

Project reporting

Project progress report (PPR)

11 April 2018

Project reporting

- Project progress reporting to ITEA is done via Project Reviews & Project Progress Reports (PPR)
 - Project reviews are explained in another instruction video

- Project Progress Report (PPR) principle:
 - Complementary to Project Reviews
 - Focused on project status and progress
 - Reviewed by 2 STG reviewers
 - Timely delivery is crucial: non-delivery is escalated to the ITEA Board Support Group

- Objectives:
 - check if projects are on track
 - provide support to steer projects towards their objectives
 - ensure all partners are aligned



Project reporting

- Schedule:
 - biannual reporting: mid-September (January-June, running at the 1st March) and mid-February (July-December, running at the 1st September)
 - projects completing during a semester do not need to report for this semester (final review is enough)

- Always check online the latest template version
 - only the latest one will be accepted

- The PPRs are accessible by ITEA Bodies (STG, BSG, Board) and Public Authorities (only if partners of their country participate)

- PPR is created based on both offline and online input
 - Offline Template: ITEA 3 PPR template (MS Word file)
 - This offline template includes fields that will be merged with online input
 - Project leader, Workpackage leaders and technical contacts have different roles and reporting fields.
- Please make sure to use the latest PPR template on the ITEA community website. The latest version of PPR and instruction can be found from the following location: (ITEA Community website>Documents & templates> Guidelines & Templates > [Progress Reports](#)). Detailed instruction can be found there too.
- The following slides provides you a graphical instruction about how-to create a PPR and submit it.



- The Project leader should
 - create a PPR folder for the reporting period
 - ask project partners and work package leaders to provide their input on the ITEA Community website
 - select the top 8 Exploitation related achievements (ERAs) among the list created by project partners
 - fill in the offline PPR template and upload it to the PPR folder

- The WP leader should
 - describe the work package progress

- The individual partners should
 - Describe the partner specific achievements
 - Indicate the actual effort spent (explain the difference with the planned effort if applicable)

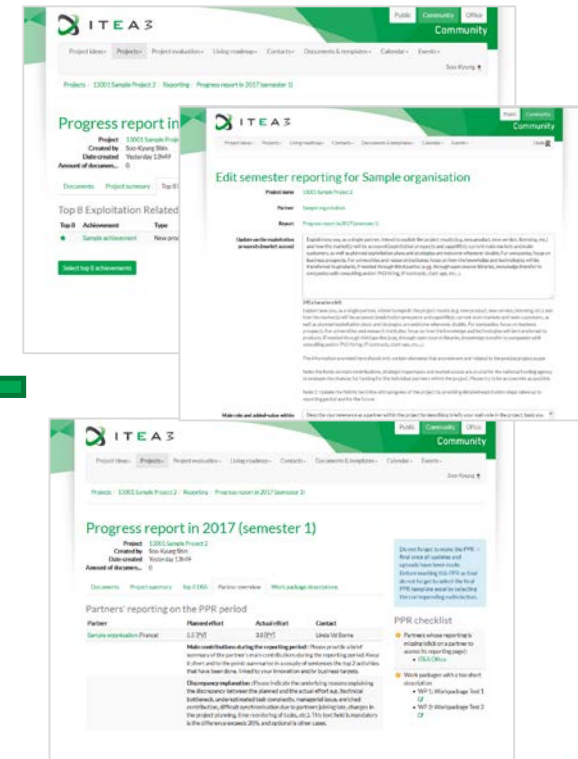
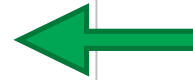
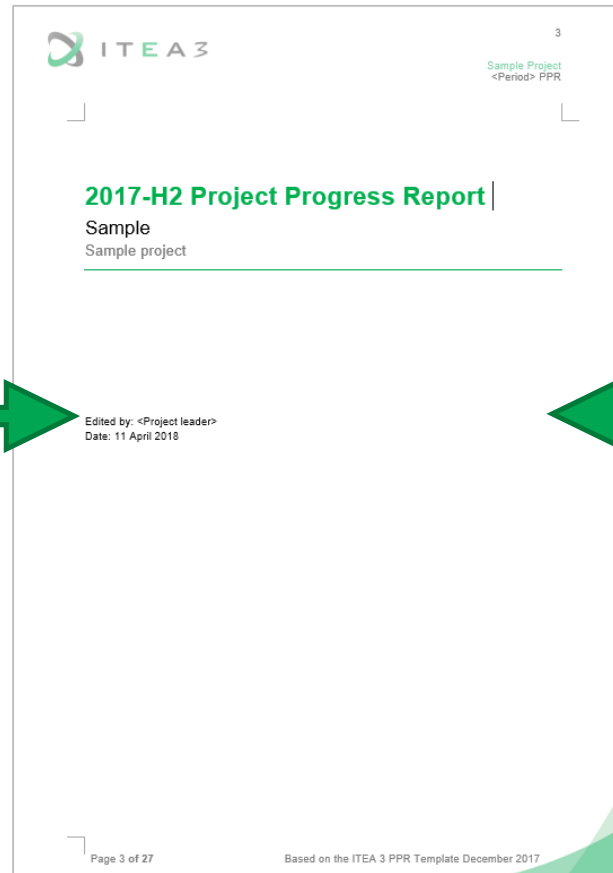
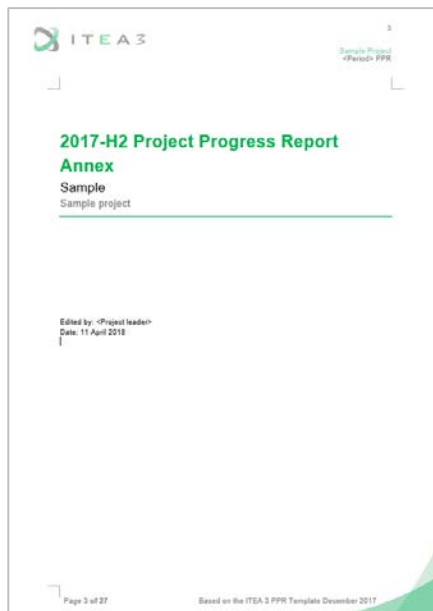


Project reporting PPR creation

Offline PPR Annex template

Merged PPR

Online input for PPR




Global report by
project leader

- Project key data
- Per partner & WP report
- Selection of top 8 ERAs

Project reporting

PPR Creation – creation of PPR folder

Public Community Office

Community

Project ideas - Projects - Project evaluation - Living roadmap - Contacts - Documents & templates - Calendar - Events - Soo-Kyung

Projects / 13001 Sample Project 2 / Reporting

13001 Sample Project 2

Basics Partners Countries Work packages Costs & effort **Reporting** Calendar

Management

Proposed top 8 Exploitation Related Achievements

Select the top 8 Exploitation Related Achievements by checking / unchecking the stars in first column. Only the first 8 ones (green rows) will appear in the generated Project Progress Reports. Reload the page (F5) to see the impact of selection changes. NB: the ordering is based on creation date, which means only the selection matters, not the ranking.

Top 8	Achievement	Type	Date	Status	Contact
1: ★	Sample achievement	New product (Exploitation)	05 Oct 2016	Planned	Soo-Kyung Shin

Involved partners: ITEA Office (NLD)

+ Create new achievement How to select top 8 ERA

Report	Contact	Date	Final	Documents
Progress report in 2015 (semester 2) 📄	Soo-Kyung Shin	10 Jun 2016		1
Progress report in 2017 (semester 1) 📄	Soo-Kyung Shin	Yesterday 13h49		0

+ Create report How to create a PPR

Report	Date	Contact	Content type	Size
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Help

- Introduction
- Submission Process
- Change request
- Project management
- Project progress reporting
- Project reviews

The project information has changed since the latest Change Request that you have submitted (changes online are marked in purple). Do not forget to submit a new Change Request once all checks are successful (a button will then appear), otherwise your changes are not taken into account.

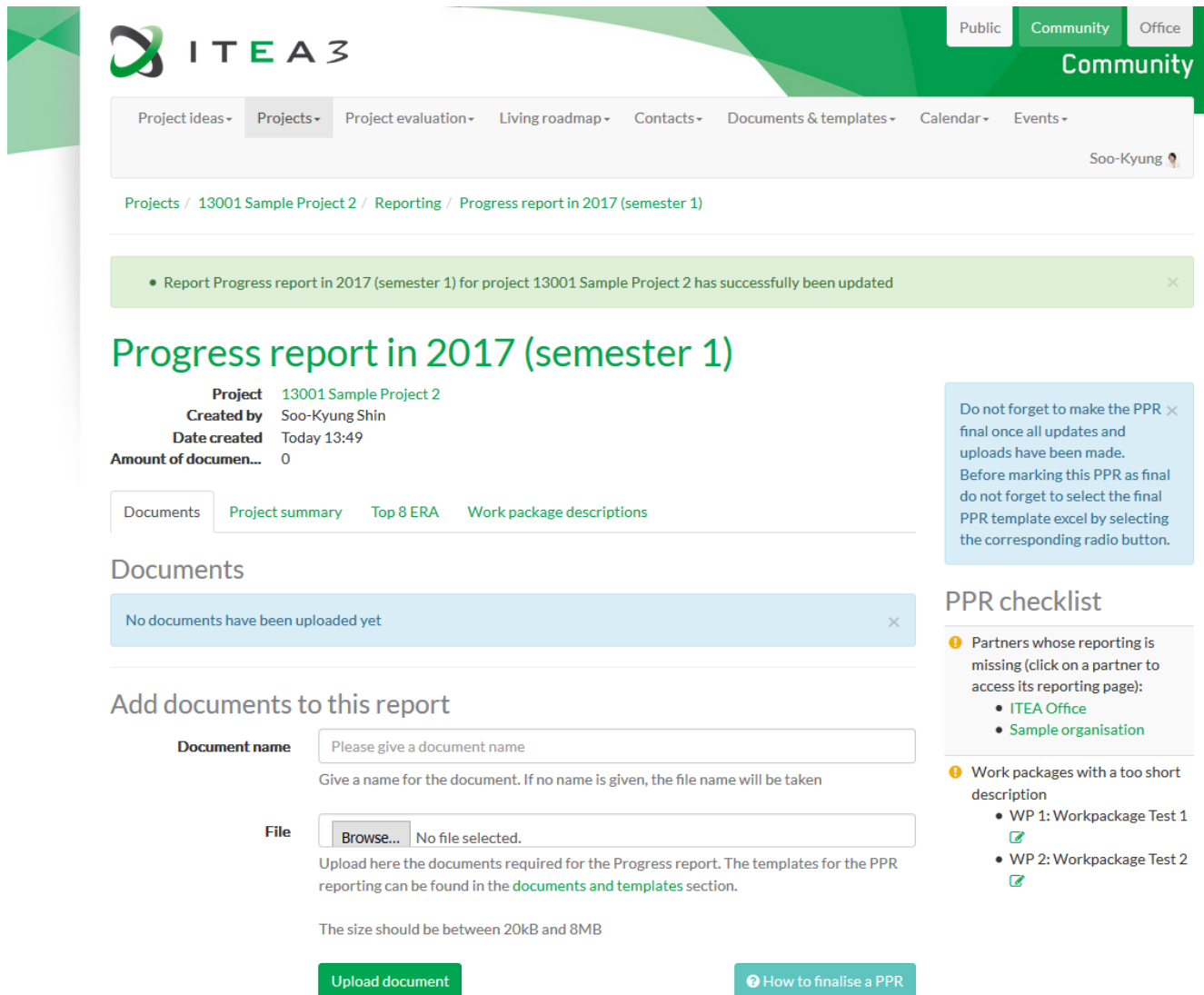
Project checklist

- ▲ The following countries have no Rationale for public funding
 - France
 - Netherlands



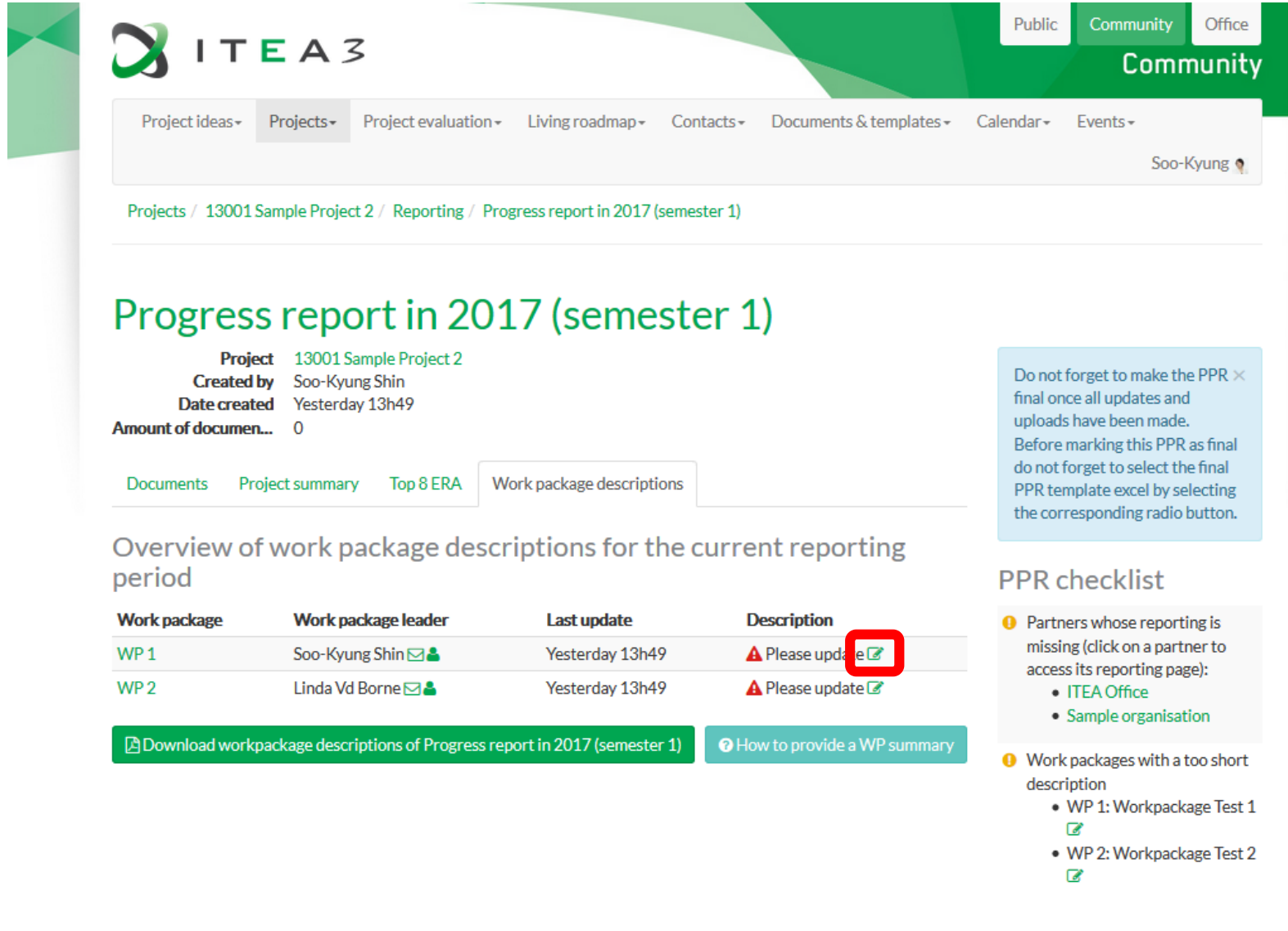
Project reporting

PPR Creation – PPR folder



The screenshot shows the ITEA3 web application interface. At the top, there is a navigation bar with 'Public', 'Community', and 'Office' tabs. Below this is a breadcrumb trail: 'Projects / 13001 Sample Project 2 / Reporting / Progress report in 2017 (semester 1)'. A green notification bar states: 'Report Progress report in 2017 (semester 1) for project 13001 Sample Project 2 has successfully been updated'. The main heading is 'Progress report in 2017 (semester 1)'. Below the heading, a table lists project details: Project (13001 Sample Project 2), Created by (Soo-Kyung Shin), Date created (Today 13:49), and Amount of documents (0). There are tabs for 'Documents', 'Project summary', 'Top 8 ERA', and 'Work package descriptions'. A blue notification bar says 'No documents have been uploaded yet'. The 'Add documents to this report' section includes a 'Document name' field with a placeholder 'Please give a document name' and a 'File' field with a 'Browse...' button and 'No file selected.' text. Below the file field, instructions state: 'Upload here the documents required for the Progress report. The templates for the PPR reporting can be found in the documents and templates section. The size should be between 20kB and 8MB'. At the bottom, there are two buttons: 'Upload document' and 'How to finalise a PPR'. On the right side, there is a 'PPR checklist' section with two items: 'Partners whose reporting is missing (click on a partner to access its reporting page):' with sub-items 'ITEA Office' and 'Sample organisation'; and 'Work packages with a too short description' with sub-items 'WP 1: Workpackage Test 1' and 'WP 2: Workpackage Test 2', each with a checkmark icon.





The screenshot shows the ITEA 3 web interface. At the top, there is a navigation bar with 'Public', 'Community', and 'Office' tabs. Below this is a secondary navigation bar with 'Community' highlighted. A user profile 'Soo-Kyung' is visible in the top right. A breadcrumb trail reads 'Projects / 13001 Sample Project 2 / Reporting / Progress report in 2017 (semester 1)'. The main heading is 'Progress report in 2017 (semester 1)'. Below the heading, there is a metadata section: 'Project: 13001 Sample Project 2', 'Created by: Soo-Kyung Shin', 'Date created: Yesterday 13h49', and 'Amount of documents: 0'. There are tabs for 'Documents', 'Project summary', 'Top 8 ERA', and 'Work package descriptions'. The 'Work package descriptions' tab is active, showing a table with two rows. The first row, 'WP 1', has a 'Please update' message and a red box around a pencil icon. The second row, 'WP 2', also has a 'Please update' message and a pencil icon. Below the table are two buttons: 'Download workpackage descriptions of Progress report in 2017 (semester 1)' and 'How to provide a WP summary'. On the right side, there is a light blue box with a warning icon and text: 'Do not forget to make the PPR final once all updates and uploads have been made. Before marking this PPR as final do not forget to select the final PPR template excel by selecting the corresponding radio button.' Below this is a 'PPR checklist' section with two items: 'Partners whose reporting is missing (click on a partner to access its reporting page):' with sub-items 'ITEA Office' and 'Sample organisation'; and 'Work packages with a too short description' with sub-items 'WP 1: Workpackage Test 1' and 'WP 2: Workpackage Test 2', each with a pencil icon.

Project 13001 Sample Project 2
Created by Soo-Kyung Shin
Date created Yesterday 13h49
Amount of documents 0

Documents Project summary Top 8 ERA Work package descriptions

Overview of work package descriptions for the current reporting period

Work package	Work package leader	Last update	Description
WP 1	Soo-Kyung Shin	Yesterday 13h49	Please update
WP 2	Linda Vd Borne	Yesterday 13h49	Please update

Download workpackage descriptions of Progress report in 2017 (semester 1) How to provide a WP summary

Do not forget to make the PPR final once all updates and uploads have been made. Before marking this PPR as final do not forget to select the final PPR template excel by selecting the corresponding radio button.

PPR checklist

- Partners whose reporting is missing (click on a partner to access its reporting page):
 - ITEA Office
 - Sample organisation
- Work packages with a too short description
 - WP 1: Workpackage Test 1
 - WP 2: Workpackage Test 2




Project reporting

PPR Creation – Role of a WP leader

Projects / 13001 Sample Project 2 / Reporting / Progress report in 2015 (semester 2) / WP 1 description

Edit work package description

Project 13001 Sample Project 2 

Report Progress report in 2015 (semester 2) 

Work package WP 1: Workpackage Test 1

Description

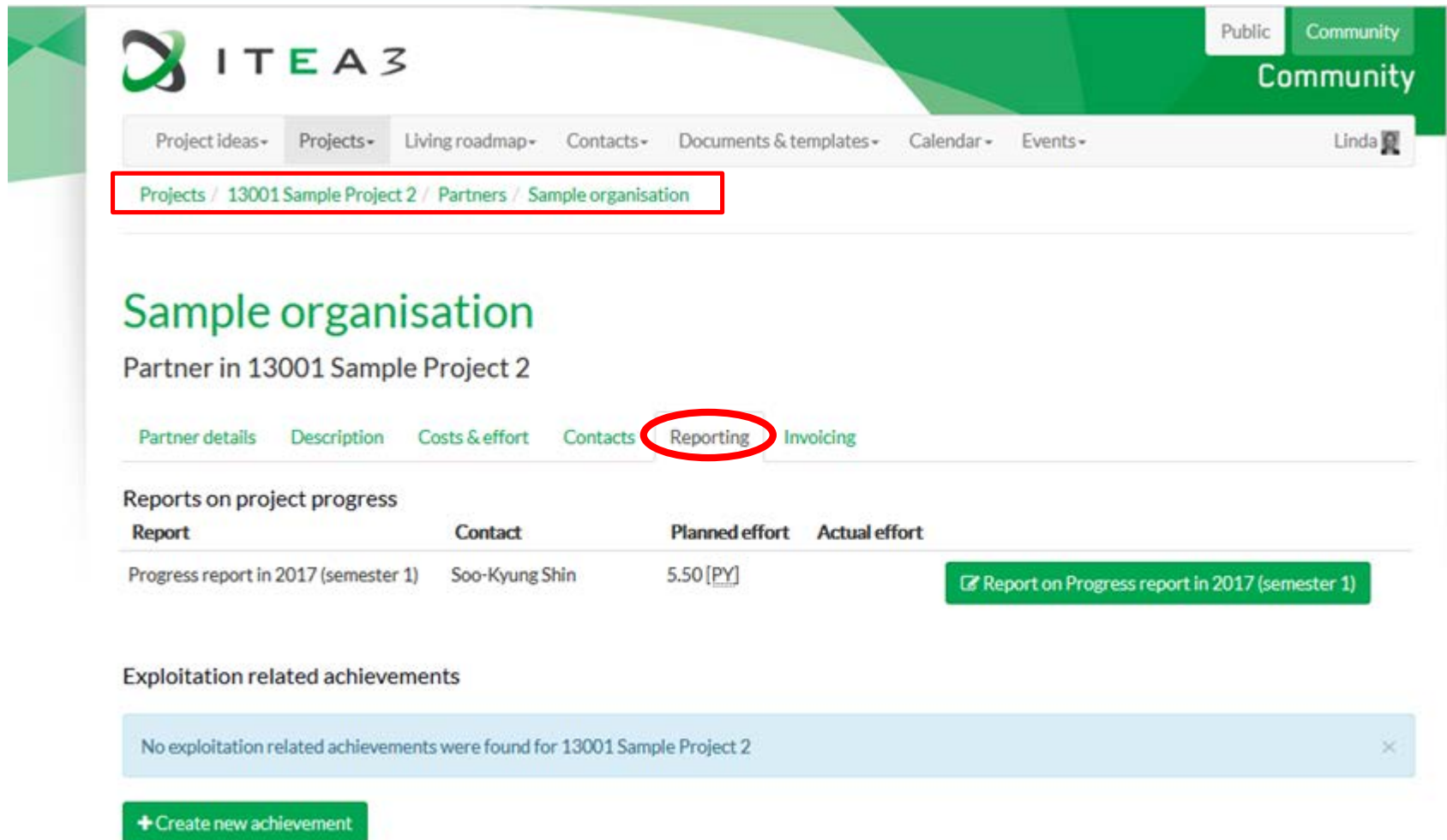
Please fill in the progress of WP "during" the reporting period.

Give here a brief description of the progress in the work package

Submit

Cancel





The screenshot shows the ITEA3 Community website interface. At the top, there is a navigation bar with the ITEA3 logo on the left and 'Public' and 'Community' tabs on the right. Below the navigation bar is a menu with items: 'Project ideas', 'Projects', 'Living roadmap', 'Contacts', 'Documents & templates', 'Calendar', and 'Events'. A user profile for 'Linda' is visible in the top right corner. A breadcrumb trail is highlighted with a red box: 'Projects / 13001 Sample Project 2 / Partners / Sample organisation'. The main content area is titled 'Sample organisation' and is identified as a 'Partner in 13001 Sample Project 2'. Below the title is a horizontal menu with tabs: 'Partner details', 'Description', 'Costs & effort', 'Contacts', 'Reporting' (circled in red), and 'Invoicing'. Under the 'Reporting' tab, there is a section titled 'Reports on project progress' with a table. The table has columns for 'Report', 'Contact', 'Planned effort', and 'Actual effort'. One row is visible: 'Progress report in 2017 (semester 1)' by 'Soo-Kyung Shin' with a 'Planned effort' of '5.50 [PY]'. To the right of this row is a green button with a checkmark icon and the text 'Report on Progress report in 2017 (semester 1)'. Below the table is a section titled 'Exploitation related achievements' with a light blue message box stating 'No exploitation related achievements were found for 13001 Sample Project 2'. At the bottom left of this section is a green button with a plus sign and the text '+ Create new achievement'.

Project reporting

Community website – For a partner



The screenshot shows the ITEA3 Community website interface. At the top, there is a navigation bar with the ITEA3 logo on the left and 'Public' and 'Community' tabs on the right. Below the tabs, a horizontal menu contains links for 'Project ideas', 'Projects', 'Living roadmap', 'Contacts', 'Documents & templates', 'Calendar', and 'Events'. A user profile for 'Linda' is visible on the right side of the menu.

Edit semester reporting for Sample organisation

Project name 13001 Sample Project 2

Partner Sample organisation

Report Progress report in 2017 (semester 1)

Update on the exploitation prospects (market access)

Explain how you, as a single partner, intend to exploit the project results (e.g. new product, new service, licensing, etc.) and how the market(s) will be accessed (exploitation prospects and capability); current main markets and main customers, as well as planned exploitation plans and strategies are welcome whenever doable. For companies, focus on business prospects. For universities and research institutes, focus on how the knowledge and technologies will be transferred to products, if needed through third parties (e.g. through open source libraries, knowledge transfer to companies with consulting and/or PhD hiring, IP contracts, start-ups, etc...).

340 characters left

Explain how you, as a single partner, intend to exploit the project results (e.g. new product, new service, licensing, etc.) and how the market(s) will be accessed (exploitation prospects and capability); current main markets and main customers, as well as planned exploitation plans and strategies are welcome whenever doable. For companies, focus on business prospects. For universities and research institutes, focus on how the knowledge and technologies will be transferred to products, if needed through third parties (e.g. through open source libraries, knowledge transfer to companies with consulting and/or PhD hiring, IP contracts, start-ups, etc...).

The information provided here should only contain elements that are relevant and related to the precise project scope

Note: the fields on main contributions, strategic importance and market access are crucial for the national funding agency to evaluate the chances for funding for the individual partners within the project. Please try to be as concrete as possible.

Note 2: Update the field to be in line with progress of the project by providing detailed exploitation steps taken up to reporting period and for the future.




Project reporting

Community website – Final submission




Progress report in 2015 (semester 2)

Project 13001 Sample Project 2
Created by Soo-Kyung Shin
Date created 10 Jun 2016
Documents 1

 Edit Progress report in 2015 (semester 2)

Documents **Project summary** Top 8 ERA Work package descriptions Evaluation

Documents

Final	Item	Type	Preview	Date added	Size
<input checked="" type="radio"/>	 ITEA 3 PPR template_Dec2017.docx 	Word 2007		Today 14:21	372 KiB

 Download Progress report in 2015 (semester 2)

Add documents to this report


Document name

Give a name for the document. If no name is given, the file name will be taken


File No file chosen

Upload here the documents required for the Progress report. The templates for the PPR reporting can be found in the [documents and templates](#) section.

The size should be between 20kB and 8MB

Do not forget to  make the PPR final once all updates and uploads have been made. Before marking this PPR as final do not forget to select the final PPR template excel by selecting the corresponding radio button.

PPR checklist

-  Partners whose reporting is missing (click on a partner to access its reporting page):
 - ITEA Office
 - Sample organisation

For any question or support regarding PPR:

Soo-kyung Shin (ITEA Programme support officer)
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+31 880 036 146

Thank you for your attention