## INSTRUCTION MANUAL

## TIMESHEET@UNIPD

# Integrated timesheet platform University of Padova

## Who is required to fill in the integrated Timesheet@Unipd?

The integrated Timesheet@Unipd must be filled in by all researchers/professors who are involved in European and/or International projects, requesting a reimbursement for their reported personnel costs.

## What is the integrated Timesheet@Unipd?

The integrated Timesheet@Unipd is an online platform with personal access, coordinated by the International Research Office, which allows the automatized insertion of the annual productive hours of those researchers/professors involved in European and/or International projects.

#### How must the integrated Timesheet@Unipd be filled in?

Researchers/professors must access the platform using their University Single Sign On.

Following the instructions in this manual they have to enter all hours worked during the relevant year (i.e. not only the hours worked for the European and/or international project in which they are involved).

### Why must the integrated Timesheet@Unipd be filled in?

Researchers/professors must fill in the integrated Timesheet@Unipd as there is the obligation set by the European Commision that costs declared must be supported by reliable time records.

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<sup>1</sup> MSCA FELLOWS Are you a MSCA Fellow or Supervisor? Look for the MSCA alert for quick information on how to work on your Timesheet@Unipd.

### INTRODUCTION

According to the regulations set up by the European Commission, in 2011 the Academic Senate and the Board of Administration of the University of Padova endorsed a template of integrated timesheet that satisfies EU requirements<sup>2</sup>.

The timesheet we refer to hereunder must be adopted by the University of Padova staff involved in all Horizon 2020 (H2020) and Horizon Europe (HEU) projects. As refers to the Marie Sklodowska-Curie Actions (MSCA), **Marie Sklodowska-Curie fellows** shall fill in only some sections, as specified throughout these guidelines.

#### THE TIMESHEET STEP BY STEP

The professor/researcher who acts as Supervisor of a H2020/HEU project for which the time reporting is required, **must contact the Timesheet@Unipd system Administrator** (International Research Office - <u>international.research@unipd.it</u>) to insert the project in the database. The following data will have to be **provided**:

- project full title,
- project acronym,
- project starting and ending date,
- Grant Agreement number.

In case of first-time access, a new user account will be created and an automatic e-mail will be sent to the Supervisor's institutional address containing the link for accessing the online application. Access will then be provided through SSO.

The professor/researcher who becomes Supervisor both of a H2020/HEU project and of an international / European project (outside H2020/HEU) will access the programme with the role of "**Principal Investigator**" and must enter:

- 1) the members (with the role of "**Researcher**") of the research groups of the projects for which she/he's Supervisor;
- 2) the other projects for which she/he is Supervisor (international/European projects outside H2020/HEU and/or internal/national projects);
- 3) the activities (called WP Work Packages) concerning all the projects for which she/he's responsible;
- 4) after entering all the WPs, she/he must associate herself/himself and each component of her/his research groups with the projects and the project WPs on which they work.

The completion of these operations **generates an electronic form (timesheet) where working/productive hours must be entered**. Registered timesheets can be continuously monitored

<sup>&</sup>lt;sup>2</sup> The obligation to keep time records for personnel involved in H2020 projects is provided by art. 6 and 18 of the Grant Agreement (G.A.). Evidence to prove the eligibility of personnel costs in HEU projects is provided by art. 20 of the G.A.

and printed out when necessary. The research group members will be enabled with the role of "Researcher" and they must:

- 1) insert any national/UNIPD project for which they are Supervisors;
- 2) insert the activities (WPs) concerning these projects by associating themselves with the WPs;
- 3) enter the hours worked for each project

If a user with the role of **Researcher** needs to enter a research group for a national/UNIPD project or acts as Supervisor of a H2020/HEU project or an international/European project (outside H2020/HEU), she/he must contact the Administrator as to insert the project and assign her/him the role of Principal Investigator; from that moment she/he will enter the programme with this new role. If a professor/researcher participates in a project of a colleague who does not need to fill in the timesheet and it is not included in the database, she/he can contact the Administrator in order to associate the project and the related activities (WPs) with her/his profile.

## **ROLES**

#### **ADMINISTRATOR** (International Research Office)

H2020/HEU projects are exclusively entered by the Administrator. When a H2020/HEU project is approved, the professor/researcher must contact the Admin (International Research Office - international.research@unipd.it) as to have the project entered in the Timesheet@Unipd platform and to activate the account of the Supervisor (role "Principal Investigator"), if it is her/his first time access. If a professor/researcher does not participate in any H2020 project yet still needs to record her/his productive hours on the Timesheet@Unipd system, she/he must ask the Admin to activate her/his account in order to register the other projects in which she/he's involved (international/European projects outside H2020/HEU and national/internal projects) so that she/he can properly report the hours worked.

#### The Administrator can:

- cancel a project or a WP wrongly entered;
- dissociate users (both P.I. and Researcher) from a project or from a single WP;
- change the name/association of a Principal Investigator if there is a change during the project due to retirement or transfer;
- change the role of a user from Researcher to Principal Investigator.

#### PRINCIPAL INVESTIGATOR (ALSO REFERS TO SUPERVISORS OF MSCA FELLOWS)

The professor/researcher who is Supervisor of a project (accessing with the role of "Principal Investigator") must:

- record all of her/his projects that are not H2020/HEU (international/European projects outside H2020/HEU and national/internal projects) for which she/he is Supervisor;
- enter the activities (WPs) of all the projects for which she/he is Principal Investigator;
- associate herself/himself with the WPs in which she/he is involved in each project;
- insert the research group members working in her/his projects (accessing with the role of "Researcher");
- associate the research group members (with the role of "Researcher") with the project and then with the single WPs in which they are involved within the project;

## **MSCA**

MSCA Supervisors (IF in H2020 and PF on HEU) who are exclusively involved in MSCA Actions (i.e. do not take part in other H2020/HEU, national and/or internal projects) have no obligation of time recording (**no timesheet** has to be filled in, printed, signed for them).

Such Supervisors are only required to record their MSCA project in the Timesheet@Unipd, enter its WPs, associate themselves with the WPs, insert the Individual Fellow working in the project as "Researcher" and associate him/her to the MSC Action.

- record the hours worked within the projects;
- **print** monthly and annual time reports and provide the necessary signatures on them;
- **sign the time reports** of her/his research group members.

#### **RESEARCHER**

Those who **are not** Supervisors/Principal Investigators of a H2020/HEU project or of an international/European project outside H2020/HEU, but who still collaborate in the activities of such projects, will be enabled with the role of "Researcher" and must:

The term "RESEARCHER" applies to MSCA FELLOWS, both Individual Fellows and PhD ITN (H2020), and Postdoctoral Fellows and PhD DN (HEU) as well as PhDs or post-docs recruited on ERC and other H2020/HEU projects.

## MSCA

 enter all national/internal projects for which she/he is Principal Investigator; This first step is not relevant for MSCA FELLOWS, as well as PhDs & postdocs recruited full time on a H2020/HEU project.

- enter the activities (WPs) of the projects for which she/he's not Principal Investigator;
- associate herself/himself with the WP(s) in which she/he is involved in each project;
- report the hours worked;
- print monthly and annual time reports.

If a professor/researcher with the role of Researcher must insert a scientific team for her/his national/internal project, she/he must contact the Administrator who will:

- enter the internal/national project;
- change her/his role from "Researcher" to "Principal Investigator".

The "Researcher" has now assumed the role of "Principal Investigator" and is able to insert her/his scientific team and proceed with the functions of a P.I.

## **HOW TO START**

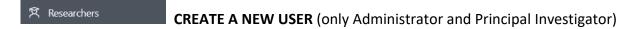
To start, access the following link: <a href="https://apex.cca.unipd.it/pls/apex/f?p=175">https://apex.cca.unipd.it/pls/apex/f?p=175</a> and access through SSO.



After the login, you are in the Timesheet@Unipd Home Page.



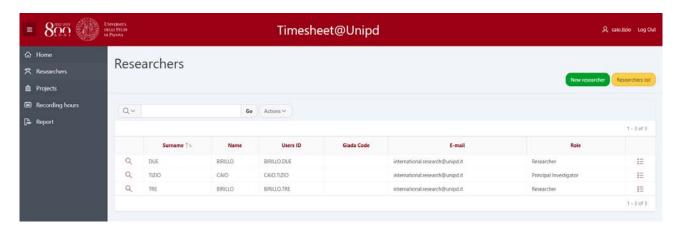
## **FUNCTIONS**



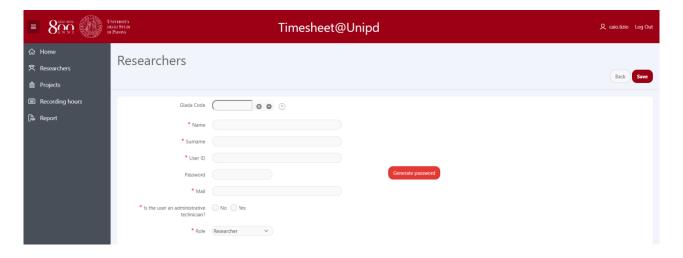
The "Researchers" function is used to add new users who are members of a Principal Investigator's research groups and to manage their profile as well. When accessing the "Researchers" section, a grid appears with the list of only those users who have been already associated with a P.I. project or with projects in which the P.I. participates with the role of Researcher. The list of all the users registered in the Timesheet@Unipd database can be consulted by selecting right.

Personnel participating in the projects can be entered in the database only by the Administrator (in case of "Principal Investigator" of H2020/HEU projects or other European/international projects) or by the Principal Investigator (in the case of personnel participating in her/his own projects with the role of "Researcher"), by selecting New researcher on the top right.

Users with the role of Researchers cannot enter other users with the same role of Researchers.



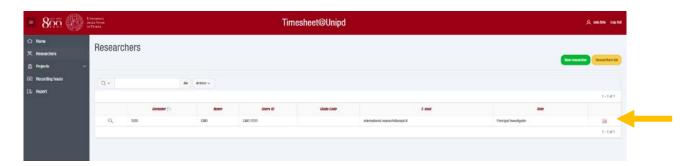
Before creating a new user, it is **necessary to check if the user is already present in the Timesheet@Unipd database**, by selecting Researchers list. Then select to add a new user and insert the info:



- 1. **Giada Code**: (only for University personnel) select the drop-down list, search for the User's name or surname to be entered and select it; then the Giada Code will appear automatically;
- 2. **Name**: type the user name (when she/he is an employee of the University, this appears automatically when the Giada Code is entered);
- 3. **Surname**: type the user surname (when she/he is an employee of the University, this appears automatically when the Giada Code is entered);
- 4. **User ID**: type your own USER, that must be NAME.SURNAME;

- 5. **Mail**: enter the user's institutional e-mail address (when she/he's an employee of the University, this appears automatically when the Giada Code is entered);
- 6. **Is the user an administrative technician (***personale tecnico-amministrativo***)?:** users can be administrative technicians (YES) or professors/researchers/post doc (NO);
- 7. **Role:** assign the role to the user (Principal Investigator or Researcher).

The new user will receive an automatic e-mail that will contain the link to access the timesheet. To view the User's projects and activities with which she/he is associated, select the symbol in the last column.



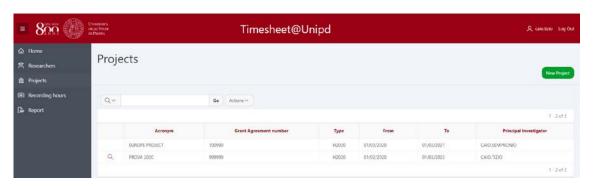
♠ Projects

**CREATE A NEW PROJECT** (for EU projects: only Principal Investigator)

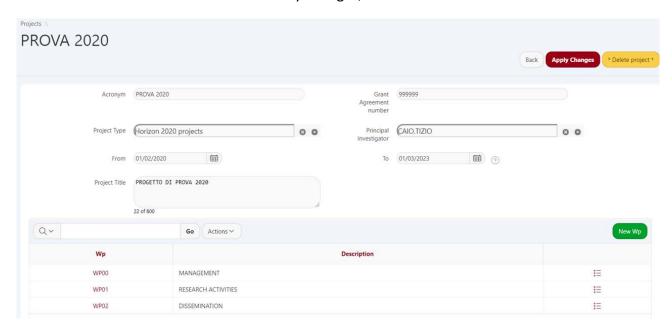
All projects must be entered only by the **Principal Investigator** of the project itself (or by the **Administrator**, that will immediately associate it with the P.I.) and she/he will be the only one in charge of editing or modifying it (title, dates etc.) and entering the WPs.

Users with the role of "Principal Investigator" can insert their own international/European projects (outside H2020/HEU) and national/UNIPD projects as well, while users with the role of "Researcher" can only insert their own national/UNIPD projects, whereas it is not necessary to include a team.

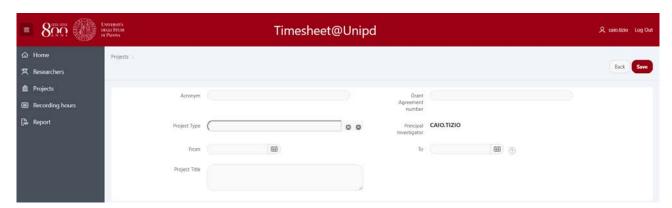
When accessing the "Projects" section, users see a grid with the list of all the projects with which they are associated (this is the list of all the projects in which they participate, either with the role of P.I. or as Researcher). When a user has the role of Principal Investigator in a project, the icon appears on the left to the project title; by clicking on it, the P.I. is able to have the project details displayed and to apply changes.



More on details, by clicking on the P.I. is able to check project data and WPs, modify them and insert new WPs. In order to confirm any changes, select Apply Changes.



To create a new project select New Project and enter the requested data:



- **1**. **Acronym**: type the acronym of the project or the project-type in the case of national/UNIPD project;
- **2. Grant Agreement Number**: enter the project number (that is the G.A. number for H2020 or other EU projects and any alphanumerical ID for national/UNIPD projects);
- **3. Project Type**: select the project type you are entering (Horizon2020 projects, Horizon Europe Projects, European and International projects outside H2020, National/UNIPD projects);
- **4. Principal Investigator**: the P.I. name is automatically entered by the system;
- **5. Project starting date:** type the project starting date or select it from the calendar:

**ATTENTION:** the "project starting date" <u>must be the first day of the month on which activities</u> <u>begin</u>. (Example: if the project starts on 14 November the date to be entered is 1 November). This date cannot be changed (except by the Administrator);

**6. Project ending date:** type the project ending date or select it from the calendar:

ATTENTION: the "project ending date" <u>must be the first day of the month following the end</u> <u>of the activities</u>. (Example: if the project ends on 17 or 30 November, the date to be entered is 1 December);

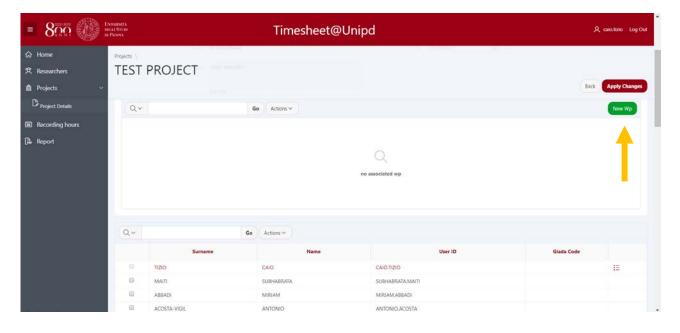
- 7. Project Title: type the project full title;
- 8. Select Save

Project Details

ENTER PROJECT WPs (for EU projects, only the P.I. has the authorization)

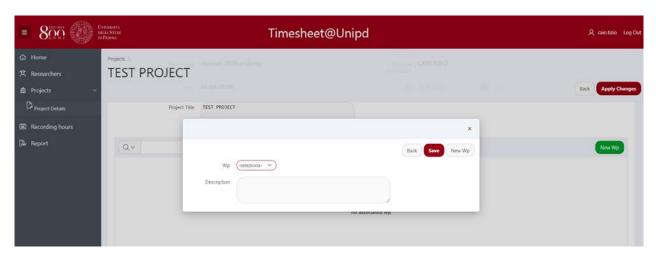
Once the project has been entered in the database, the Principal Investigator must define the project WPs (each project must include at least one WP³) and then associate both the project and its WPs with the personnel involved in the project and having the role of "Researcher". Personnel can be associated with the project and its WPs only if the project WPs have been previously entered in the system.

The screen appearing after a project has been created is visible below. If no WP has been entered, the message no associated wp appears.



<sup>3</sup> For those projects that do not include any WP in the Grant Agreement (<u>such as ERC projects</u>), it is recommended to enter a single WP named "Research activities".

In order to add a new WP just select New WP.



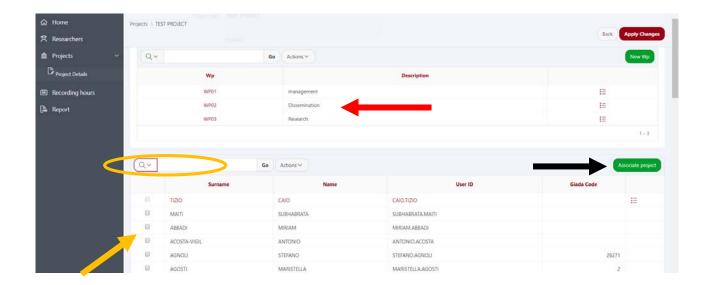
It is now possible to define and select the WP number and the WP description. Once the action has been completed, select to save changes and then been to end the entering or select below to add a new WP.

ASSOCIATE PROJECTS AND WPs WITH USERS (for EU projects, only the P.I. has the authorization)

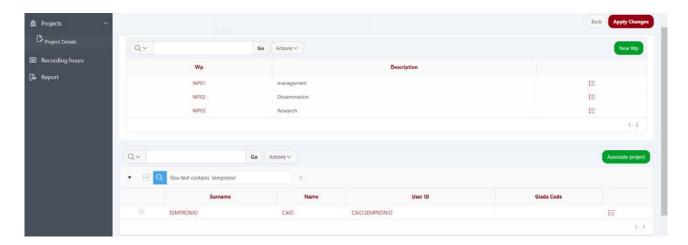
Once the WPs have been entered (see previous operation), they appear on the project detail display (see red arrow) with a new feature, that is Associate project (see black arrow). This feature allows the P.I. to associate herself/himself and other users (with the role of "Researcher") with the projects and WPs in which they are involved within the projects.

The Principal Investigator must associate herself/himself and the members of her/his research team with the projects and the WPs for each project she/he is the Supervisor.

Users to be associated with the role of "Researcher" can be selected either from the user list that appears in alphabetical order (see yellow arrow) or through the database search engine (see yellow circle), that appears under the WP list: after the user has been selected click on Associate project and the user association with the project is now complete.



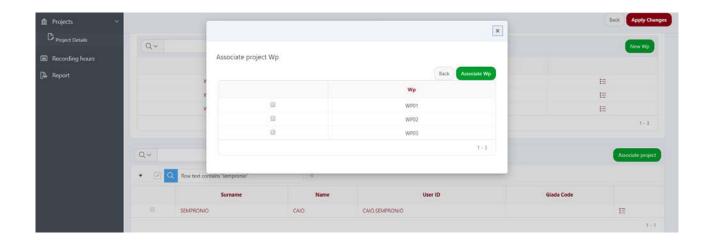
After the user has been selected with the role of "Researcher" and the association with the project has been completed, the project detail screen shows only those users who are associated with the project (both the Principal Investigator and the users with the role of "Researcher").



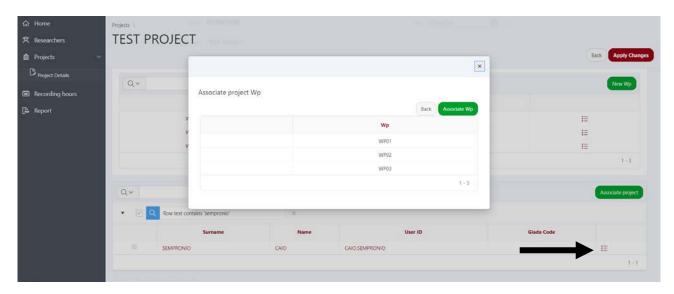
Once a user has been associated with the project, it is then possible to associate her/him with the different WPs of the project by selecting the icon [15] (see black arrow).



A screen appears with the list of the project WPs and the possibility of selecting and associating them to the user.



Now the user has been correctly associated with the project and with the project WPs. It is also possible to check which WPs have been associated with a user by selecting [15] (see black arrow).



# RECORDING HOURS

Accessing the "Recording Hours" section, the user is allowed to select the year and the month for which she/he must enter the hours.



After selecting the year and the month, a large grid appears, showing:

- in the first column, the activities other than the project ones, called "Standard activities" (Teaching activities, Institutional Activities, Basic Research/Networking), and also all the projects in which the professor/researcher is involved; the same project is reported as many times as the number of WPs in which the professor/researcher is involved. Since the Timesheet@Unipd is an "integrated timesheet", all the hours worked by the professor/researcher must be reported, including the "standard activities" that the professor/researcher is required to do. The definition of the three "standard activities" is shown in the legend that is at the top right of the page;
- in the second column, the WPs description for the projects in which the professor/researcher is involved;
- in the third column, the **WPs number**;
- in the following header lines, the days of the month for which the daily hours worked must be reported for each WP;
- in the last column the total amount of monthly hours for each activity/WP.



When the daily hours have been entered, select to validate the recording. The total hours of the selected month (**Total Month**), the total hours worked in the months preceding the selected one (**Total Year**), and the total hours referring only to European and international projects (**Total Month FP7**, **EI**, **H2020**, **HEU** and **Total Year FP7**, **EI**, **H2020**, **HEU**<sup>4</sup>) are summarized and displayed under the recording hours grid, as shown in the following image.



If you select a month for which the hours had already been entered in a previous session or a new month within the same session, in order to correctly display the total annual/monthly summary (see above), select save.

<sup>&</sup>lt;sup>4</sup> **FP7** (7th Framework Programme, 2007-2013); **EI** (European and international projects other than Horizon 2020: LIFE, COST, REC, DG JUSTICE etc.); **H2020** (Horizon 2020, 8th Framework Programme, 2014-2020); **HEU** (Horizon Europe, 9<sup>th</sup> Framework Programme, 2021-2027).

If a Principal Investigator or a Researcher is involved in several projects and WPs, she/he can select a single project and the related WPs by selecting the Projects/Other Activities button.

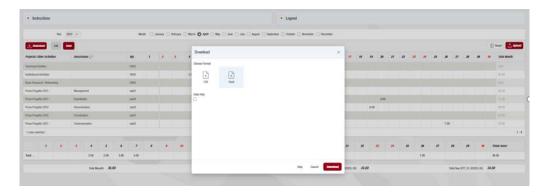


By selecting only the project of interest, the grid will only display the WPs of that project, in order to facilitate the entering of hours.



# UPLOADING OF AN EXCEL FILE

It is also possible to enter the hours of a selected month by uploading an Excel file containing the hours of that month. The user must select the icon download on the top left and the select the Excel file download.



The Excel file will then show the Projects, the WPs and the days within that month and will be ready to be filled. The hours must be entered manually using the format "H.00" or "0H.00".



In order to upload the Excel file, the user must select then displayed, with all the days of the selected month as well: in order to complete the data upload, simply select on the top right.





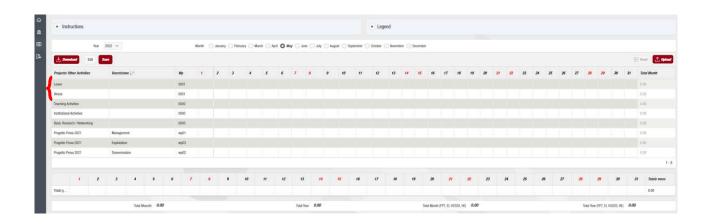
<u>Research fellows</u>: fellows carrying out their activities on international or national projects must fill in the timesheet as well, and they will be enabled by their Supervisor to access the Timesheet@Unipd and enter the hours with the role of "Researcher". In order to correctly access and use the timesheet they must follow the rules listed so far.

Important: research fellows who are contractually engaged for 100% of their working time on a project (as in the case of Marie Sklodowska-Curie fellows) must not report their working hours as "standard activities", since it is a category reserved only for permanent staff, as previously explained.



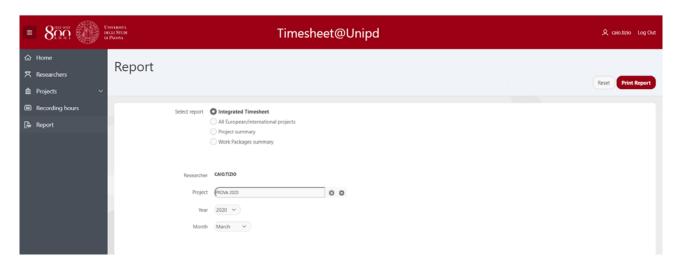
Research fellows specifically recruited for a project must therefore only report the hours worked on that project, unless differently indicated in their employment contract.

<u>Administrative staff</u>: the administrative staff involved in international or national projects is registered with the role of "Researcher". Two additional items appear in the grid: "Leave" and "Illness", so as to report the days of vacation (or parental leave) and illness, too.

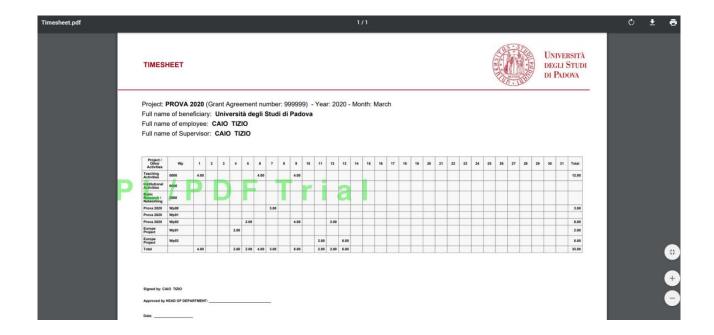




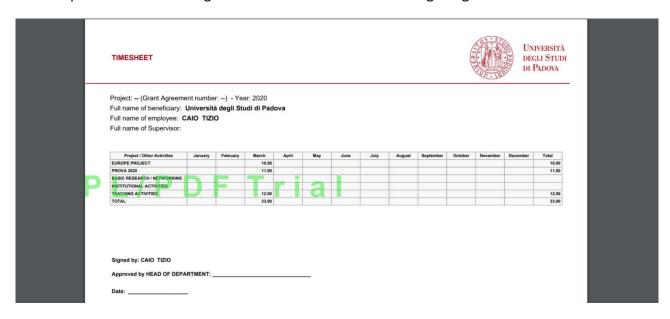
Once the hours have been entered, the Principal Investigator or the Researcher proceed with the printing of the monthly reports (and then of the annual report) by accessing the "Report" section. Four types of printable reports appear within this section: Integrated timesheet; all European/International projects; Project Summary; Work Package Summary. Once the report type to be printed has been selected, it is then required to select the project title, the year and the month of interest; then select



1) Integrated timesheet: this report represents the real "integrated timesheet". In fact, in this report both the hours worked on all the projects and the hours worked on "standard activities" are fully reported and visible. It is the type of timesheet that must be actually produced for the project reporting. The professor/researcher must print a report for each month of the year and also an annual report as a summary for each project year. An example of a monthly integrated timesheet is in the following image.



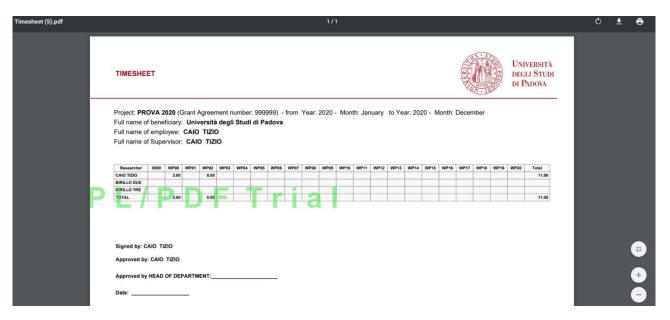
An example of an annual integrated timesheet is in the following image.



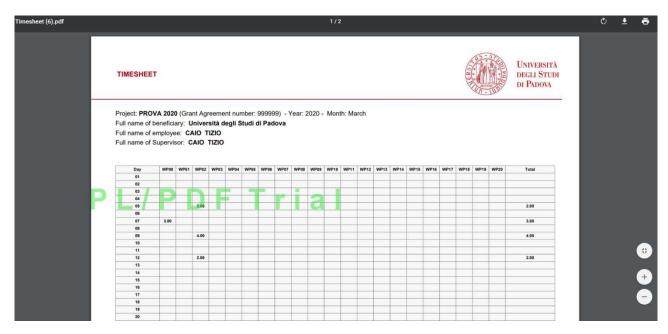
2) All European/International projects: this type of report shows exclusively the activities that are related to European and international projects. The "standard activities" therefore do not appear. The annual report here is useful for monitoring the compliance with the maximum number of annual hours that can be reported on European projects (1720 hours).



**3) Project Summary**: this is a sort of project "**summary**" allowing the P.I. to **check the hours worked on a project by each member** of the team for a specific period.

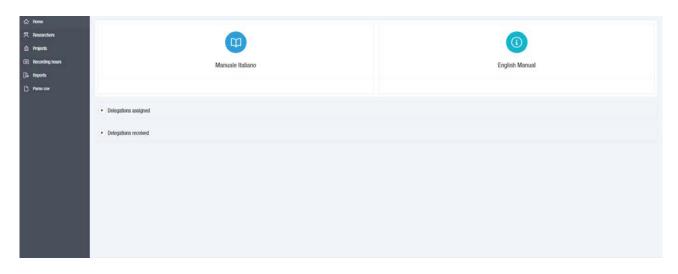


**4) Work Packages Summary**: by printing this report the P.I./Researcher is able to view her/his hours worked on a project **broken down by each WP project**.

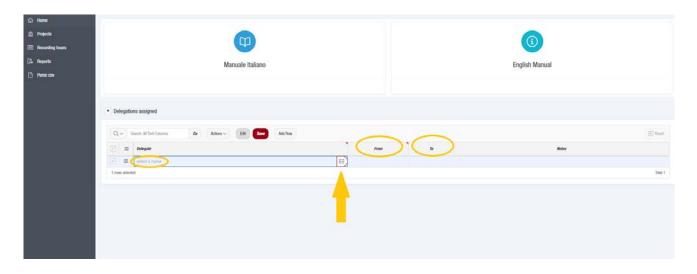


## ⊕ Home DELEGATIONS

Each user can delegate another user to access his/her own Timesheet profile. The delegated person will have a full capacity within the delegator's profile.



Select Delegations assigned to **assign a delegation**. The following image will be displayed, showing the delegations previously assigned and allowing new assignments.



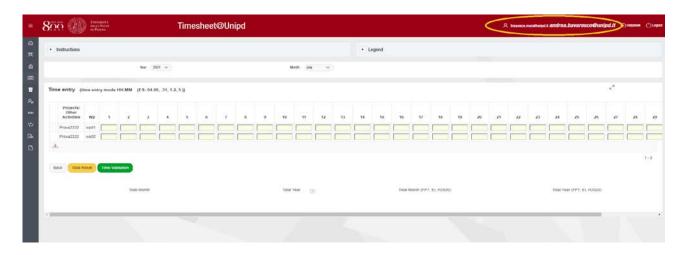
In order to assign a new delegation, the user must select and then enter the surname of the delegate. The user is asked to indicate the starting date of the delegation, while it is not mandatory to indicate the ending date: the delegator can indicate or modify the ending date at a later time.

**ATTENTION!** The delegation validity can be terminated by changing its ending date, **but in no case will it be possible to delete the evidence of a delegation that was previously assigned**, that is displayed within the Delegations assigned as to certify that a delegated person had legitimately operated in the Timesheet profile of the delegator during the reference period.

Select Delegations received to display the delegations received and to access the delegator's profile.



Selecting the user can access the delegator's profile. The delegated user (delegate) is then redirected to the section of the delegator.



The delegator's profile, for which the delegate is operating, appears in bold at the top of the page.

To switch out, go back to the Home Page, select

Delegations received and then Sign out

# Restore

#### WHO SIGNS THE TIMESHEET

**The monthly report** must be signed by the professor/researcher who recorded her/his own hours worked and by the Principal Investigator of the project; the Principal Investigator's report must also be signed by the Head of the Department. If the P.I. is the Head of the Department, the report must be signed by her/his Deputy (*Vice-Direttore*).

**The annual report** must be signed by the professor/researcher who recorded her/his own hours worked and by the Head of the Department. The report of the Head of the Department must be signed also by her/his Deputy.

As required by the European Commission, all the reports must always be signed by a "supervisor" (Principal Investigator/Head of the Department).

#### **CONTACTS**

Contact the Administrator (International Research Office) to enter the Horizon Europe projects, for the P.I. first access and for any other problem or information:

#### **International Research Office**

Via Martiri della Libertà, 8 – Padua, Italy

e-mail: international.research@unipd.it | Phone: +39 049 827 1940