

Defining Reporting Periods and Due Dates

Through **Proposal > Project > Report/Review Schedule** you can define the reporting periods if you have *Coordinator Rights*.

There are three types (levels) of reporting periods that can be defined along the project duration: Interim, Periodic and Resource reporting periods.

- *Interim reporting periods* e.g. monthly, bi-monthly, quarterly, half-yearly, every 9 months or yearly (optional)
- *Periodic reporting periods* e.g. half-yearly, yearly and every 18 or 24 months
- *Resource reporting periods* (optional, can be set at implementation stage)

During the Implementation Phase, *Coordinators* have access to the partners' reports on progress descriptions for each Work Package and Task per reporting period - Interim and Periodic - through **DoW > Project > Report/Review Schedule**. Partners also report the person-months they spent in the Interim reporting periods (default setting), unless specific resource reporting periods are defined (read more on this below).

For each of the defined reporting periods, you will be able to generate and download the *Interim* or *Periodic Reports* respectively (as DOCX) at the implementation stage. EMDESK will consolidate all reporting information reported within the reporting into one report.

Create the Reporting Periods

To create a default reporting schedule, please select the reporting intervals for the *Interim* and *Periodic reporting periods* and click **Create Schedule**.

Important: Please set the reporting periods before upgrading to the implementation stage.

If you have irregular intervals for reporting periods or you want to delete one of the reporting periods, please contact us at support@emdesk.com. We are glad to configure your individual schedule.

Note that once the project is switched to Implementation mode only the technical support can modify reporting periods and this may incur a small fee (especially if data has already been reported).

If you already know the start date of the project, you may also select the option **Calendar Dates** and enter the date into the field **Project Start Date** to enable the system to create a date-specific reporting schedule including the corresponding due date for completion.

Resource reporting periods are optional and should be used only if the periods for resource reporting differ from those of the Interim Reports. They can still be created at the implementation stage.

Due Dates of Reporting Periods

For each reporting period, you can set a due date. The due date refers to the final completion deadline for reporting relevant information on that reporting period. You can shift the due date to another date at any time within the project.

The due date is used by EMDESK to identify the active reporting period. The active reporting period is the one with the next upcoming due date. Reporting periods with past due dates are closed. The due date is also used as the deadline to notify collaborators (deadline reminder on completing interim or periodic reports).

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