



ADVANCED PHOTONIC PROCESSES FOR NOVEL SOLAR ENERGY HARVESTING TECHNOLOGIES

Factors considers for an efficient filling system in your organization: Examples of timesheets



OUTLINE



- Efficient Document Filing Systems
- Effective Timesheet Management
 - Practical tips, recommended tools, EU-specific requirements



Why Organized Filing is Critical for EU Projects

- Quick access to contracts, deliverables, invoices
- Audit readiness – prove implementation and costs
All participants must keep records and other supporting documentation to prove proper implementation and costs claimed”
- Speeds up reporting and reduces errors when preparing financial or progress reports
- Supports collaboration and knowledge sharing among partners

Standardized Structure & Naming Conventions

- Define Logical folder hierarchy (Project > WP > Task > Date) – consistent across the consortium
- Use clear, consistent filenames (include project acronym/ID, WP number, date, version) – e.g. PROJ123_WP2_DataAnalysis_v1.0.docx
- Document your naming scheme (e.g. a one-page guideline) so all team members use the same format

Centralized Storage & Access Control

- Store documents in one central system (e.g. SharePoint/OneDrive, Google Drive, Nextcloud) accessible to all partners
- Assign appropriate permissions/roles (Coordinators have full edit, partners have access to their tasks)
- Use project management or DMS platforms with built-in filing (OpenProject, FP-Tools, eMDESK)
- Enable version control or maintain a changelog so past versions are recoverable

Metadata, Indexing & Search

- Tag key documents with metadata (project acronym, WP, year, keywords) in your DMS or even in filenames
- Take advantage of full-text search in modern platforms (e.g. SharePoint search, Nextcloud search) to find files fast
- Maintain a simple index (e.g. spreadsheet of major deliverables and where to find them) as a “master list”
- For research outputs, deposit data in repositories (Zenodo, OpenAIRE’s ARGOS) with DOIs; include links in your filing system

Security, Backup & GDPR

- Protect sensitive data: use encryption, strong passwords, and two-factor authentication on storage systems
- Ensure GDPR compliance: store personal data only when necessary and limit access (use secure platforms)
- Regularly back up the repository (both cloud versioning and offline copies) to prevent data loss
- Monitor access logs if available to track who viewed/edited important files

Record Retention & Audit Readiness

- Save all supporting docs (timesheets, invoices, travel receipts, contracts, meeting minutes) labeled with project info
- EU rule of thumb: keep records at least 2 years after the final payment (often longer if National rules apply)
- Organize an “Audit Binder” or digital audit folder: a checklist of required docs and where they are stored
- After each reporting period, archive that period’s final files (e.g. /Archive/Year1/) to clean up active folders

Section 2 – Efficient Timesheet Management

- Accurate effort reporting is essential for financial compliance and project monitoring
- Will cover EU-specific rules (e.g. Horizon Europe), best practices, and tool recommendations

Why Accurate Timesheets Matter

- Personnel costs often make up a large part of EU project budgets
- Timesheets provide the basis for claiming staff effort and justifying the funds request
- Ensure transparency: auditors will verify that claimed days match actual work
- Helps project managers monitor effort vs. plan and adjust allocations

EU Requirements for Timesheets

- Horizon Europe Art.20: must use “reliable time records” or monthly signed declarations (see EC template)
- Time records must be dated and signed at least monthly by the person and supervisor
- Minimum info: project acronym/ID, beneficiary name, year, person’s name, days worked, signatures
- If digital: system must allow electronic validation (login) and maintain an audit trail

Daily Practices & Accuracy

- Daily Entries: Update the timesheet every day (or week) to avoid missing data
- Ensure all claimed time is actual work (don't count weekends, sick or vacation days)
- Describe tasks/WP contributions clearly on the timesheet for traceability
- Managers should review and sign off on entries promptly each month

Timesheet Tools & Automation

- Use a time-tracking tool (digital record = easier audits): e.g. eMDESK (tailored for Horizon EU)
- Free/Self-hosted options: Clockify, Toggl, Kimai, Odoo Timesheet – ensure export of logs for backup
- For PM platforms: consider Jira+Tempo plugin, OpenProject, or even dedicated ERP timesheets (Odoo Community)
- Enable automated reports: many tools can summarize hours by WP, highlight unapproved entries, and export to Excel/PDF

Integrating Timesheets with Monitoring

- Link timesheet entries to project tasks/deliverables in your PM tool (e.g. Gantt chart, Jira issues)
- Use timesheet reports to update effort spent vs. baseline (dashboards or Excel pivots)
- Monitor budget burn: compare claimed person-days to planned person-months in each period
- Regularly review discrepancies (e.g. if much more/less time logged than planned, investigate)

Summary & Resources

- Filing: Consistent folder structure and naming (reflect WP/task/date) save time; central, secure storage with backups is essential.
- Records: Keep all evidence (timesheets, receipts, deliverables) and retain for audits.
- Timesheets: Log effort daily, get monthly sign-off, use EC template or reliable software.
- Tools & Templates: Many free/EU-friendly tools exist (links below); always ensure they meet EC requirements (audit logs, signatures).
- Next Steps: Review your current system against these best practices; train team on any new tools or procedures.



APPROACH

THANK YOU

