



How to create, upload & send an Annual Summary Report for EBF, ERF, EIF and RF?

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Purpose of this functionality

This functionality enables Member States (MS) to create, validate and submit Annual Summary Reports (ASR) for EBF, ERF, EIF and RF to European Commission (EC) officials.

Regulation source

Submission of Annual Summary Reports:
EC Regulation 1995/2006 of 13 December 2006
Amended EC Regulation 1605/2002
Commission Regulation 478/2007

Concerned Funds

EBF	ERF	EIF	RF
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User roles and permissions needed

Member State Responsible, Audit and Certifying Authorities (MSRA, MSA, MSCA U+S)

Before submitting the Annual Summary Report, please check that...

The Annual Summary Report has been duly signed by the authority appointed by the Member State.

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1. Create, upload & send an Annual Summary Report

The Annual Summary Report covering the financial year X is to be submitted by February 15 of the year X+1. It does not replace the annual control reports and audit opinions for each Annual Programme concerning the SOLID Funds, as provided for by the basic act of each Fund.

It can be created by the one of the three MS SOLID Funds Authorities:

- Responsible Authority (MSRA),
- Certifying Authority (MSCA) or
- Audit Authority (MSAA).

Step by step

1. Go to the STRATEGIC PLANNING > ANNUAL SUMMARY > STANDALONE DOCUMENTS menu.

The search pane appears.

The screenshot shows the SFC2007 application interface. At the top, there is a header with the SFC 2007 logo and the text "System for Fund management in the European Community 2007-2013" and "ERDF/CF, ESF, EAFRD, EFF, IPA, EBF, EIF, ERF and RF". A language dropdown menu is set to "English (en)". Below the header is a navigation menu with tabs: "Strategic Planning", "Programming", "Execution", "Audit", "Closure", "Anti-Fraud", and "Utilities". The "Annual Summary" tab is selected, and the "Standalone Document" sub-tab is highlighted. Below the navigation menu, the text "Welcome to the SFC2007 application" is displayed. Below this, step 2 is shown: "2. Click on [Upload a new Document](#)." The screenshot shows the "Upload a new Document" link highlighted with a red box and a mouse cursor. Below the navigation menu, there is a search pane with the following fields: "Type:", "Document Title:", "Attachment Title:", "Document Date:", "Sent Date:", "Language:", and "Member State:". Each field has a corresponding "Show?" checkbox, all of which are checked. There are "Search" and "Clear" buttons at the bottom of the search pane. Below the search pane, there is a "List of Documents" section with the "Upload a new Document" link highlighted with a red box and a mouse cursor.

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3. Select 'Annual Summary' in the 'Type' drop down list and fill in the document details, in particular the yellow fields which are mandatory.

Document Details

Type: Annual Summary

Title: [Yellow field]

Document Date: [Yellow field]

Language: [Yellow field]

Commission Registration No.: [Empty]

Local Reference: [Empty]

Comments: [Text area]

4. Click on SAVE.

Document Details

Type: Annual Summary

Title: Annual Summary Report

Document Date: 26/06/2012

Language: English

Commission Registration No.: [Empty]

Local Reference: [Empty]

Comments: [Empty]

Attachments

There were no results found.

Title	Filename	Link	Upload Date
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Save Cancel

5. The 'Year covered by the Annual Summary' drop down list appears. Select the respective year (1) and click on SAVE (2).

Document Details

Document is not yet sent

Type: Annual Summary

Title: Annual Summary Report

Document Date: 26/06/2012

Language: English

Commission Registration No.: [Empty]

Local Reference: [Empty]

Comments: [Empty]

Year covered by the Annual Summary: [Dropdown menu]

Attachments

There were no results found.

Title	Filename	Link	Upload Date
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Add a new Attachment

Save Cancel

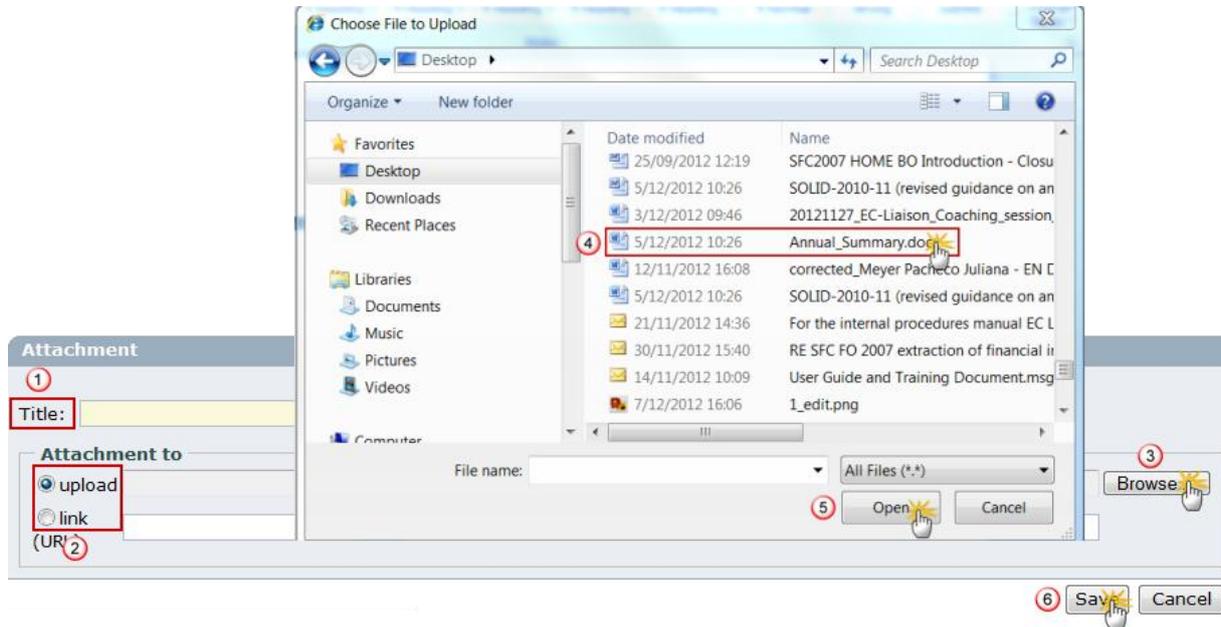
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The fields 'Commission Registration N°', 'Local Reference' and 'Comments' are optional.

6. Click on [Add a new Attachment](#).



7. Enter the name of the report in the 'Title' field (1), tick the type of attachment to be uploaded (2), click on **BROWSE** (3) to select the location of the file and, after having chosen it (4), click on **OPEN** (5) to launch the upload. Record the operation through the **SAVE** button (6).



8. Click on **SEND OFFICIAL DOCUMENT**.

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SFC2007: System for Fund management in the European Community 2007-2013
How to create, upload & send an Annual Summary Reports for EBF, ERF, EIF and RF?

Document Details

Document is not yet sent

Type: Annual Summary
Title: Annual Summary Report
Document Date: 26/06/2012 Language: English
Commission Registration No.: Local Reference:
Comments:
Year covered by the Annual Summary: 2008

Notification Details

Disable Automatic Notification
Comments:

Attachments

1 results found, displaying 1 to 1 Page(s): 1 Item(s) per page: 5 Show all

Title	Filename	Link	Upload Date
Annual Summary Report	Annual_Summary_upload.doc		26/06/2012

[Add a new Attachment](#)

[Send Official Document](#) [Save](#) [Cancel](#)

As a confirmation of the submission, the system generates the **Transaction Successfully Completed!** message to indicate the report has been sent.

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2. General

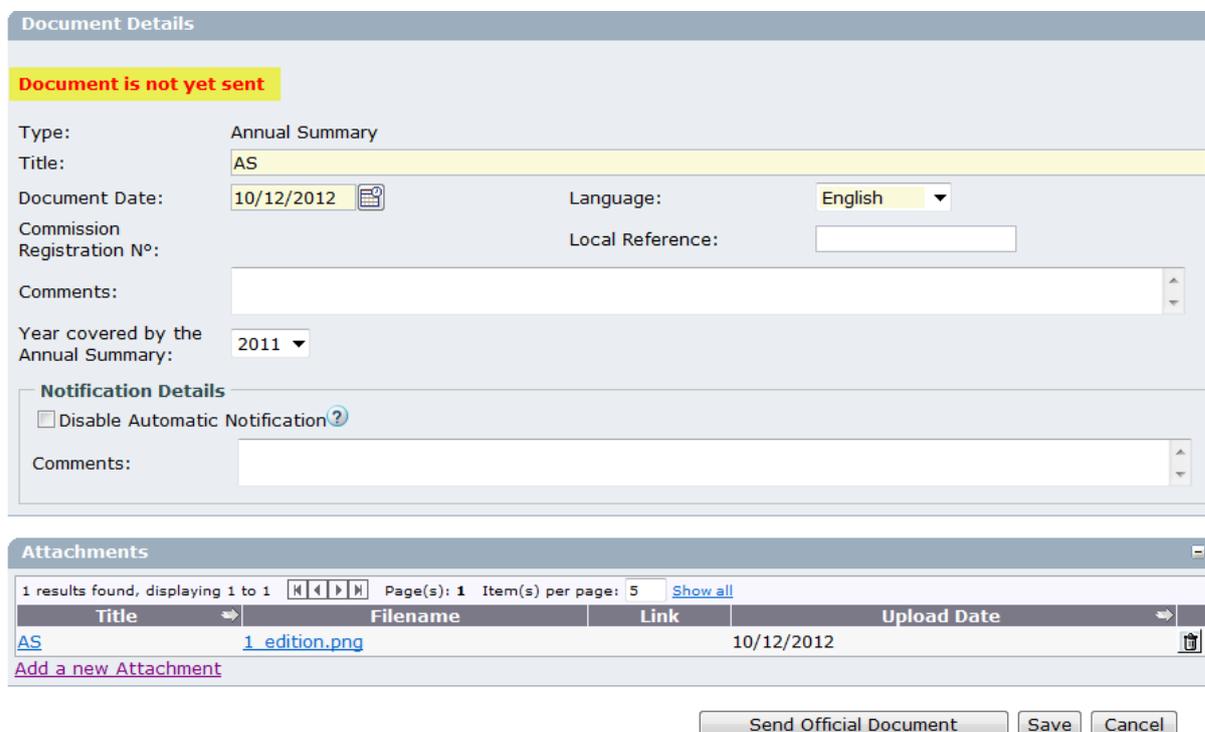
2.1. Deletion of uploaded documents

If a wrong document has been uploaded, it can be deleted through the  button. If applicable, restart the operation to upload the correct file, as explained in step 0.



2.2. Send, save or cancel a report

When an Annual Summary Report is downloaded into the system, the mention 'Document is not sent yet' is displayed.



Document Details

Document is not yet sent

Type: Annual Summary
Title: AS
Document Date: 10/12/2012 Language: English
Commission Registration N°:
Local Reference:
Comments:
Year covered by the Annual Summary: 2011
Notification Details
 Disable Automatic Notification
Comments:

Attachments

Title	Filename	Link	Upload Date
AS	1_edition.png		10/12/2012

[Add a new Attachment](#)

If the button is used, it is submitted to the EC and the 'Sent Date' is displayed accordingly. The report can no longer be deleted from the system.

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Title	Type	Language	Attachments	Document Date	Sent Date	
Annual Summary for Estonia (2008)	Template for Annual Summary	English	1	29/01/2008	29/01/2008	?
AS	Annual Summary	English	1	10/12/2012	10/12/2012	?
AS TEST	Annual Summary	English	0	10/12/2012		?
Annual Summary	Annual Summary	English	2	10/12/2012		?

If the **Save** button is used, the report is not submitted to the EC. It can be opened and dispatched at a later stage or, it will remain unsent in the system.

If the **Cancel** button is used, the report is not submitted to the EC and the **Transaction Cancelled!** message is returned by the system. It can be opened and dispatched at a later stage or, it will remain unsent in the system.

In both cases, the Annual Summary report can be deleted through the  button.

Title	Type	Language	Attachments	Document Date	Sent Date	
AS	Annual Summary	English	1	10/12/2012		?
AS TEST	Annual Summary	English	0	10/12/2012		?
Annual Summary	Annual Summary	English	2	10/12/2012		?
Annual Summary for Estonia (2008)	Template for Annual Summary	English	1	29/01/2008	29/01/2008	?

2.3. Mandatory fields

The mandatory fields are highlighted in light yellow (e.g. **Language:** ). If any obligatory field is left blank, the system refuses to proceed and displays the warning  sign.

2.4. Automatic notification

When the 'Disable Automatic Notification' box is left unchecked, the submission of the Annual Summary Report triggers the generation of an automatic notification. This email is sent to the mailbox of all EC users (recipients) subscribed to receive information on the submission of this document type.

Notification Details

Disable Automatic Notification ?

Comments:

When this box is checked, no information is sent to these recipients mailboxes.

Notification Details

Disable Automatic Notification ?

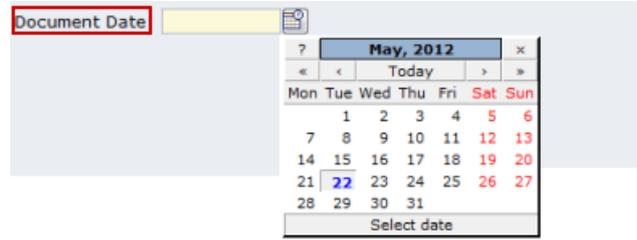
Comments:

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2.5. Document dates

When uploading a document, the 'Document Date' field can be completed in 3 different ways:

- manually, by following the format 'dd/mm/yyyy',
- with a double-click in the field to have the current date entered automatically or
- by clicking on  to open the calendar window to select the corresponding date.



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