

First make sure to select the corresponding work package from the drop-down menu titled 'Work package number'; then enter the requested information in each box (objectives, description of work, deviations).

To view the work progress reports of the different institutions involved in your work package(s) click the '+' icon that is displayed on the left of the institution acronym under the header 'Contributions of the team leaders'. A panel will then open showing the information concerning the work package as it was submitted by the corresponding team leader. Be aware that team leaders can continue to make changes to a submitted report, so be sure to check if any comments have been made by the team leaders in this regard.

Finally, you must define your report's status as a draft, preliminary, or final version, by selecting the corresponding description from the drop-down menu titled 'Status'.

Important! If you decide to modify your finished report (status selected is 'final'), then you must mention this in the box titled 'Comments' in order to alert the coordinator about the change in your work progress report. This is important to ensure that the corrected version of your contribution is included in the central periodic report document.

2. Deliverables

What?

This table shows you the deliverables pertaining to your work package(s) that are due during the reporting period as well as those that (should) have been achieved in previous reporting periods.

Here you should enter the actual or foreseen delivery date, and indicate if any changes have been carried out regarding the work plan (e.g. deliverable has been cancelled, regrouped with another one, or new deliverables have been added to the work plan).

How?

Go to the section 'Work progress and achievements during the period (TL)', and select the tab 'Deliverables'. Then either double-click on the entry in question or select the 'pencil' icon to enter or edit the actual/foreseen delivery date as well as comment on a deliverable.

If you notice that a deliverable is missing or incorrect, please contact your project administrative coordinator or projectangel@progressima.eu.

Important! Achieved deliverables that are of a nature other than written 'reports' such as 'prototypes', 'demonstrators' or 'others' should also be accompanied by a short report, so that the European Commission has a record of their existence. These documents should be uploaded and made available in the 'Document Repository'.

3. Milestones

What?

This table shows you the milestones pertaining to your work package(s) that are due during the reporting period as well as those that (should) have been achieved in previous reporting periods.

Here you should enter the actual or foreseen delivery date, and indicate if any changes have been carried out regarding the work plan.

How?

Go to the section 'Work progress and achievements during the period (TL)', and select the tab 'Milestones'. Then either double-click on the entry in question or select the 'pencil' icon to enter or edit the actual/foreseen delivery date, explain the means of verifying the milestone's achievement, and include any relevant comments.

If you notice that a milestone is missing or incorrect, please contact your project administrative coordinator or projectangel@progressima.eu.

These other parts are read-only tables that do not require your input:

4. Overview

What?

All project work packages assigned to you as work package leader are listed in this overview. The status symbol shows whether or not an entry has been made by you or someone authorised from your institution.

How?

The 'Overview' is the first thing you will see when you go to the section 'Work progress and achievements during the period (WPL)'.

5. Staff effort

What?

This table lists the planned and actual personnel efforts expended in your work package(s) as reported by the team leaders.

How?

Go to the section 'Work progress and achievements during the period (WPL)', and select the tab 'Staff effort' from the top row navigation.

If you are responsible for several work packages, you can view the staff effort information for a specific work package by selecting it from the drop-down menu.

24. Annex III – Manual ‘PA7.1 – Financial reporting in brief’

Financial reporting in brief and step-by-step for team leaders and financial administrators

3. Project Monitoring: Personnel efforts/costs

Enter two figures each month for every person working on the project – and save yourself time and hassle when it comes to the periodic reporting.

What?

The personnel efforts/costs should be recorded throughout the project year in 'Project Monitoring'. The EC stipulates in their guide to financial issues, that only the costs of the actual hours worked on the project may be charged and that the working time has to be attributed to one or several of the project's work packages.

ProjectAngel helps you record the number of hours each member of your team has worked on the project every month, as well as allocate the working time to the work packages. ProjectAngel further allows registering the monthly personnel costs charged on the project.

In order to accurately convert the actual person hours for each individual, the person responsible for the project's financial reporting at your institution must enter the number of hours that correspond with one 'person month' (otherwise ProjectAngel uses a standard of 140 hours/1 person month).

Finally, for a better comparison of the actual and planned efforts you can enter the planned personnel efforts for each project month (as opposed to the entire project duration indicated in the Grant Agreement, Annex I). Recording the planned efforts, however, is optional and is not relevant for the financial reporting, unless otherwise required and communicated by your EC project officer.

How?

Go to 'Project Monitoring' in the left-hand navigation and select 'Financial data' > 'Personnel effort/costs'.

The tab titled 'Person hours charged' will open up. Before making an entry here, please

(1) certify under the tab titled 'Conversion factor' whether the number of person hours that correspond with one person month is correct according to your institution's accounting practices.

(2) confirm that the personnel details of the persons carrying out project work have been recorded under the tab titled 'Personnel settings' by the person responsible for reporting the project's financial data (financial administrator).

(3) check under the tab titled 'Person hours charged' if the actual hours worked by each person carrying out work under the project has been recorded according to the different work packages, and if not enter the corresponding data.

If these entries have been made and are correct, then return to 'Personnel costs charged' and enter the monthly costs charged on the project for each person listed. If a person's name is not listed in the drop-down menu click 'Register a new personnel resource' and follow the instructions that appear in the pop-up window.

Important! The personnel details including the monthly costs can only be viewed by the person(s) responsible for reporting the project's financial data (generally team leader and/or financial administrator) and the project coordinator.

4. Reporting: Explanation of the use of the resources and Financial Statement

The financial information that must be reported consists of two main parts: the 'Explanation of the use of the resources' and the 'Financial Statement', which is split into the 'Cost breakdown' and 'Form C'.

For both parts the 'Cost breakdown' provides the calculatory base, since the figures entered here are relevant for the 'Explanation of the use of the resources' and the 'Form C'. Therefore the first step when reporting your financial information is to fill out the 'Cost breakdown'.

2.1 Cost breakdown

What?

The first part of the financial reporting consists of detailing the project expenditure of your institution for the reporting period in question according to personnel, subcontracting, durable equipment, consumables, travel, and other specific costs.

The personnel costs are reported throughout the project year in 'Project Monitoring' and are shown here for you to check. If you need to make any adjustments to the personnel costs click on the link marked 'Personnel efforts/costs' in the upper right-hand corner and follow the instructions (see above chapter 3. Project Monitoring: Personnel efforts/costs).

How?

Go to the section 'Financial Statement', select the cost category you wish to report on from one of the tabs (top row navigation) and enter the requested information.

The sum of all entries is listed in 'Cost breakdown'. If all entries are correct, then the status can be changed from 'Draft' to 'Final' (finalise cost breakdown). Once this has been done then further modifications will not be possible.

Important! The 'Cost breakdown' must be declared 'Final' in order to finalise the 'Explanation of the use of the resources'.

2.2 Form C

What?

Each beneficiary must submit a financial statement (Form C) to the European Commission. The Form C shown here is for the most part automatically generated based on the 'Cost breakdown' (if declared).

How?

Go to the section 'Financial Statement' and select the tab 'Form C' from the top row navigation.

The first part of Form C ('Declaration of eligible costs') is automatically filled out based on the figures reported in the 'Cost breakdown'.

The team leader or financial administrator authorised to finalise Form C should check, and if necessary adjust the costs. In addition, he/she has to enter the requested EC contribution and fill in the remaining parts N° 2-5 of the form.

Institutions reporting actual indirect costs or those applying the simplified method must also enter their indirect costs here.

If all entries are correct, then the status can be changed from 'Draft' to 'Final'. Once Form C has been declared finalised, further modifications will not be possible.

2.3 Explanation of the use of the resources

What?

Based on the figures entered in the 'Cost breakdown', the team leaders have to explain the use of resources incurred in each work package. The direct linkage between scientific and financial part guarantees a high degree of transparency for the EC and avoids potential discrepancies concerning both statements.

How?

First, go to the section 'Explanations of the use of the resources', select the tab 'Per work package' from the top row navigation.

Here you will find the expended costs for each work package based on the figures entered in the 'Cost breakdown'. Check these entries, and carry out any necessary changes concerning the amount or explanations. To copy data from the cost breakdown (upper table) select the icon 'Transfer data' of each cost icon, or to copy all the data from the cost breakdown select the icon 'Transfer all data' that is displayed in the lower right-hand corner.

Second, select the tab 'Per beneficiary' from the top row navigation.

Here you will find a complete explanation of the use of the resources for your institution based on the (adjusted) entries listed in 'Per work package'. Check these entries, and carry out any necessary changes as described above. If all entries are correct, then the status can be changed from 'Draft' to 'Final'. Once this has been done further modifications will not be possible.

Important! The 'Explanation of the use of the resources' can not be completed/adjusted until the 'Cost breakdown' has been finalised (status 'Final' selected in 'Cost breakdown').