ERASMUS+
CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

Mobility Tool+

User Guide

Version 3.0: 02.02.16

BRITISH COUNCIL ECORYS Erasmus+

Erasmus+ is the European Union programme for education, training, youth and sport.
The Erasmus+ UK National Agency is a partnership between the British Council and Ecorys UK.

Introduction

This guide has been produced by the UK National Agency (UK NA) to help users of the Mobility Tool+ (MT+) under the European Commission's Erasmus+ programme. MT+ was launched in September 2014 following adaptation from the Mobility Tool used for Erasmus and Leonardo Mobility projects under the Lifelong Learning Programme (LLP). For information about using MT+ for LLP projects please refer to the existing user guides for beneficiaries. The UK NA will continue to update this guide following any changes made by the European Commission to MT+.

The MT+ is the online management and reporting system for all projects under the European Commission's Erasmus+ Programme. It has been developed by the European Commission and it is a contractual requirement for all Key Action 1 (KA1), Key Action 2 (KA2) and Key Action 3 (KA3) projects to use the tool in order to report their project activities to the UK NA.

This will include identifying participants and flows, recording partner meetings, completing and updating budgetary information as well as generating, completing and submitting reports to the UK NA.

Throughout this guide there are links to other documents which you will need to refer to during your project.

This version of the guide supports the first release of the MT+. The full functionality of the MT+ will be introduced throughout 2015 and this guide will be updated to support the additional features. Any changes between versions will be detailed in the table below.

This guide complements the Mobility Tool+ Guide for Beneficiaries of the Erasmus+ programme.

ERASMUS+
CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

Summary of changes from Version 1:

Version number	Details	Date made
1.1	Removal of 'generating participant reports' on page 29 under 'Key Action 3 – Introduction'.	28 January 2015
2.0	**KA1:** Added Import/Export, Budget, and Reports sections. Amended Project Details section to include 'History Information'; Contacts section so change imported contacts and access to MT+; Mobilities section to include guidance for populating distance band dropdown menu and added information about linguistic grant to replace OLS for 2014 Round 1 VET projects. **KA2:** Added Organisations and Contacts sections. **KA3:** Added Organisations, Contacts, Mobilities, Import/Export, Budget, and Reports sections.	18 May 2015
3.0	**KA2 :** Updated Details, Organisations, Contacts. Added Project Management and Implementation, Transnational Project Meetings, Intellectual Outputs, Multiplier Events, Learning, Teaching and Training Activities, Special Needs Support, Exceptional Costs, Exceptional Cost Guarantee, Budget, Reports	2 February 2016

Contents

ECAS Requirements

In order to log in to MT+ you need to have an 'ECAS' account. The European Commission Authentication System (ECAS) is a service which allows users to access digital systems developed or used by the European Institutions. Please follow the instructions below to sign up for your ECAS account.

Before registering, please note the following important information:

- Please ensure that you have provided the National Agency with the correct contact person before registering on the ECAS service and MT+. This information will have been provided in the application form submitted to the UK NA and confirmed at contracting stage. If you believe that the contact person has changed since contracting stage, or you are not sure, **please check with your project officer at the UK NA.**

- Please ensure that the contact person registers on ECAS. In order for you to gain access to your project details on MT+, the email address provided when registering **must** be the same as the email address in the UK NA's records. If you are in any doubt, please check with your project officer at the UK NA. This is particularly important if you have more than one current email address.

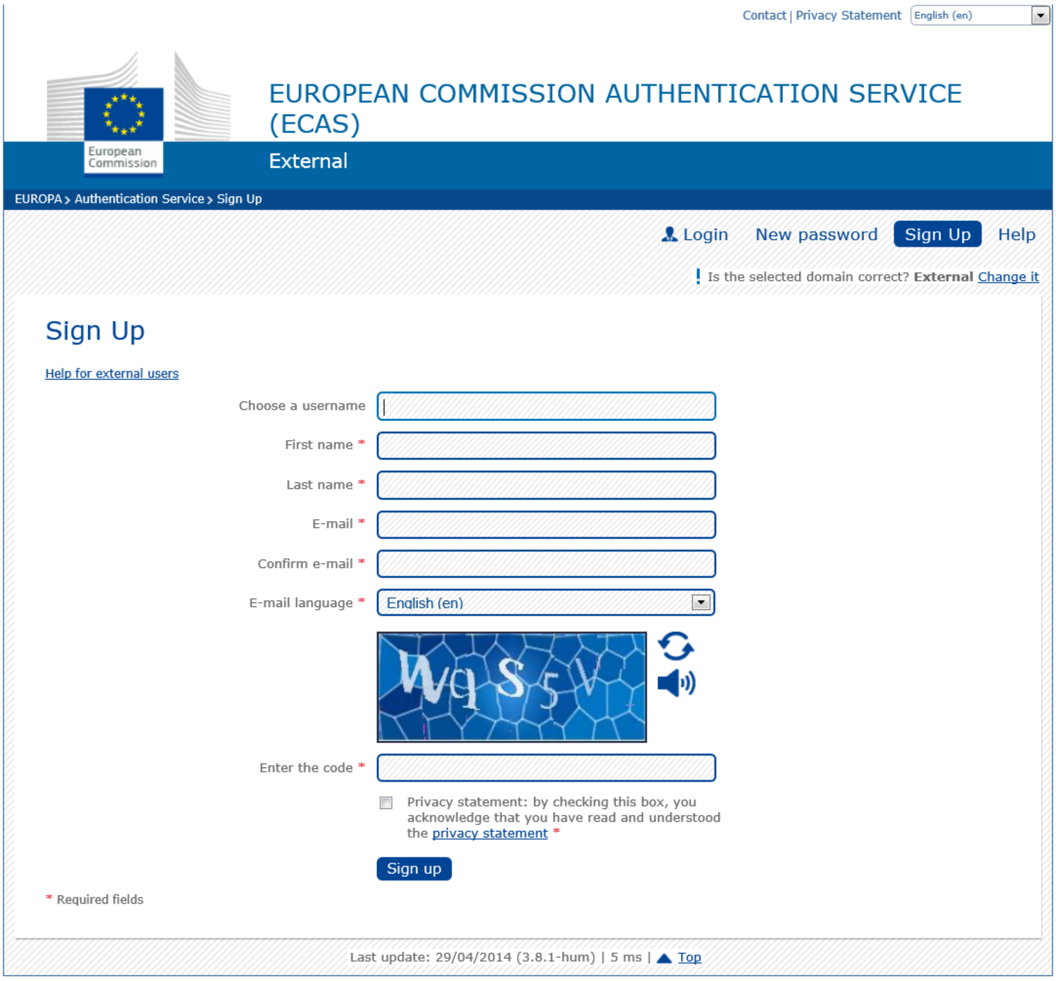
Registering on ECAS

1. Open the following link: https://webgate.ec.europa.eu/cas/eim/external/register.cgi to access the registration page to enter your details.

Please ensure that you

- complete all mandatory fields (marked with an asterisk *);
- read and accept the privacy statement by checking the box; and
- complete the security check by typing in the characters on screen. If the characters are not clear enough, click the icon to try a different image or click the icon for an audio version

The screenshot below shows the registration screen:



Once you click the ‘Sign up’ button, an automatic email will be sent through to the email address you used to register.

2. Your automated email will contain details of your username, and a link to create your password. It is compulsory to create your password within 1 hour 30 minutes of receiving the email, and so it is recommended that you complete this task straight away.

If you are required to specify your Domain Name when completing the form, you should ensure that you choose ‘External’. Further guidance for registering with ECAS is available on the **Erasmus+ website.**

Once you have registered on ECAS and set up your password, you will be able to log in to MT+ using the following URL address: **https://webgate.ec.europa.eu/eac/mobility**

In order for you to be able to log in and update your project details, you will receive an automated email from MT+. Only when this is received will you have full access to MT+.

ERASMUS+
CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

Key Action 1

Introduction

For Key Action 1 you will need to update the MT+ with information regarding your project activities. It is your responsibility to ensure that the information is accurate, up-to-date and in line with your grant agreement ensuring that any variations from this have been approved in advance by the UKNA. You'll need to update the MT+ with information regarding the mobilities for each participant including information about the budget spends to date. You will need to ensure that each participant completes a feedback report at the end of their mobility and you can use the MT+ to monitor this. You will also need to complete a beneficiary report at the end of your project which will be downloaded from the MT+, completed and then submitted back on to the MT+. The information about your project is broken down into different sections in the MT+ which you can navigate between by using this toolbar which is at the top of the screen:

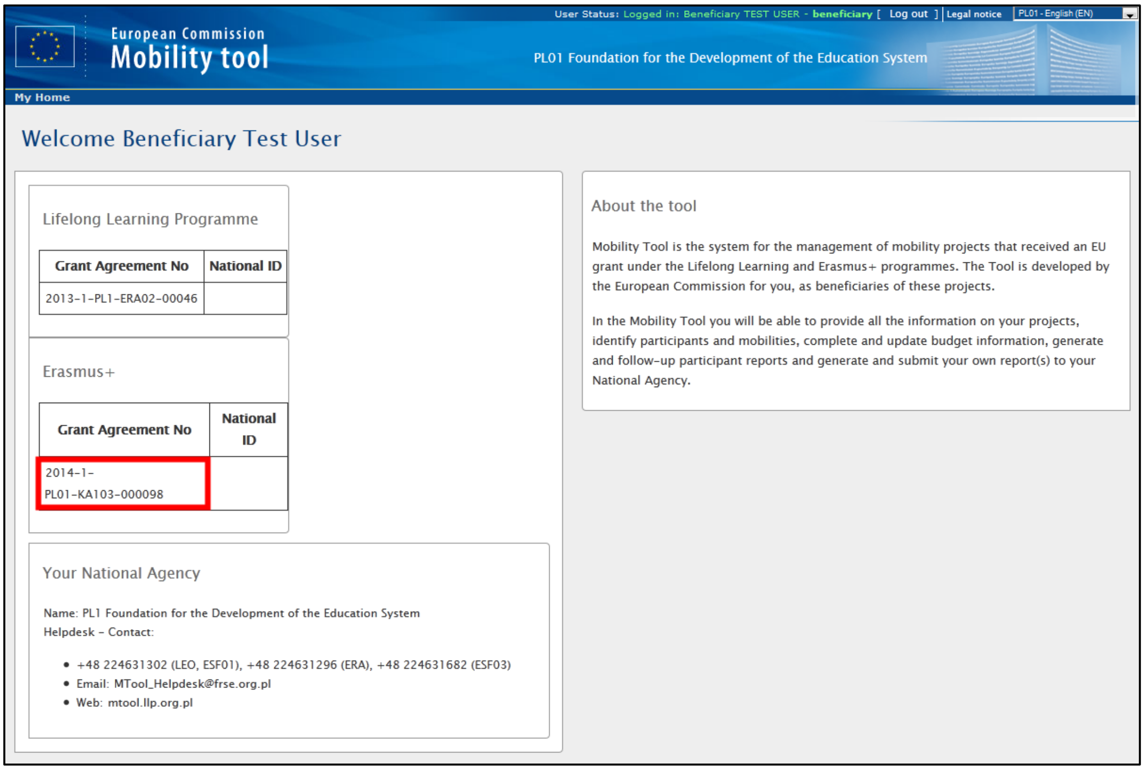
The information covered in each section of the MT+ is explained below:

Section	Description
Home and Project List	Display a list of projects for your organisation for which you are the contact person
Project Details	Display basic information about the project
Organisations	Display a list of organisation involved with the project which you can amend if necessary
Contacts	Display a list of contacts involved with the project which you can amend if necessary
Mobilities	Display a list of mobilities, input new mobilities and budget information
Budget	Display the budget for the project (not covered by this version of the guidance)
Reports	Display information about the reports for the project (not covered by this version of the guidance)

Project Details

When you log in to the MT+, and click on ‘Projects’ you will see a list of projects for your organisation. If your organisation had projects under the Lifelong Learning Programme you will see these as well as any Erasmus+ projects. If you have more than one Erasmus+ project, you can identify your Key Action 1 projects by the grant agreement number. All Key Action 1 projects have ‘KA1’ in the grant agreement number.

You can click on a project's ‘Grant Agreement No.’ to see the project details. If you have a lot of projects you can quickly find an individual project using the in-built search function in your browser by pressing ‘Ctrl’ and ‘F’ on your keyboard and typing the grant agreement number. This project will then be highlighted.



Once you have clicked on your grant agreement number, basic information regarding this project will be on the screen (as shown below), and there will be a toolbar with options to navigate through your project information. This toolbar is for easy access to different sections and will stay in place throughout all sections.

Context – This section holds a basic overview of your project details, such as which key action you have applied under, and in what year.

Project Information – This section displays specific information regarding unique coding for your project.

Beneficiary Organisation – This section displays information based on the lead organisations details.

History Information – This section displays information regarding when your project was created in MT+ and when it was last updated.

Organisations

From the organisations section of MT+ you can see a list of organisations that are taking part in the project. This section of the guide covers how to access the list of organisations and how to amend this information.

List Organisations

Available Features

	Select all organisations in list
	Add new organisation
	Delete selected organisation
	Export list of organisations as Excel/CSV file.
	Print list of organisations
	Add/remove columns from list
Search:	Search for information in the list
	Reset filters and/or clear search results
	Edit organisation information

After logging in to the MT+ and accessing the relevant project you will need to select the 'Organisations' tab from the toolbar and choose 'List Organisations'. This will display a list of the organisations involved with the project and some basic information, such as the name, PIC and country of each organisation. Your organisation will be marked as the beneficiary. To view the full details for an organisation, click the ‘Legal Name’ of the organisation. This will display information about the organisation and its contact details. When you first access a project in MT+ all the organisations that were included in the original application form and confirmed during the contracting stage will have been automatically uploaded.

Create New Organisation

MT+ has the facility for you to add new organisations and amend or delete organisations that are already included in the project. You **should not** use the features to add or delete organisations unless advised to do so by your project officer. If you add an organisation to the MT+ which is not included in your grant agreement, **all associated costs to this organisation will be deemed ineligible**.

To amend the information regarding an organisation, go to the list of organisations and click the icon for the relevant organisation. A partner details form will appear with fields relating to organisation information, address and contact information, and comments. You’ll notice that the majority of the fields are grey and cannot be manually changed. The table shows which fields you can edit manually and which fields will be updated from the Participant Portal.

Field	Description	Update from Participant Portal	Update Manually
PIC	The Participant Identification Code from the Participant Portal. This is unique for each organisation.		✓
Organisation ID	The unique identifier for an organisation in the MT+. This is automatically generated but can be manually changed.		✓
Legal Name	The legal name of the organisation in Latin characters.	✓	
Business Name	The trading name of the organisation. This may be different to the legal name.	✓	
Full legal name (National Language)	The legal name of the organisation in the National Language in which it’s based.	✓	

Field	Description	Update from Participant Portal	Update Manually
Acronym	The official acronym of the organisation.		✓
National ID (if applicable)	The business registration number or other national identifier of the organisation.	✓	
Department (if applicable)	Please enter the department in which your organisation sits		✓
Type of Organisation	A dropdown menu for the ‘legal form’ of the organisation	✓	
VAT	The Value Added Tax (VAT) number of the organisation.	✓	
Co-Beneficiary	Other organisations within the UK consortium		✓
Public Body	A tick box to indicate whether the organisation is a public body.		✓
Non-profit	A tick box to indicate whether the organisation is non-profit.		✓
Number of employees below 250?	A dropdown menu to indicate whether the size of the organisation. You can choose either ‘yes’ or ‘no’.		✓
Legal Address	The street name and number of the organisation.	✓	
Country	The country where the organisation was established.	✓	

Field	Description	Update from Participant Portal	Update Manually
Region	The region/county where the organisation was established.	✓	
P.O. Box	The P.O. Box number of the organisation.	✓	
Post Code	The postal/zip code of the organisation's legal address.	✓	
CEDEX	This is only applicable for France.	✓	
City	The city where the organisation was established.	✓	
Email	The email address of the organisation.	✓	
Website	The website of the organisation.	✓	
Telephone 1	The main telephone number of the organisation.	✓	
Telephone 2	A secondary telephone number of the organisation.	✓	
Fax	The fax number of the organisation.	✓	
Organisation Comments	Any additional notes or remarks about the organisation		✓

To update information manually, input the data into the relevant field. To update information from the Participant Portal click the ‘Check PIC’ button to update the details for the organisation. In both instances, check the updated information and click ‘Save’ to save your changes.

You can only amend the information about your partners. If you need to amend information about your own organisation you should refer to the contract amendment procedure as issued to you by the UK NA.

Contacts

From the contacts section of MT+ you can see a list of contacts that are involved with the project. This section of the guide covers how to access the list of contacts and how to amend this information.

List Contacts

Available Features

	Select all contacts in list
	Add new contact
	Delete selected contact
	Export list of contacts as Excel/CSV file.
	Print list of contacts
	Add/remove columns from list
	Search for information in the list

Reset filters and/or clear search results

Edit contact information

To see the contacts involved with the project you will need to select the ‘Contacts’ tab from the toolbar at the top of the screen and choose ‘List Contacts’ from the dropdown menu. This will display a list of any contacts that have been added from across the organisations involved in the project. Here you can see basic information including the name, telephone number, email address and the name of organisation for each person. You can also see whether they are the legal representative or a preferred contact for the project and whether they have access to MT+. When you access a project for the first time in MT+ the details for the contact person and the legal representative for the beneficiary organisation included in the original application form and confirmed during the contracting stage will have been automatically uploaded.

Please note: when the project is imported to MT+ both the authorised contact person and the legal representative will be automatically given access to the project on MT+. It is advised that access to the project is limited to just the contact person and legal representative. However, you may add additional contacts from the beneficiary organisation and allow them access to the project. If additional access to the MT+ is granted, it will still be the responsibility of the authorised contact person and the legal representative to ensure the data in the MT+ is up to date and accurate. You can use the Project Details section of MT+ to see when the MT+ was last updated and by which contact.

To view the full details for a contact, click the icon next to the person’s name. To amend any of these details click the icon above the contact details. You will be able to navigate through the details stored for this person, making any changes as necessary. You can also choose to send an invitation by email for this person to access MT+. Please ensure that you click ‘Save’ following your amendments.

To delete a contact you will need to return to the list of contacts. The first column in the list has a check box for each contact. You will need to click this box for the contact you want to delete and click the ✖ icon. **Please note:** there is no confirmation box and this will permanently delete the contact from MT+.

Add New Contact

To add a new contact you should choose ‘Create a new Contact’ from the dropdown menu of the ‘Contacts’ tab from the toolbar at the top of the screen. You will need to fill in all of the required fields marked with a red asterisk. To give the new contact access to MT+ select the ‘Access to Project’ check box after inputting all the necessary details to send an email to the person with an invitation to access the project. When you have finished click ‘Save’ to add the new contact.

Mobilities

From the Mobilities section of MT+ you can see a list of mobilities for the project. This section of the guide covers how to access the list of mobilities and how to create a new mobility. **Please note:** before creating any mobilities please ensure that all of the sending and receiving organisations are included in the list of organisations. If one of your partners seems to be missing, please contact your project officer.

When you first access a project this section of MT+ will have no mobilities listed. This is the main section you will use to input data about your project. The information you input here will be used to pre-populate sections of the final report for you project so it is very important that it is accurate.

List Mobilities

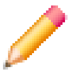
Available Features

Select all mobilities in list

Add new mobility

Delete selected mobility

Export list of mobilities as PDF file

	Export list of mobilities as Excel/CSV file
	Print list of mobilities
	Add/remove columns from list
Search:	Search for information in the list
	Reset filters and/or clear search results
Export Participant Report	Export a ZIP file containing CSV files with participant reports grouped by activity type
	Edit contact information

You will be able to see any mobilities you have added when you click ‘List Mobilities’ from the Mobilities section of the toolbar. This page will list all participants with mobility, with some basic information including the name and email address of the participant, information about the mobility such as the activity type and placement dates, and the status of the Participant Report. To show more detailed information relating to an individual participant and their mobility, click the  icon next to the participant’s name on the left hand side of the screen. This will allow you to view information relating to the placement location, the participant details, and the budget for this mobility. If you need to change any of this information, click the  icon above the mobility information to go to the Mobility Form. You can now amend any information as necessary and click ‘Save’ when finished.

If you need to delete a mobility you should return to the list of mobilities. Click the checkbox next to the name of any participants you want to delete and then click the  icon. **Please note**: A warning message “Are you sure you want to delete this mobility?” will be displayed. Click ‘OK’. A confirmation message “the record has been deleted successfully” will be displayed and the selected mobility won’t appear in the list of mobilities.

You will also be able to use this section of the MT+ to monitor whether participants have completed their report after undertaking mobility. For KA1, all participants must complete a participant report. An email is automatically sent by the MT+ after the end date of a participants’ mobility. This email contains a link to the report which is completed as an online questionnaire through EUSurvey. If the MT+ has sent the email to request the report but the participant has not received it, you should first confirm with the participant that you have the correct email address. If necessary, you can amend the email address by editing the mobility. You can then re-send the report request by clicking the icon next to the participant’s name and clicking the Re-Send underneath the Participants Report table. You can also view the submitted reports from your participants on this screen by clicking the link to the PDF version of the report in the Participants Report table. In addition to viewing an individual participant’s report you can also export a consolidated Participant Report that includes the data from all the submitted individual participant reports. This report is in CSV format and you may need to amend the settings on your computer before downloading it. For information on how to do this, please refer to the Import/Export section.

Create New Mobility

To add a new mobility click the icon. This will take you to the Mobility Form where you can input all the necessary information relating to the activity, participant, placement, budget and recognition of learning outcomes. You will need to complete all sections marked with a red asterisk as a minimum and calculate the budget before you can save the mobility.

You will need to select the activity type from the dropdown menu and specify whether it is a long-term activity if necessary.

When inputting the participant’s details, please ensure that an individual email for each participant is provided as this will be used to send the participant notifications such as the request to complete the Participant Report. **Please note:** participants cannot undertake mobility in the country of their nationality e.g. a Spanish national cannot undertake mobility in Spain.

You will now need to input all the information relating to the mobility. This includes information about the partner organisations and the information needed to calculate the budget.

You will need to select the sending and receiving organisations from the relevant dropdown lists. The country and city information for each organisation will be pre-filled based upon the information from the 'Organisations' section of MT+. However, this information can be changed and there is a comments box to explain any differences in location. Ensure that the 'Sending Country' is **always** selected as 'UK – United Kingdom'. Participants sent from any country outside the UK will be deemed ineligible.

Please note: If a partner you wish to select is not listed, it is likely that they are not part of your contract with the UK NA. Please review the 'Partners' section of this guidance note and contact your project officer at the UK NA before registering a new partner.

You will need to choose the correct distance band based upon the Distance Calculator which should match the information provided in the application form. The dropdown menu will not populate with the distance bands until you have completed the previous fields in the form. You do not need to input the travel grant amount as this will be calculated later.

For the start and end dates you should input the dates of the mobility itself, not including any days related to travel. For example, if the mobility starts on Monday 12 October 2015 and ends on Friday 30 October 2015 with participants travelling out on Sunday 11 October 2015 and returning on Saturday 31 October 2015, the start date would be 12/10/15 and the end date would be 30/10/15 with two days input under travel days. The fields relating to the duration of the mobility will be calculated later so you do not need to manually complete these.

You should also input any special needs support funding that was included in your grant amount and complete the comments box, if necessary. You can also indicate if the mobility has been affected by force majeure by clicking the relevant checkbox and inputting an explanation in the 'Mobility Comments' box at the end of the form. **Please note:** in the case of force majeure you should first contact your Project Officer at the UK NA.

Once you have input all the details relating to the mobility, you should click the 'Calculate' button. This will calculate the unit costs for travel and individual support based upon the information you have entered. If you need to change any details you can click the checkbox for 'Edit'. This will allow you to amend the information and recalculate the budget.

If applicable, enter any relevant certification for the participants in this mobility experience. Select the relevant certifying partner from the drop down menu, the relevant type of certification, and the number of credits awarded.

To choose languages used in this mobility, select the relevant language from the dropdown menu for 'Instruction/Work Language' and 'Other Used Language'. If your project was awarded funding for linguistic preparation for this mobility you can tick 'Edit' next to the 'Calculate' button and tick the 'Linguistic Preparation' box. You should then click the 'Calculate' button again. The total grant amount on the mobility form will not include the amount for linguistic preparation but this will be included in the Budget section of the MT+.

When you have finished inputting all the information for the mobility, click 'Save' and a confirmation message stating that the new mobility experience has been added will be displayed.

Import/Export

The Import/export section is accessed from the Mobilities dropdown menu. The feature allows you to import data using a spreadsheet rather than using the in-built form to create mobilities. You can also export a spreadsheet with the data of all the mobilities that have been added to the project.

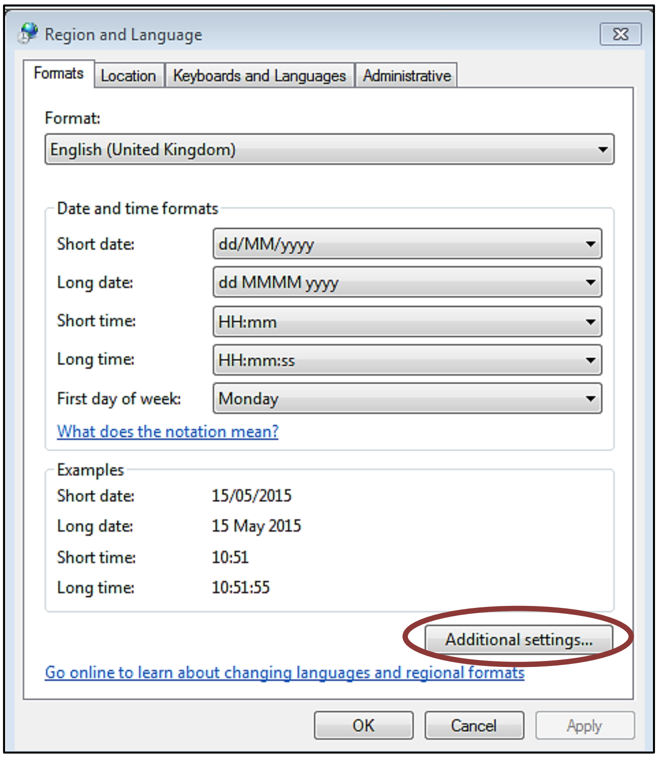
The main purpose of the import feature is to enable beneficiaries of large-scale projects with a large number of participants to enter data into the MT+ in a more efficient way since multiple participants can be added at the same time. **This should be only used if you feel comfortable with using CSV format files in Excel, have a very large-scale project and need to add more than ten mobilities to a flow.** Otherwise, you should continue to use the in-built Mobility Form to add new mobilities in Mobility Tool+ itself.

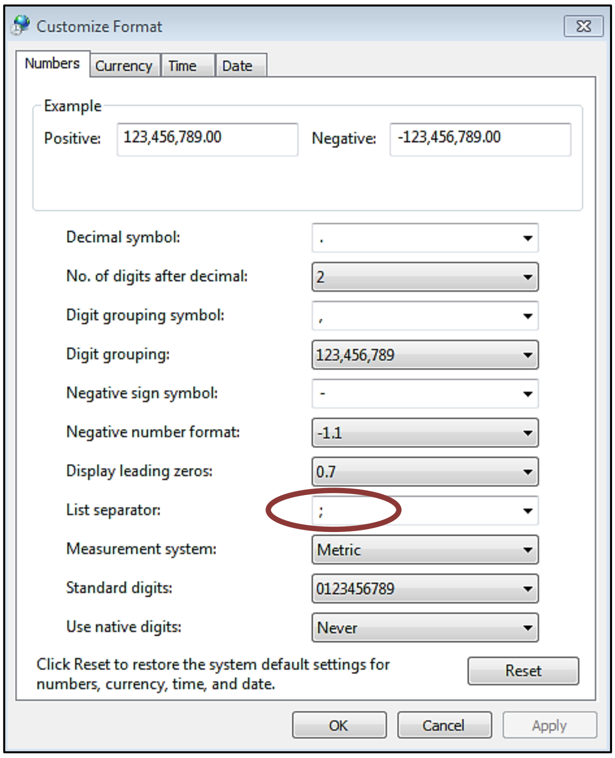
Before using the import function, the UK NA recommends that you first create a mobility using the Mobility Form within MT+. You can then export this data and use this as a foundation for adding new mobilities. When exported, data from MT+ is saved in CSV (Comma Separated Values) file format. **Please note:** Semicolon (;) is used as a default field separator and you may need to change the settings on your computer before exporting the data.

To check whether the field separator is already set to semicolon you will need to check the settings on your computer and change them if necessary.

How to change settings on Windows

From the start menu, go to Control Panel → Region and Language → Formats → Additional Settings and change List Separator to semicolon (;)





Please note: The NA cannot provide technical assistance to help you change the settings on your computer. If you experience difficulties or are using a different operating system you will need to speak to your organisation's IT department for further guidance.

The process of exporting data from the MT+ can be take some time and may result in a large file.

To successfully import mobilities you will need to use the Mobility Tool+ Data Dictionary. This can be downloaded from the Import/Export section of the MT+. The Data Dictionary includes guidance about how the mobility information should be encoded for the CSV file to allow the MT+ to understand the data. After you have added all the information for the mobilities you want to import you will need to save this as a CSV file locally on your computer. To import the information, you need to go to the Import/Export section of the MT+, click 'Browse' and select the file you have just saved.

The MT+ will now attempt to import the mobility data in the file. During this process the MT+ checks the information in the file to ensure that it's encoded correctly and meets the general requirements for the relevant Key Action, Field, and Activity Type. Once the MT+ has finished checking the data, the file will either be successfully imported or the MT+ will generate an Error Log to show what information needs to be amended.

Budget

The Budget section of the MT+ provides a summary of the financial details of the project against each of the budget headings. This section displays the current budget based on the information in the MT+ as well as the budget approved by the NA that is detailed in your Grant Agreement. The UK NA recommends that you regularly check the Budget section of the MT+ to help you financially manage your project and any budget transfers that you have informed the NA about. For this purpose the MT+ also includes a column which displays the percentage of you current budget against the approved budget. If you go over your approved budget for any heading, the amount will be shown in red.

Most of the cells in the Budget section are grey and cannot be changed manually. In particular, the cells in the 'Approved Budget' and '% Current / Approved budget' columns are greyed out and cannot be edited in the MT+. **If there is an error in the approved budget, please contact your project officer at the NA immediately.**

The information provided in the Current Budget column is generated from the data you have input in the Mobilities section of the MT+ so most of the cells are also greyed out. If you notice an error you should return to the Mobilities section and check that the information here is accurate. Any cells that are white will need to be filled in directly in the Budget section. For example, the budget heading for Organisational Support needs to be manually completed. This is to allow you to make budget transfers within the rules set out in your Grant Agreement. For Organisational Support, the MT+ shows the calculated total based on the number of participants (excluding accompanying persons) that have been input in the Mobilities section. This amount is shown above the cell for Organisational Support in the Current Budget column of the Budget section of the MT+. You will then need to manually input the amount up to the maximum amount shown that you intend to claim under this budget heading and then click the Save button.

It is important to ensure that the information in the Budget section of the MT+ is accurate and kept up-to-date throughout the lifetime of your project.

Reports

From the Reports section of the MT+ you can generate the Beneficiary Report for your project. This is the Final Report which will need to be submitted after the end date of your project. You can check the deadline for the submission of the report in your Grant Agreement.

Before generating the Beneficiary Report, make sure you have input all the participant information into the Mobilities section and checked that the organisational and financial information is correct in the Budget section. When you are ready to generate the report, go to the Reports section and click the Generate Beneficiary Report button. First, you will receive a message saying the report has been generated. This is a draft version of the report and an Edit Draft button will become available to allow you to complete the report.

The report is completed within the MT+ and there is no file to download. When you open the report there is a navigation pane on the left which shows the status of the report, when it was last saved, and the headings for each section. You can click each heading to navigate to that section of the report.

When you first open the report, some of the sections will have been automatically completed with information about your project from the MT+. The Beneficiary Report consists of three areas: general information about your project, qualitative and evaluative information about implementing the project, and financial information. The general information is covered by the Context and Project Summary sections of the report and this has been automatically completed by the MT+. The qualitative and evaluative information forms the majority of the report and is split into several sections. These sections will be tailored for the Key Action and Field of your project. More information about completing these sections of the report will be available in a separate Beneficiary Report Guidance document which will be available on the Erasmus+ website. The finance information is covered by the Budget section of the report and this has also been automatically completed by the MT+ using the information from the Mobilities and Budget sections. There is also an Annexes section where you can upload supporting documents. You should refer to the Beneficiary Report Guidance to check which documents you need to upload. Please be aware that you might not be able to upload files that are considerably large in size. If you have any difficulties uploading documents you should contact your project officer at the UK NA.

When the report is complete and ready for submission, the submit button will become available.

Key Action 2

Introduction

The reporting requirements for Key Action 2 (KA2) projects are significant as there is potential for a large number of activities within these projects. As the project progresses all KA2 projects will need to complete information relating to Project Management and Implementation (PMI), Transnational Project Meetings (TPM), the project's budget summary, and beneficiary reports. If the project has been granted special needs funding, the coordinator will need to complete the Special Needs (SN) section.

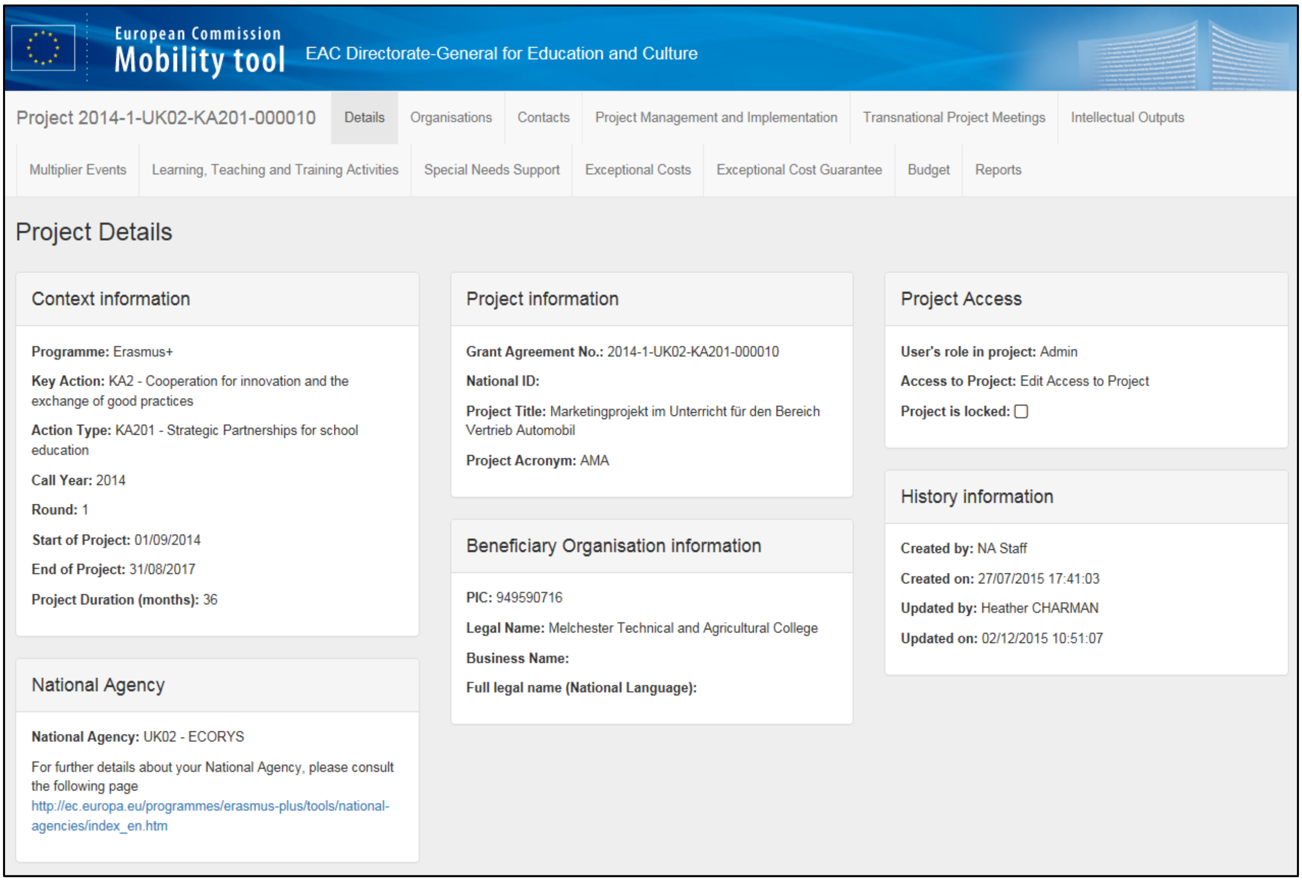
If the project has funding for Intellectual Outputs, Multiplier Events or Learning, Teaching and Training activities, the co-ordinator will be required to complete sections on Intellectual Outputs, Multiplier Events, Learning, Teaching and Training Activities (LTT Activities), and Exceptional costs if the projects you are managing have budgets for these activities.

Project Details

When you log in to Mobility Tool+, you should click on 'Projects'. You will see a list of projects that you have been granted access to. If you were involved in projects under the Lifelong Learning Programme (predecessor programme to Erasmus+), you will see these as well as any Erasmus+ projects. If you have more than one Erasmus+ project, you can identify your Key Action 2 projects by the grant agreement number. All Key Action 2 projects have 'KA2' in the grant agreement number and the year of the project is shown at the beinning of the grant agreement number, for example: 2014-1-UK01-KA2XX-XXXXXX.

You can click on a project's 'Grant Agreement No.' to see the project details. If you have access to a number of projects, you can quickly find an individual project using the in-built search function in your browser by pressing 'Ctrl' and 'F' on your keyboard and typing the grant agreement number. This project will then be highlighted.

When you click on a grant agreement number associated to a project, you will be taken to the Project Details. This will display the key information about your project, as shown in the screenshot below:



Please note that the information in the Project Details cannot be amended through the Mobility Tool+. If your organisation needs to update project details as shown on the Project Dashboard, please contact your National Agency directly.

In addition to project information, you will be able to see a toolbar with options to navigate through your project information. This toolbar is for easy access to different sections and will stay in place throughout all sections.

There will be 5 boxes displayed under the Project Details page with information as follows:

Context – This box holds a basic overview of your project details, such as the key action you have been awarded funding for, the call year for your project, the round under which you applied, the start and end date of the project and the project duration.

Project Information – This box displays specific information regarding your project, including the grant agreement number for the project, the project title and the project acronym.

Project Access – This box displays the role of the person accessing the Mobility Tool+, what type of access this person was permitted and whether or not the project is locked.

Beneficiary Organisation Information – This box displays information based on the lead organisations details.

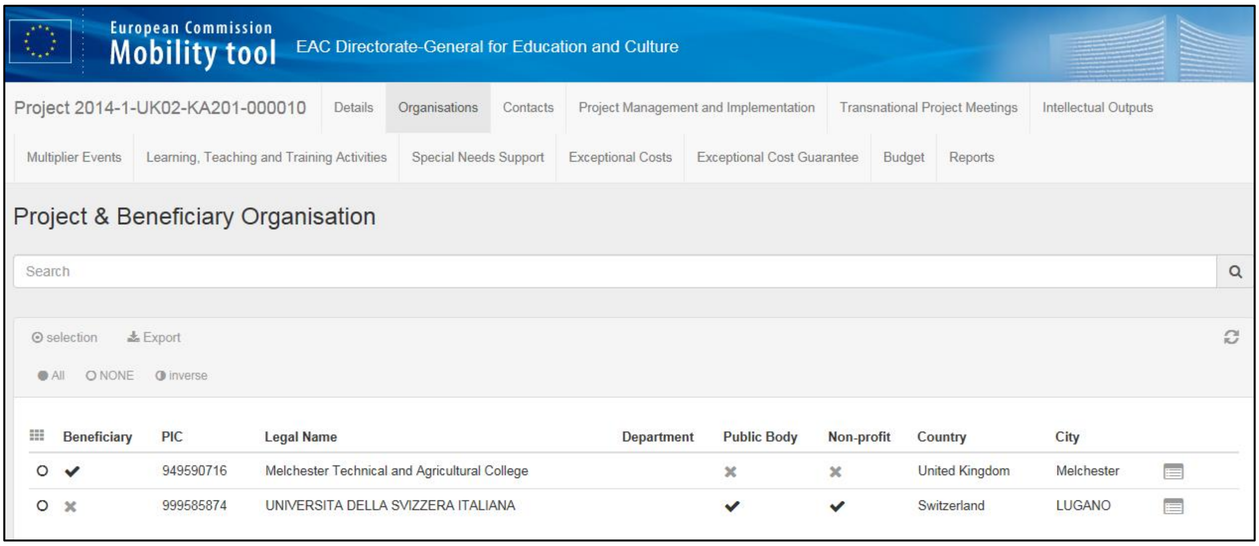
History Information – This box displays information regarding when your project was created in Mobility Tool+ and when it was last updated.

Organisations: Project & Beneficiary Organisation

Available features:

To view the organisation

After logging in to the Mobility Tool+ and accessing the relevant project you will need to select the 'Organisations' tab from the toolbar. You will then be taken to you will be taken the 'Project and Beneficiary' screen. This will display a list of the organisations involved with the project and some basic information, such as the name, PIC number and country where it is established. Your organisation will be marked as the beneficiary. A screen shot of this is shown below:



To view the full details for an organisation, click the icon on the right side of the list next to the organisation you want to review. This will display information about the organisation and its contact details. When you first access a project in Mobility Tool+, all the organisations that were included in the original application form and confirmed during the contracting stage will have been automatically uploaded. Please note that the beneficiaries are not able to change or remove details for their partners or their own organisation. If you need to make any changes on the details of your or your partners' organisations, please contact the National Agency.

Contacts: List Contacts

Available Features

To view the contact

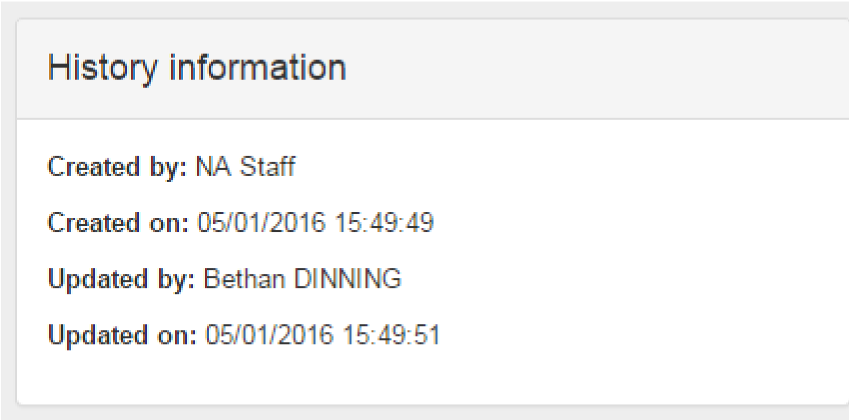
To edit the contact

To delete the contact

To see the contacts involved with the project, you will need to select the 'Contacts' tab from the toolbar at the top of the screen, which will take you to the 'List Contacts' page. This will display a list of any contacts that have been added from across the organisations involved in the project. Here you can see information including the name, telephone number, email address and the name of organisation for each person. Please note that when the project is imported to Mobility Tool+ both the authorised contact person and the legal representative will automatically be given access to the project on Mobility Tool+. The existing legal representative and contact person can add additional users to the project from within the Mobility Tool+. Once added, these contacts will be able to assist in administering the project from within Mobility Tool+.

It is advised that you grant access only to individuals who will have a direct responsibility for assisting with reporting. Please also note that there are 3 options available when giving access to a project which includes Edit Access, View Access and No Access. It is the co-ordinators responsibility to delegate the appropriate level of access to each member of staff within their organisation.

If additional access to the Mobility Tool+ is granted, it will still be the responsibility of the authorised contact person and the legal representative to ensure the data in the Mobility Tool+ is up to date and accurate. If you would like to see who last accessed the project with the Mobility Tool+, please refer to the ‘History information’ box, which can be found under the ‘Project Details’ tab Mobility Tool+ as shown below:



To view the full details for a contact, click the view icon on the right side of the organisation’s tab.

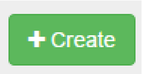
Edit a Contact

To amend any of these details click the edit icon. You will be able to navigate through the details stored for this person, making any changes as necessary. Please ensure that you click ‘Save’ following your amendments. You can also amend an individual’s role and access rights by selecting the relevant box as shown below:

Delete a Contact

To delete a contact you will need to return to the list of contacts. You will need to click delete icon for the contact you want to delete. **Please note:** there is a confirmation box which will ask you if you are sure you want to delete the selected item.

Add New Contact

To add a new contact you should click on the 

button. You will need to fill in all of the required fields to be able to save new contact. Please don't forget to select the relevant access rights for the individual by selecting either 'Edit Access to Project', 'View Access to Project' or 'No Access to Project'. When you have finished click 'Save' to add the new contact and an email will be sent to the individual's email address prompting them to complete their registration and access the Mobility Tool+.

Project Management and Implementation (PMI)

Available Features

To edit the grant

The initial screen shows all participating organisations in the project including the lead organisation and project partners. Their role in the project is identified as either a 'Beneficiary' or 'Partner'. If not pre-populated, please type in the 'Project Management and Implementation' budget for each organisation involved in the project. This should be input in the 'Total Amount (Adjusted)' box. For monthly unit cost contribution rates for Project Management and Implementation, please see your grant agreement. In any case, your combined Project Management and Implementation request must not exceed the numerical value displayed at the bottom right hand corner of the page entitled 'Maximum Project PMI Approved Amount'. This is the total amount of Project Management and Implementation budget that your project was awarded according to the project duration at the contracting stage. .

If there is any discrepancy between the amounts that you enter into the tool and the maximum Project Management and Implementation amount, you should provide an explanation in the narrative box provided at the bottom of the page.

Intellectual Outputs | Multiplier Events | Learning, Teaching and Training Activities | Special Needs Support | Exceptional Costs | Exceptional Cost Guarantee | Budget | Reports | NA Validation

Project Management and Implementation

Search

selection Export

	Participating Organisation	Role	Total Amount (Adjusted)
O	Melchester Technical and Agricultural College	Beneficiary	20,600.00 €
O	UNIVERSITA DELLA SVIZZERA ITALIANA	Partner	1,000.00 €
Total:			***21,600.00 €***

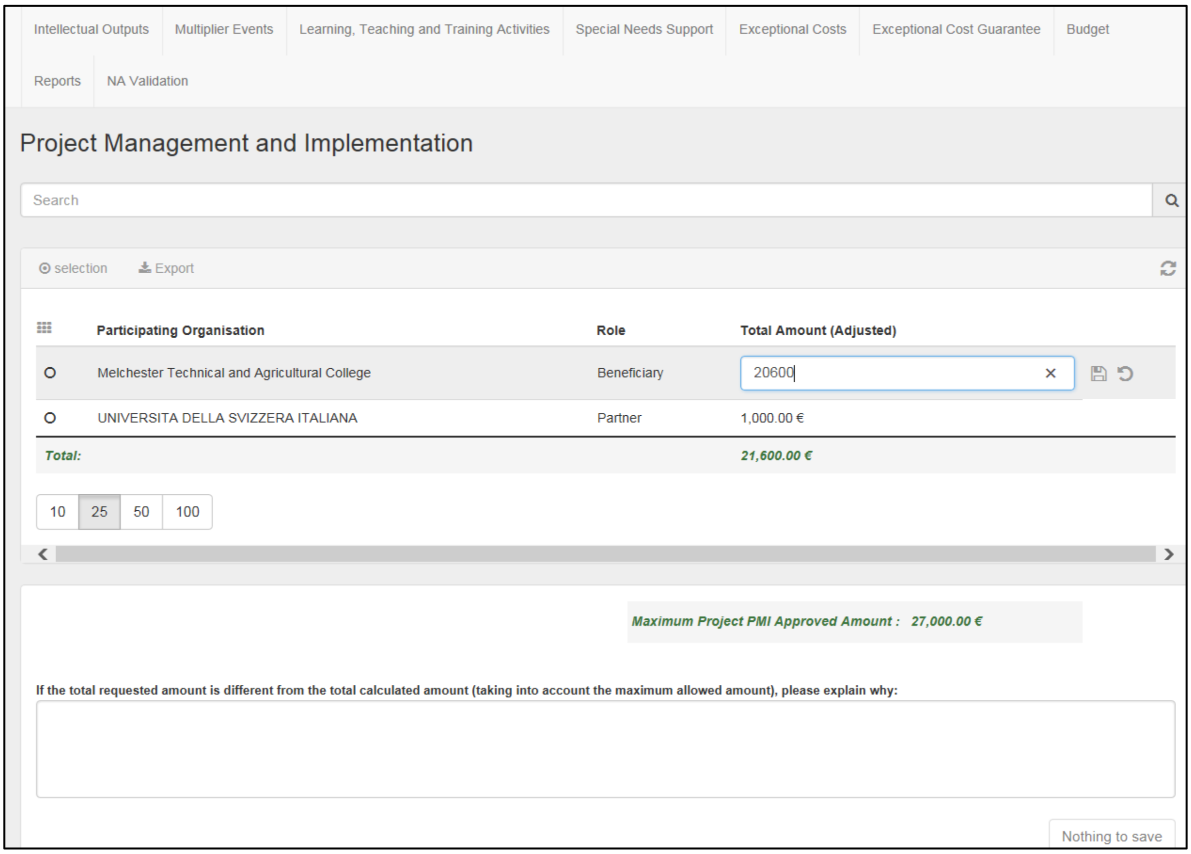
10 25 50 100

Maximum Project PMI Approved Amount : 27,000.00 €

If the total requested amount is different from the total calculated amount (taking into account the maximum allowed amount), please explain why:

Nothing to save

To adjust the grant amount, click and the relevant row will then be accessible to edit (please see screenshot below):



Transnational Project Meetings (TPM)

Available Features

To view the meeting

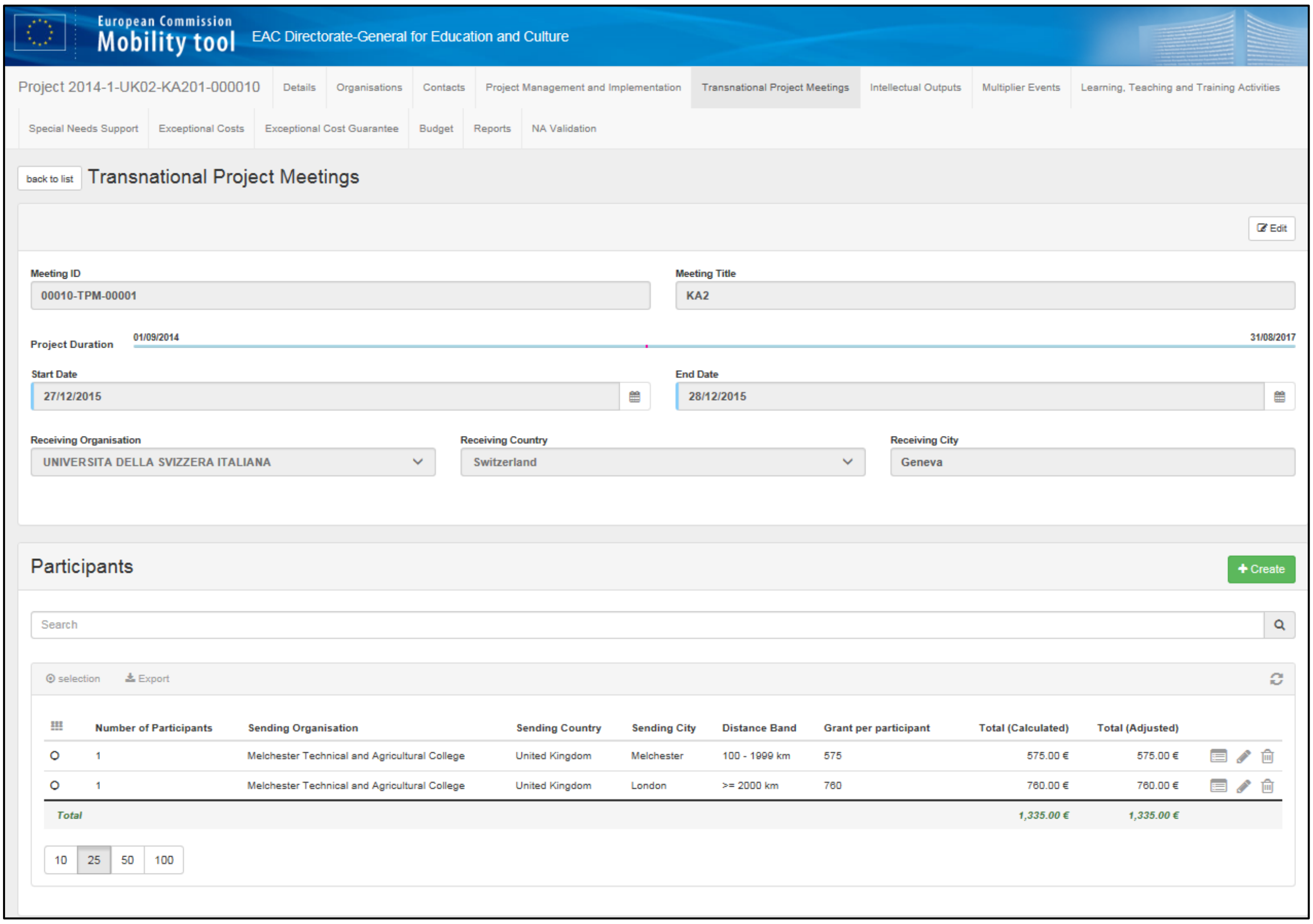
To edit the meeting

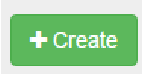
To delete the meeting

To view, edit and add Transnational Project Meetings, please select the ‘Transnational Project Meeting’ tab in the top toolbar.

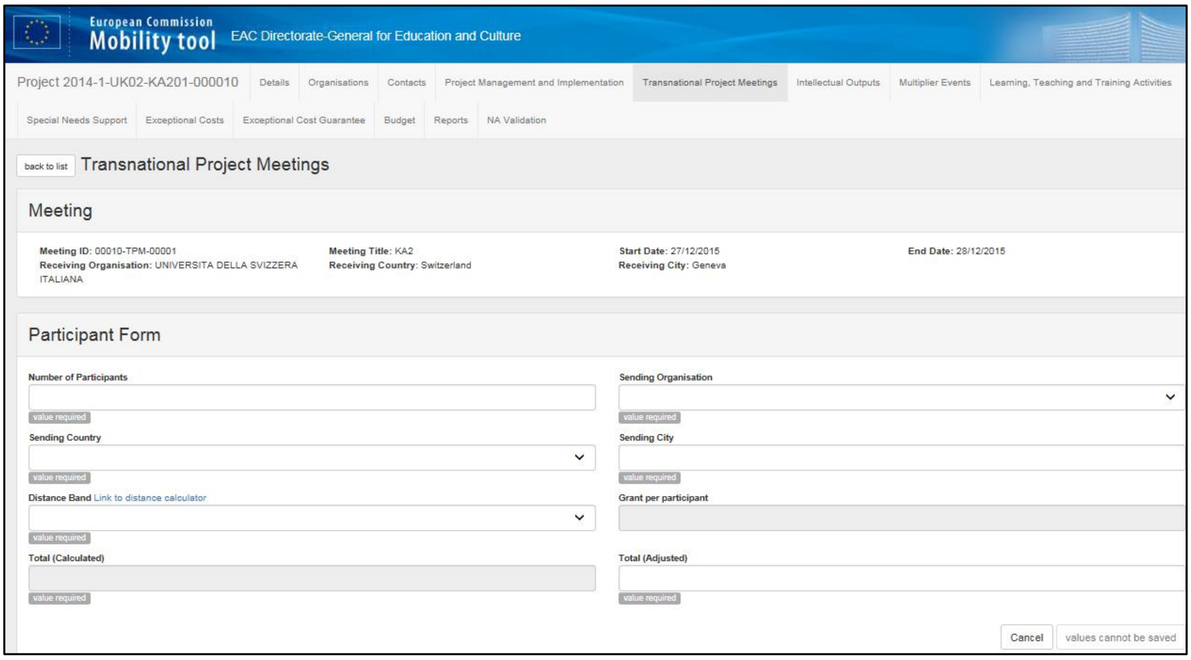
This initial screen has self explanatory sub headings which show the details of the Transnational Project Meetings which have taken place as input by the coordinator.

To edit, click on which will open up a new screen as below:



The screenshot below displays an example of the window that will appear if you click the 

button to create a new meeting. Here, you will be able to insert data for the meeting which took place. This will include the duration of the meeting, the title of the meeting and the specific destination details as per sub headings.



Intellectual Outputs (IO)

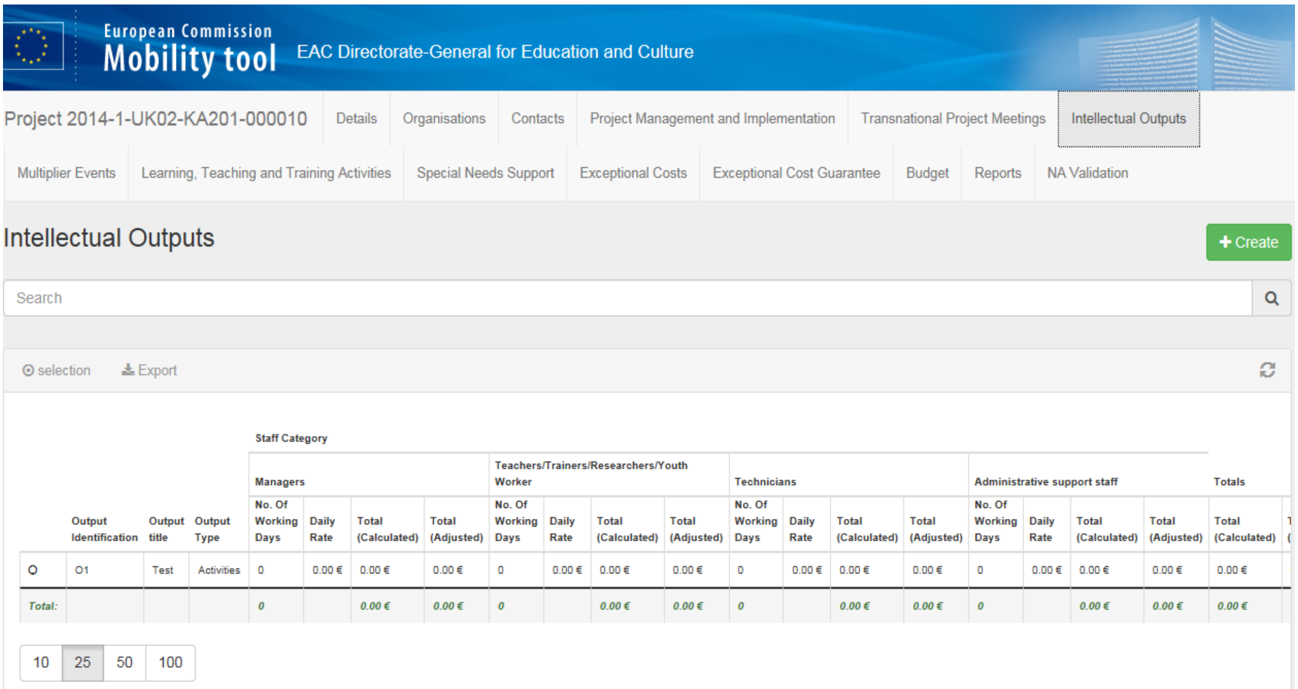
Available Features

To view the IO

To edit the IO

To delete the IO

To view, edit and add Intellectual Outputs, please select the ‘Intellectual Output’ tab in the top toolbar. The screen shot below shows the Intellectual Outputs Tab of the Mobility Tool+:



Viewing and Adding a New Intellectual Output

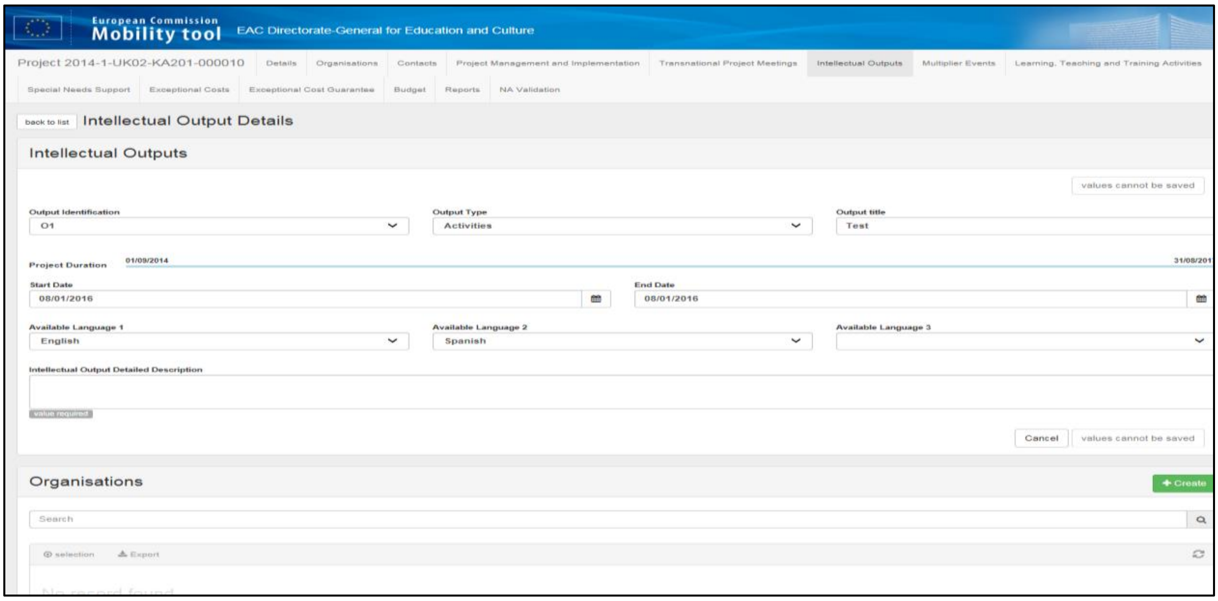
To view the Intellectual Outputs expenditure, you will need to select the Intellectual Outputs tab from the toolbar on the top. This tab displays each individual intellectual output, the type of output and staff categories. The main list displays different outputs being carried out, staff category applied to the individual working on the output, amount of the days which were used to work on the particular output and rates.

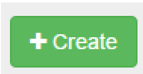
To enter expenditure for each individual intellectual output, you have to create a new record. To do this, click on the + Create button. A new window will open, allowing you to insert the data required. Please make sure that all required information is entered correctly before you save the record. You can also view the record by using icon and edit the record by using . The record can be deleted by clicking the icon. Please ensure that you are confident you want to delete the particular record as, once you press the confirmation, the data will be deleted permanently. A pop up message will appear once you click on the icon asking you if you want to delete the selected item. Please see the screenshots below for the illustration.

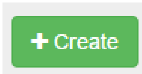
ERASMUS+

CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

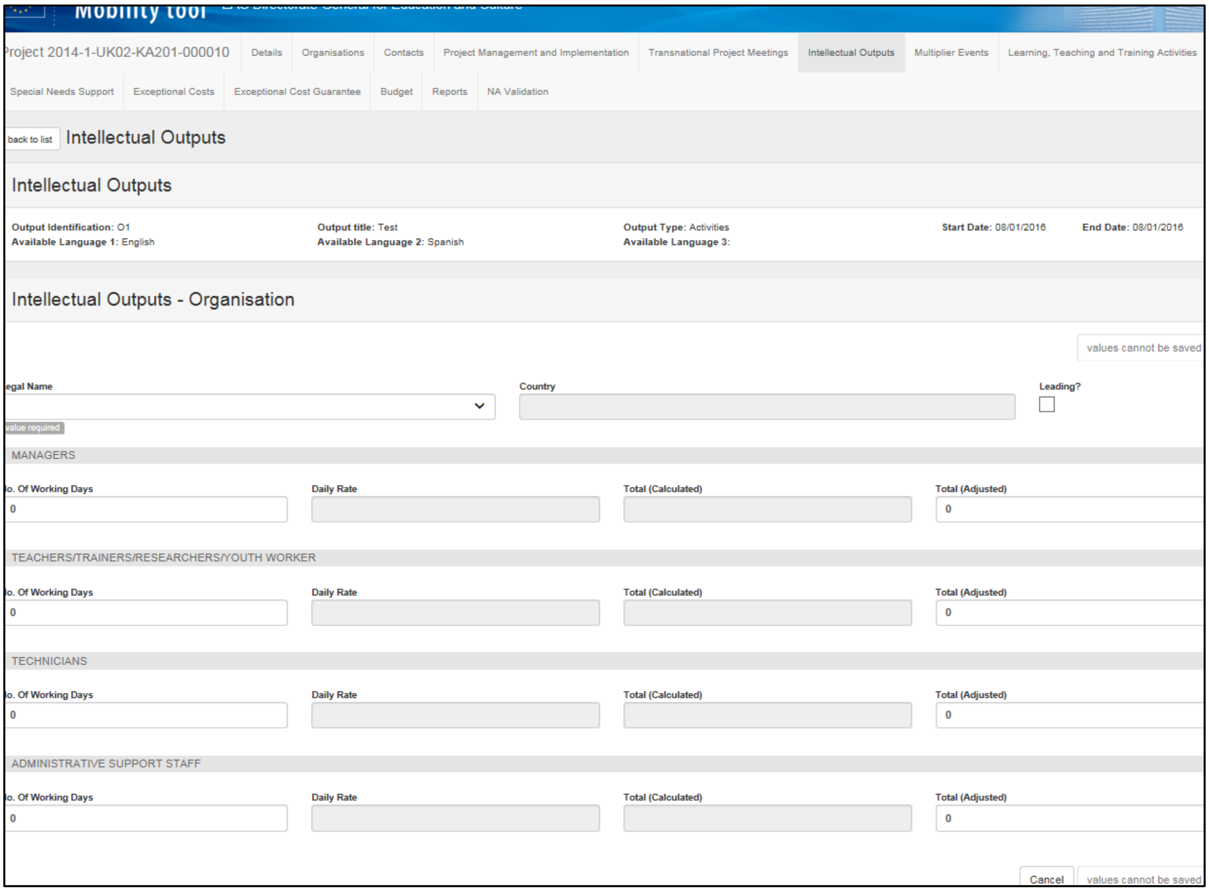
Adding Intellectual Output data



On this page the user can fill in the details as per corresponding subheadings. Further down the page, the green 

button can be found next to organisations. Once this 

button is selected, it takes the user to the next page where they can input the specific details of the time spent on this particular Intellectual Output. The user must make sure the information input here is accurate as this will feed into the main budget. The organisation and specific details page will look like this:



On this screen, you are able to input information into the relevant categories. You are able to identify the category of the employee working on this Intellectual Output. The unit cost contribution rates will automatically populate.. You are also able to adjust the figure that your project wishes to claim for in the total (adjusted) column; for example when your organisation makes a contribution in kind Once you have completed these steps, it is advised to save the new details, This ensures that the data is registered within the Mobility Tool+ and will appear in the main Intellectual Outputs screen. .

Multiplier Events (ME)

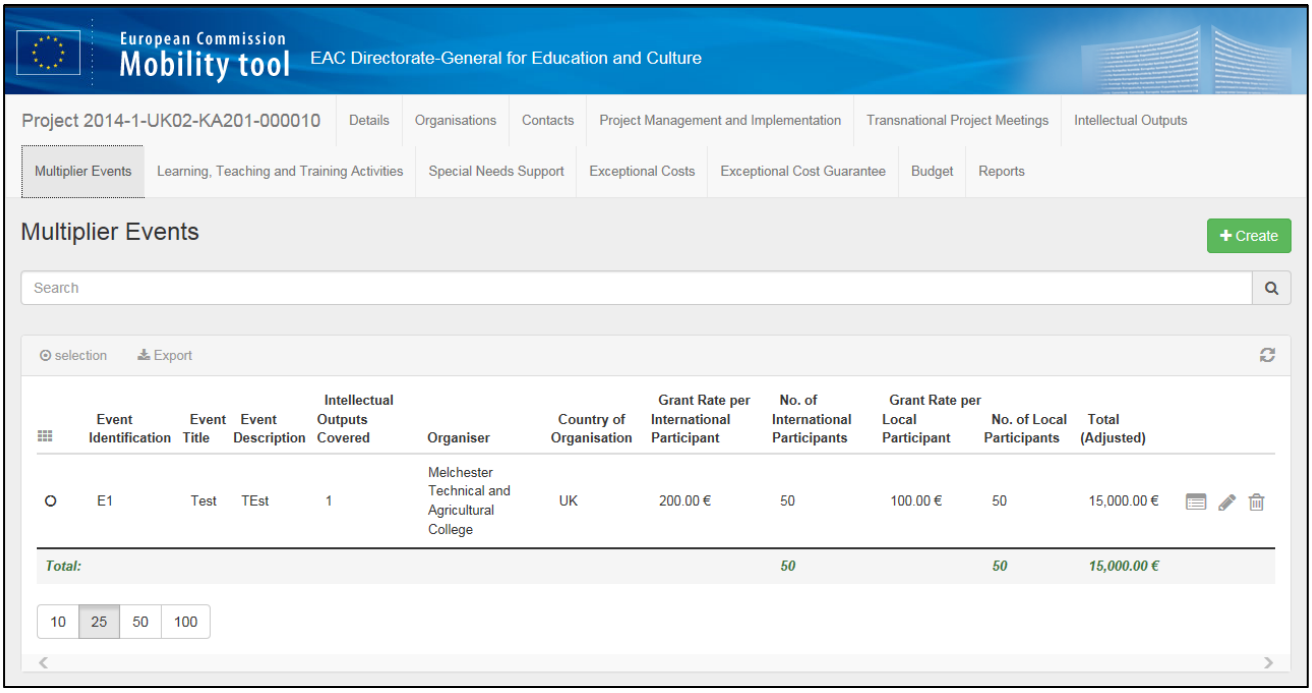
Available Features

To view the event

To edit the event

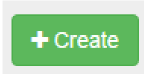
To delete the event

To view, edit and add Multiplier Events, please select the ‘Multiplier Events’ tab in the top toolbar.You will see the following screen:

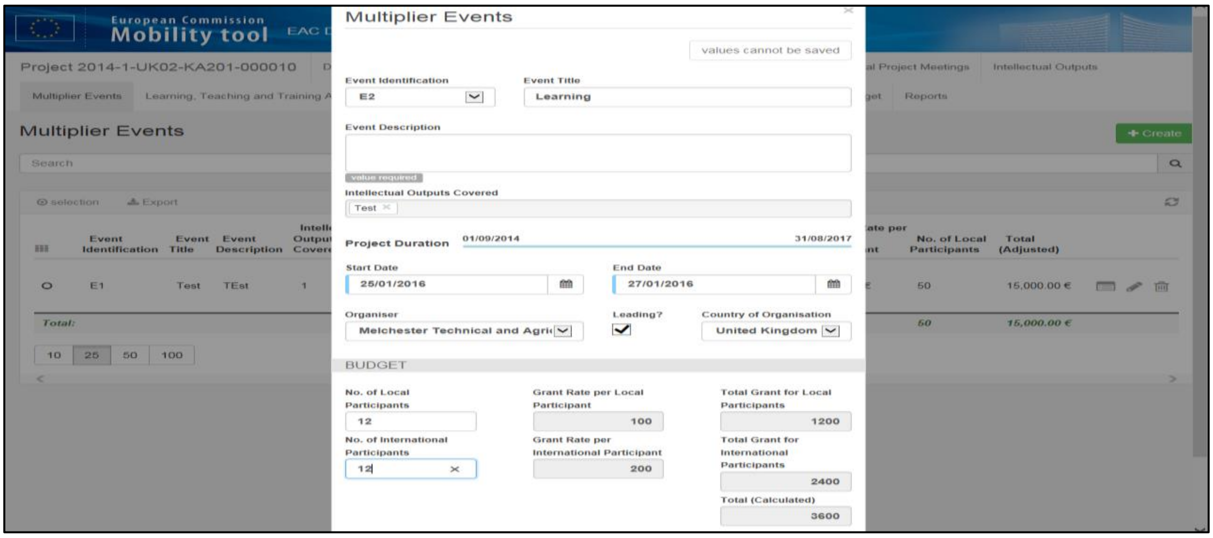


Create a Multiplier Event

To view an individual multiplier event please select the  icon at the end of the individual row. To delete a multiplier event please select the  icon, and then select ‘delete’ in response to the prompt box that appears on the screen.

To create a new Multiplier Event select the 

icon; a pop up screen will then appear as shown below:



For each individual Multiplier Event, the following information must be entered:

- **Event identification –** please select the correct event code from the drop down list. This must be selected for each Multiplier Event to link it to a specific Intellectual output disseminated during this event. If you are unsure, please refer to the codes in your organisation's application form**.**
- **Event title –** please enter the event title; this should ideally match, or be similar to, the one listed in the application form.

  Event description – please write a description of the event. Please note that this is limited to 2000 characters. You should comment on the content and agenda for the day and the participants who attended. You should demonstrate clearly how the multiplier event disseminated and increased the impact of one or more of the Intellectual Outputs your project produced. Please include justification as to who outside of the project benefitted from the event.
- **Intellectual Outputs covered –** Multiplier events must directly correspond to an Intellectual Output produced. Please select the Intellectual Output(s) linked to this Multiplier Event from the dropdown list.
- **Start/End Date –** please enter the start and end date of the event in the fields provided**.**

- **Organiser –** please select the organising organisation from the dropdown list. Please also tick the box adjacent to identify whether the organisation is leading the event. Once an organisation has been selected from the dropdown list the 'country of the organisation field' will be automatically populated.

Within the 'Budget' section of the form, please enter the number of local and international participants into the relevant fields. Funding under this budget category Multiplier Events cannot be used to cover the costs for travel and subsistence of representatives of participating organisations involved in the Erasmus+ project. You should not include individuals from the Erasmus+ project as a participant number total for the event. Please note a local participant is an individual from an external organisation to the project that is located in the country where the Multiplier Event takes place. An international participant is an individual from an external organisation of the project that is based in a country other than that where the Multiplier Event takes place.

As soon as the number of participants is input, the fields in grey will automatically populate .

Once the all of the required fields have been completed in the form it can be saved by clicking the green 'Save' button at the bottom right hand corner of the form. Once the form is saved you will be returned to the main Multiplier events screen.

Learning, Teaching and Training Activities (LTT)

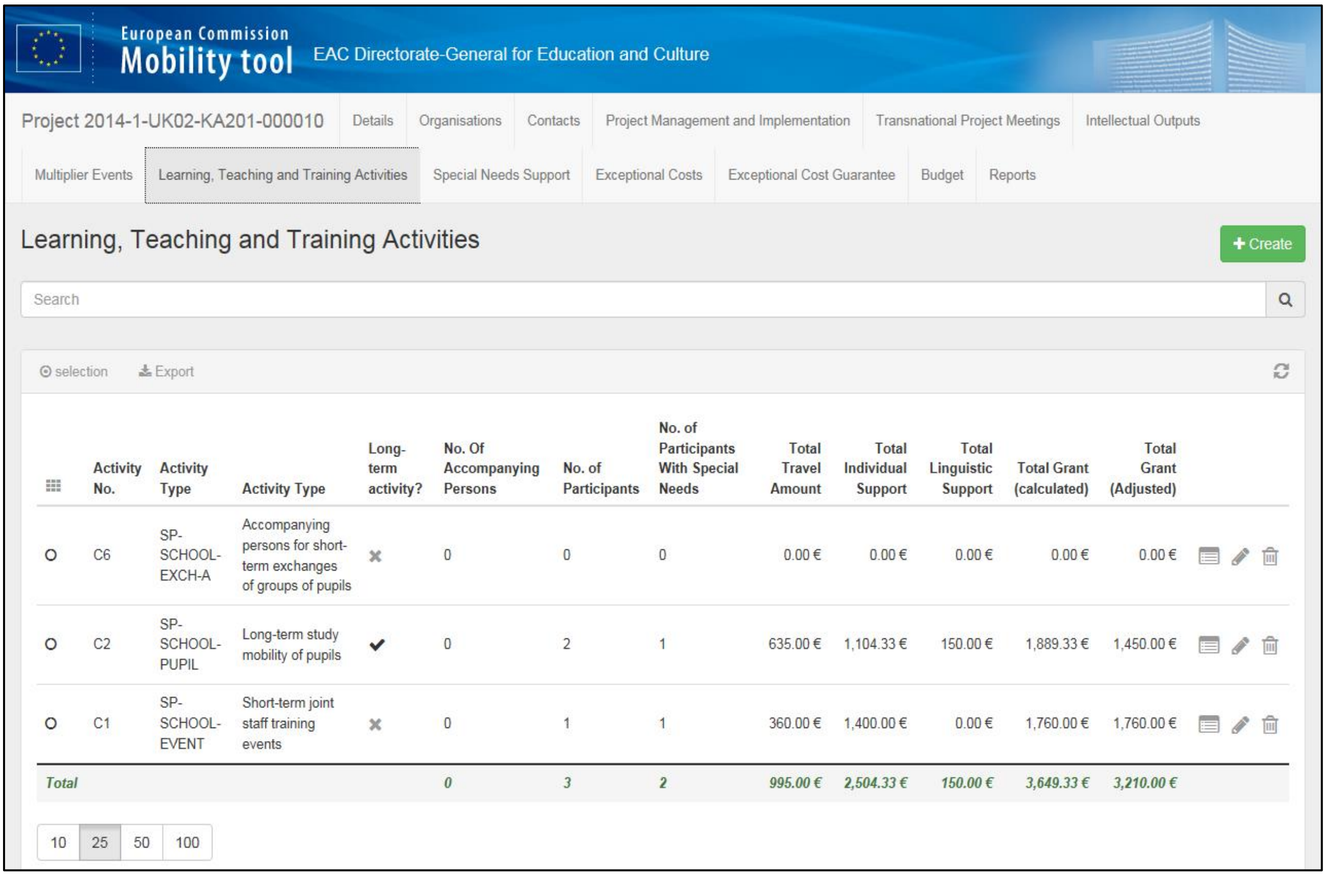
Available Features

 To view the event

 To edit the event

 To delete the event

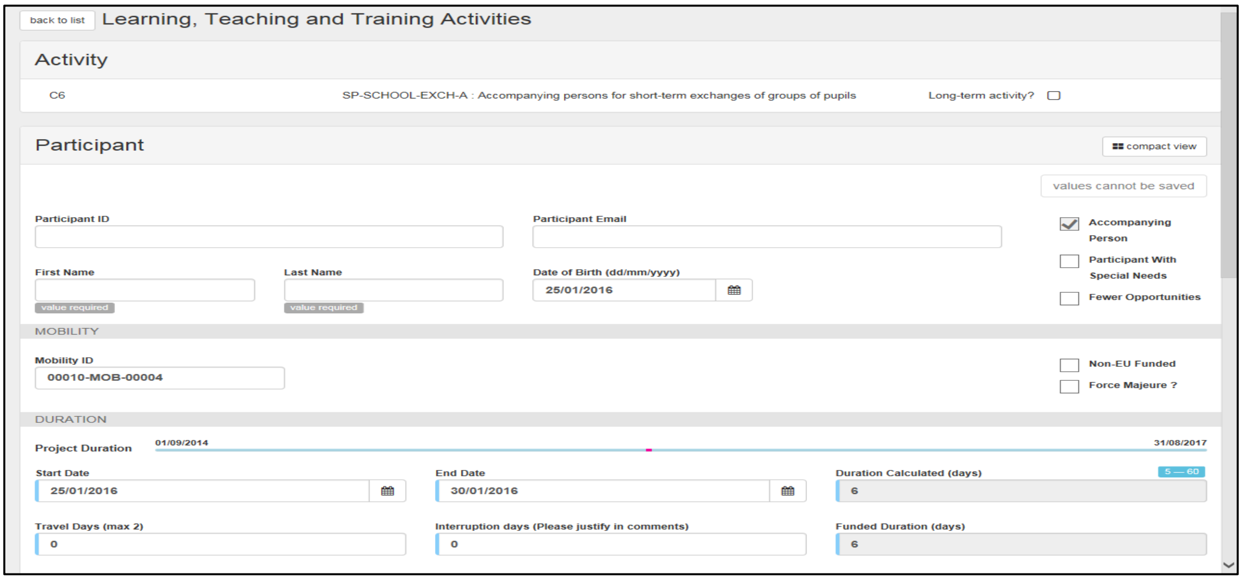
To view, edit and add, Learning, Teaching and Training Activities please select the 'Learning, Teaching and Training Activities' tab in the top toolbar You will then see the screen below.



	Activity No.	Activity Type	Activity Type	Long-term activity?	No. Of Accompanying Persons	No. of Participants	No. of Participants With Special Needs	Total Travel Amount	Total Individual Support	Total Linguistic Support	Total Grant (calculated)	Total Grant (Adjusted)
O	C6	SP-SCHOOL-EXCH-A	Accompanying persons for short-term exchanges of groups of pupils	✖	0	0	0	0.00 €	0.00 €	0.00 €	0.00 €	0.00 €
O	C2	SP-SCHOOL-PUPIL	Long-term study mobility of pupils	✔	0	2	1	635.00 €	1,104.33 €	150.00 €	1,889.33 €	1,450.00 €
O	C1	SP-SCHOOL-EVENT	Short-term joint staff training events	✖	0	1	1	360.00 €	1,400.00 €	0.00 €	1,760.00 €	1,760.00 €
Total					*0*	*3*	*2*	*995.00 €*	*2,504.33 €*	*150.00 €*	*3,649.33 €*	*3,210.00 €*

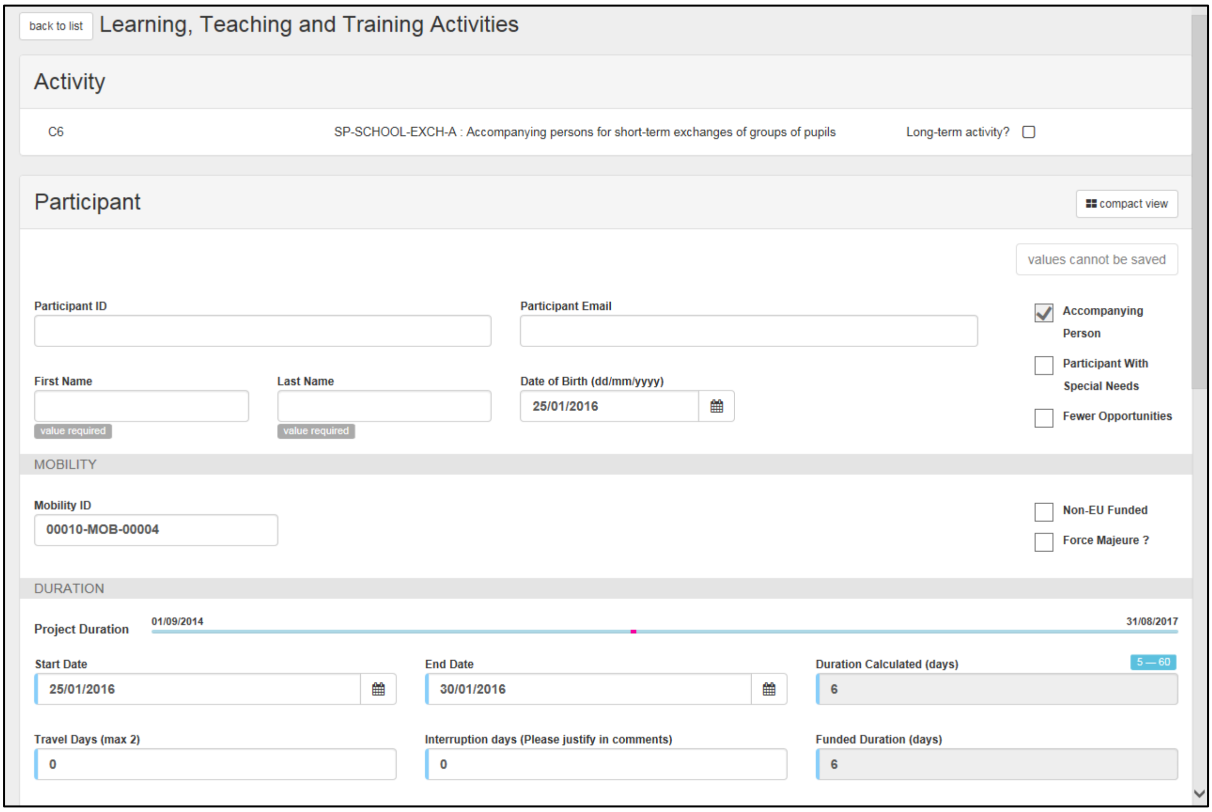
Create New LTT Activity

To create a new activity, select the **+ Create** button. You will then see the pop up screen below:



For each Learning, Teaching and Training Activity you must choose a corresponding activity number and activity type from the drop down menus. These correspond to the activity numbers stipulated in your organisation's application form. You should also indicate whether it is a long term activity by ticking the box at the end of the row. You must then provide a narrative description of the activity. Here you need to detail how any activities delivered contributed to the achievement of the overall project objectives. It should be clear from each activity that it adds value and contributes to the overall objectives. If applicable, please indicate how the learning outcomes from these learning, teaching or training activities have been recognised and validated. If appropriate, please detail which European or national mechanisms were used to do this.

Once all required data has been entered a Save button will appear in the right corner of the screen. Please select this button to save the data you have input. Once this has been done, a new section will appear called 'Participants'. Select the + Create button to the right of the form. You will then be taken to a new screen (screenshot below) where you must provide information on participants, completing all of the required fields.


back to list Learning, Teaching and Training Activities

Activity

C6 SP-SCHOOL-EXCH-A : Accompanying persons for short-term exchanges of groups of pupils Long-term activity?

Participant

compact view

values cannot be saved

Participant ID

Participant Email

Accompanying Person

First Name

value required

Last Name

value required

Date of Birth (dd/mm/yyyy)

25/01/2016

Participant With Special Needs

Fewer Opportunities

MOBILITY

Mobility ID

00010-MOB-00004

Non-EU Funded

Force Majeure ?

DURATION

Project Duration 01/09/2014 31/08/2017

Start Date

25/01/2016

End Date

30/01/2016

Duration Calculated (days) 5 — 60

6

Travel Days (max 2)

0

Interruption days (Please justify in comments)

0

Funded Duration (days)

6

Enter the participant ID, email, first/last name and the participant's date of birth.

Select one of the participant types (if applicable) by ticking one of the boxes from the list to specify whether they are:

- an accompanying person
- a participant with special needs
- a participant with fewer opportunities.

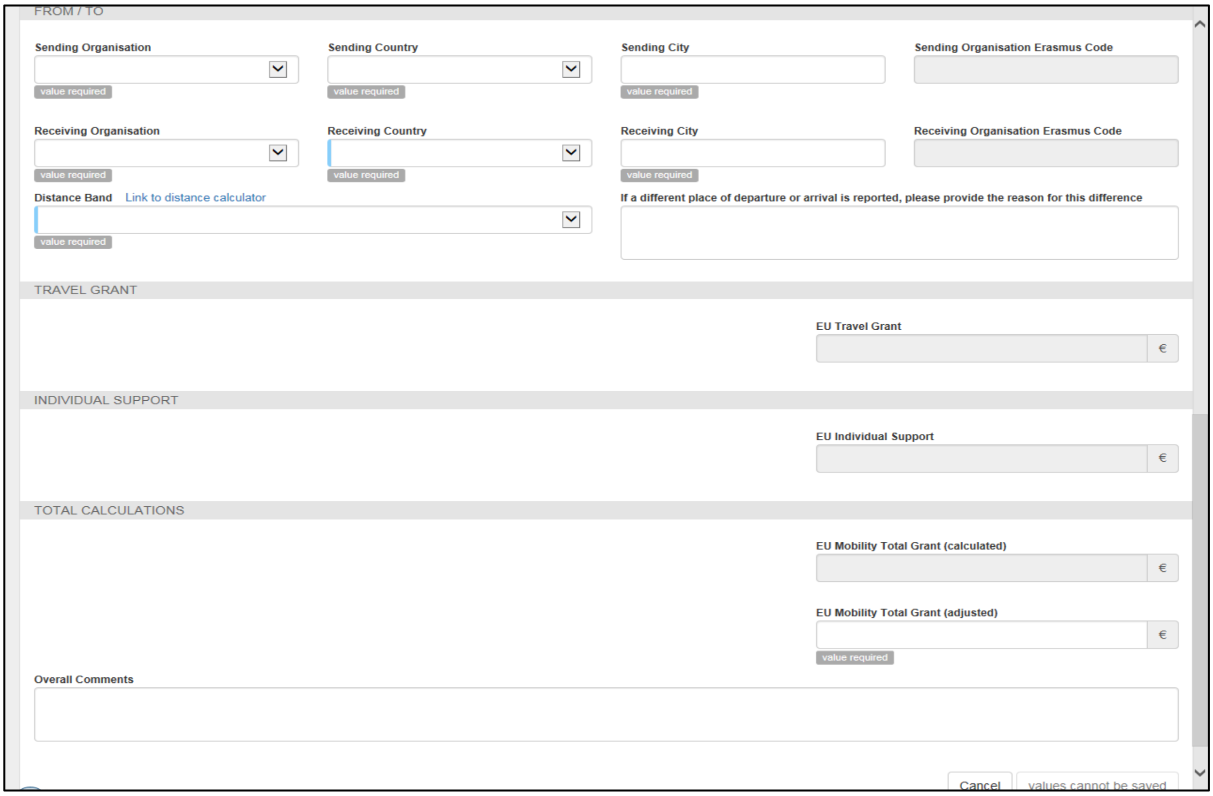
Please do not forget to tick the 'long term activity' box at the top of the screen, if applicable.

If applicable, you should select one of the boxes if the participant is:

- **Non-EU Funded –** if you will not be claiming a unit cost contribution for this participant. This may occur if you are taking additional participants beyond the number of participants you approved funding for.
- **Due to force majeure unable to complete the activity** – you should only select this box if it has been approved by the UK National Agency.

You should then enter the duration of the activity by selecting the start and end date. Please note that Learning, Teaching, Traning Activities all have a minimum and maximum duration, which must be adhered to. You should also stipulate the travel days and interruption days (where applicable). The total duration and the funded duration will be automatically calculated and will appear to the right of the screen.

Sending and receiving organisations must be chosen from the dropdown menu. The corresponding country will populate automatically based on this selection. You should choose the relevant distance band, which will allow the Mobility Tool+ to automatically calculate the relevant grant rate. Please ensure that you use the European Commission's distance band calculator to establish the correct distance band. If you wish to request less funding than the calculated amount in the Mobility Tool+, you should populate the 'EU total grant adjusted' field.


FROM / TO

Sending Organisation	Sending Country	Sending City	Sending Organisation Erasmus Code
value required	value required	value required	

Receiving Organisation	Receiving Country	Receiving City	Receiving Organisation Erasmus Code
value required	value required	value required	

Distance Band Link to distance calculator

value required

If a different place of departure or arrival is reported, please provide the reason for this difference

TRAVEL GRANT

EU Travel Grant €

INDIVIDUAL SUPPORT

EU Individual Support €

TOTAL CALCULATIONS

EU Mobility Total Grant (calculated) €

EU Mobility Total Grant (adjusted) €

value required

Overall Comments

Cancel values cannot be saved

Once all required fields have been completed please select Save button at the bottom of the form on the right.

To view individual activities please select the icon at the end of the individual row.

To delete an activity please select the icon, and then select 'delete' in response to the prompt box that appears on the screen.

Special Needs Support

Available Features

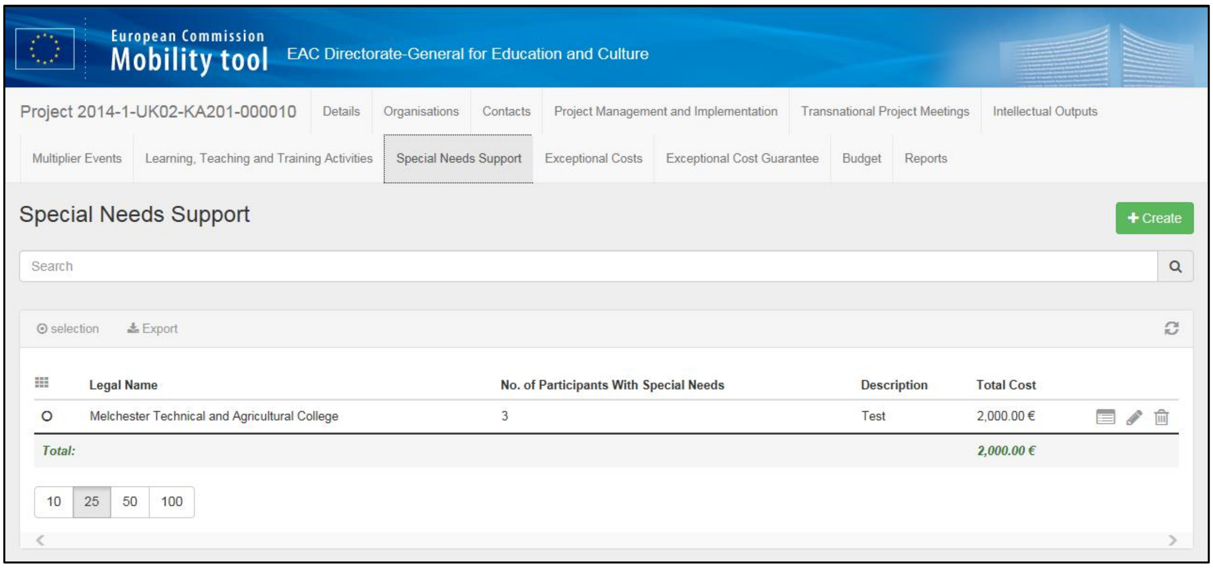
To view the event

To edit the event

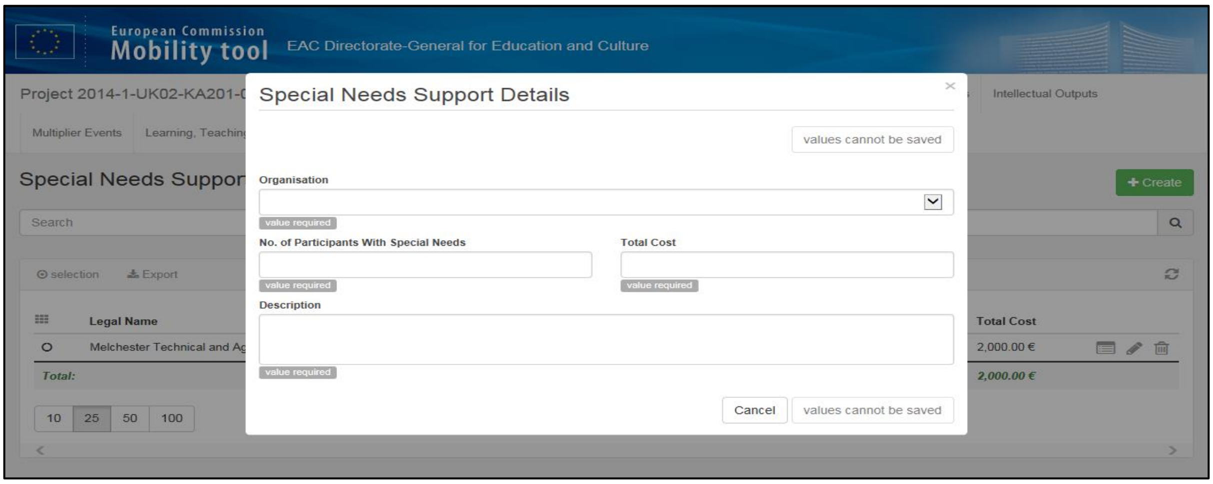
To delete the event

Create Special Needs Support

To enter the costs for participants with special needs select the + Create icon (as below):



Once ' + Create is selected a pop up form will appear on the screen (see screenshot below):



On this screen, you must select the sending organisation for the mobility. You can input and amend information about the number of participants with special needs and the total cost of any Special

Needs Support associated with the mobility of that individual, provided these costs were approved with the UK National Agency.

Please then enter a narrative description of these costs in the description field; please note this is limited to 2000 characters. The individual's situation should be described and the particular needs and extra costs attached to it should be detailed in this section.

Once these fields have been completed please select the Save button in the bottom right corner of the form to save the data.

To view details of Special Needs Support, please select the icon at the end of the individual row.

To delete Special Needs Support details please select the icon, and then select 'delete' in response to the prompt box that appears on the screen.

Exceptional Costs

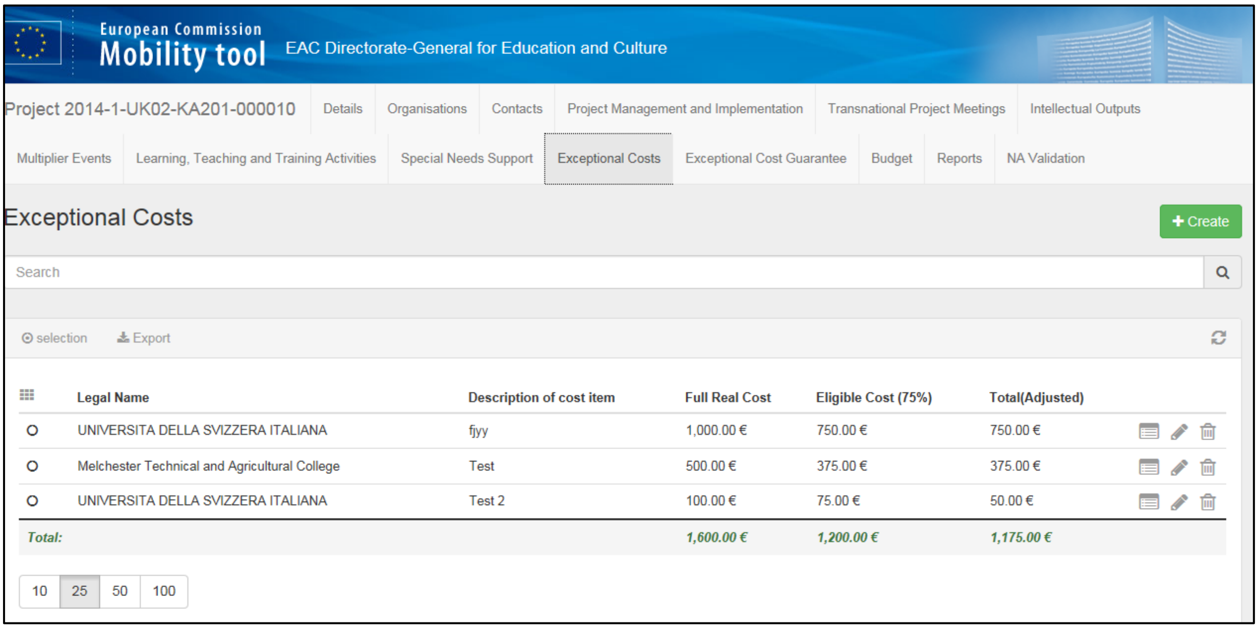
Available Features

To view the event

To edit the event

To delete the event

ERASMUS+
CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE



Once the Exceptional Cost tab is selected on the top toolbar, you will be able to view the list of organisations involved in the project. You will also be able to see the amounts which were approved for each organisation. Approved amount can also be found in the project Grant Agreement. The budget will already be populated. This information is fed from the Erasmus+ database based on approved requests from the application form. Here you need to report on the actual costs incurred. The UK National Agency will reimburse 75% of the eligible costs actually incurred up to €50,000,.

This section is divided into five columns as below:

1. **Legal Name** - the legal name of the organisation
2. **Description of cost item**
3. **Full real cost** - represents full real cost which was approved and this is editable
4. **Eligible cost (75%)** - represents 75% of the amount which was original requested, this cost is not editable and it is calculated on the basis of amount inputted into the full real cost column
5. **Total (Adjusted)** - contain the total figure which will be created on the basis of amount entered into the real cost column applying the 75% rule in the eligible cost column.

To remove or add columns within the list of the exceptional costs for the organisations involved in the project, you will need to use icon. When you click on this icon, a list of options will display. You can then select the information you want to display on the main 'Exceptional Cost' screen.

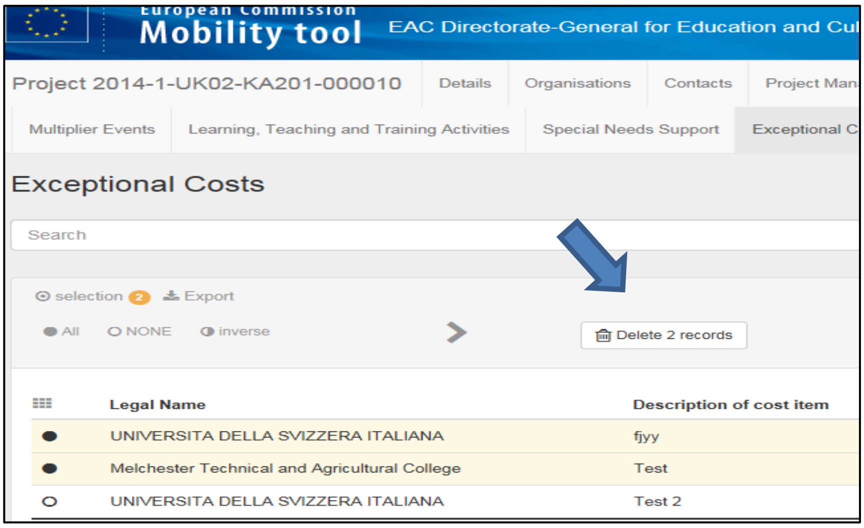
To view the any organisations' Exceptional Costs, click on the view icon next to the organisation you want to review. The Exceptional Costs details' window for the selected organisation will display.

Create Exceptional Costs

If you wish to create a new Exceptional Cost, you need to click on the Create button. After you click on this button, a new window will open and you will be able to enter the data. Please make sure that mandatory fields are completed, otherwise it will not allow you to save it. Once all required information are completed, please save the new record.

To edit data in this section of the budget, click on the icon next to the exceptional cost that you wish to edit. This will open the record of that particular exceptional cost for the selected organisation. You will then be able to edit the data. If you exceed the figures, a message will appear underneath the column highlighted in red. The message will state 'to high, out of range'.

If you wish to delete any of the exceptional costs, click on the delete icon next to the exceptional cost of the organisation you wish to delete. The message 'Are you sure you want to delete selected item(s)?' will pop up. By pressing delete, you will delete this record permanently. Please make sure that you carefully check the selected record before deleting as this change is not reversible. You can delete multiple records by selecting multiple Exceptional cost items and pressing 'Delete' (see screenshot below).

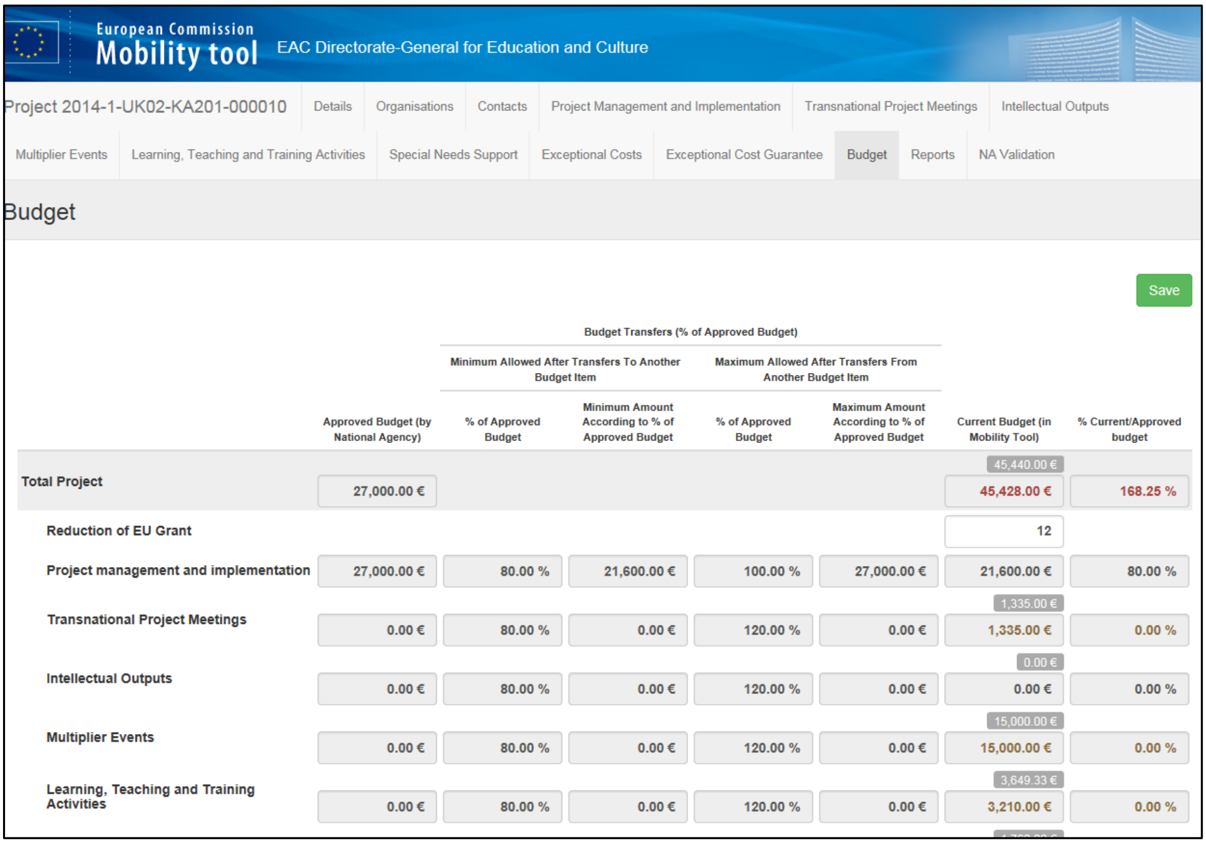


Exceptional Cost Guarantee

This cost only relates to projects under the 2015 call onwards. Projects under the Call 2014 were not able to apply for the Exceptional Cost Guarantee and then you should not entre any expenditure on this tab on the Mobility Tool+.

Budget

The Budget section of the Mobility Tool + provides a summary of the financial details of the project against each of the budget headings. This section displays the current budget based on the information in the Mobility Tool +, as well as the budget approved by the National Agency that is detailed in your Grant Agreement (see below).



		Budget Transfers (% of Approved Budget)					
		Minimum Allowed After Transfers To Another Budget Item		Maximum Allowed After Transfers From Another Budget Item			
	Approved Budget (by National Agency)	% of Approved Budget	Minimum Amount According to % of Approved Budget	% of Approved Budget	Maximum Amount According to % of Approved Budget	Current Budget (in Mobility Tool)	% Current/Approved budget
Total Project	27,000.00 €					45,440.00 € 45,428.00 €	168.25 %
Reduction of EU Grant						12	
Project management and implementation	27,000.00 €	80.00 %	21,600.00 €	100.00 %	27,000.00 €	21,600.00 €	80.00 %
Transnational Project Meetings	0.00 €	80.00 %	0.00 €	120.00 %	0.00 €	1,335.00 € 1,335.00 €	0.00 %
Intellectual Outputs	0.00 €	80.00 %	0.00 €	120.00 %	0.00 €	0.00 € 0.00 €	0.00 %
Multiplier Events	0.00 €	80.00 %	0.00 €	120.00 %	0.00 €	15,000.00 € 15,000.00 €	0.00 %
Learning, Teaching and Training Activities	0.00 €	80.00 %	0.00 €	120.00 %	0.00 €	3,649.33 € 3,210.00 €	0.00 %

The National Agency recommends that you regularly check the Budget section of the Mobility Tool+ to help you financially manage your project. For this purpose the Mobility Tool+ also includes a column that displays the percentage of your current budget against the approved budget. If you go over your approved budget for any heading, the amount will be shown in red.

Most of the cells in the Budget section are grey and cannot be manually amended. **If there is an error in the 'Approved Budget' column, please contact the UK National Agency immediately.** The information provided in the 'Current Budget' column is generated from the data you have input in the corresponding tabs within Mobility Tool+. This is why most of the cells are greyed out. If you notice an error you should return to the individual budget headings and check that the information is accurate.

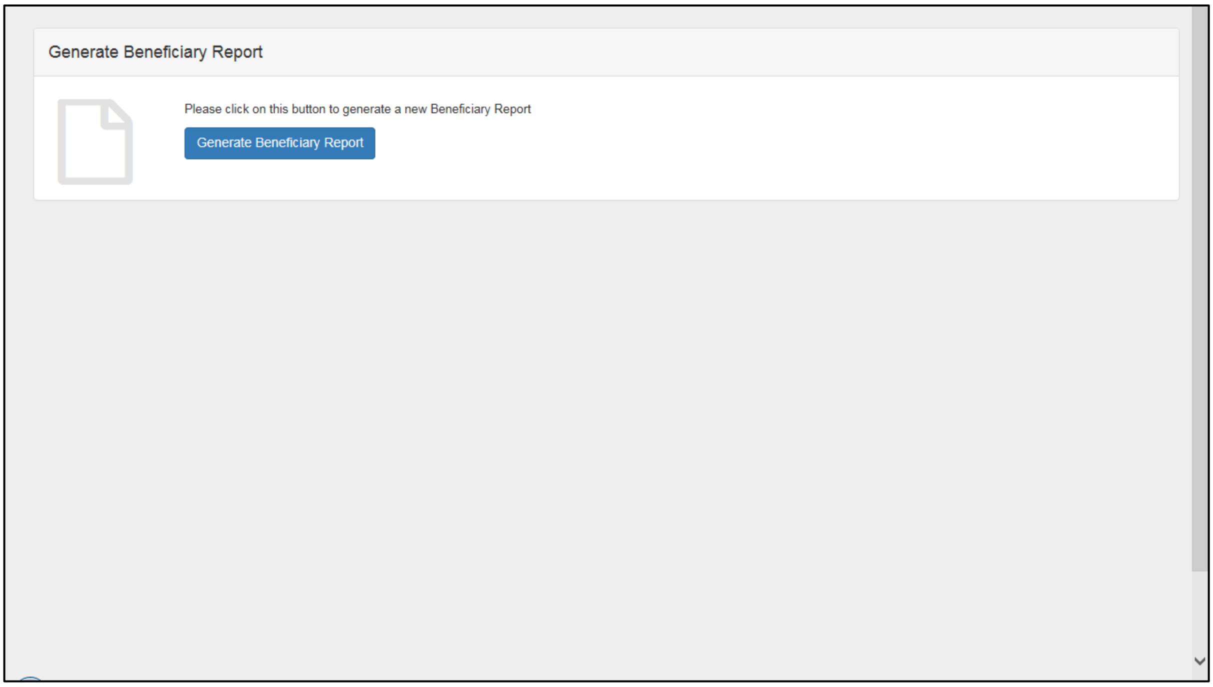
Any cells that are white need to be filled in manually. For example, the white fields shown under 'Exceptional Cost' and 'Exceptional costs – Guarantee' need to be manually completed.

You should ensure that information in the Budget section of the MT+ is accurate and kept up-to-date throughout the lifetime of your project.

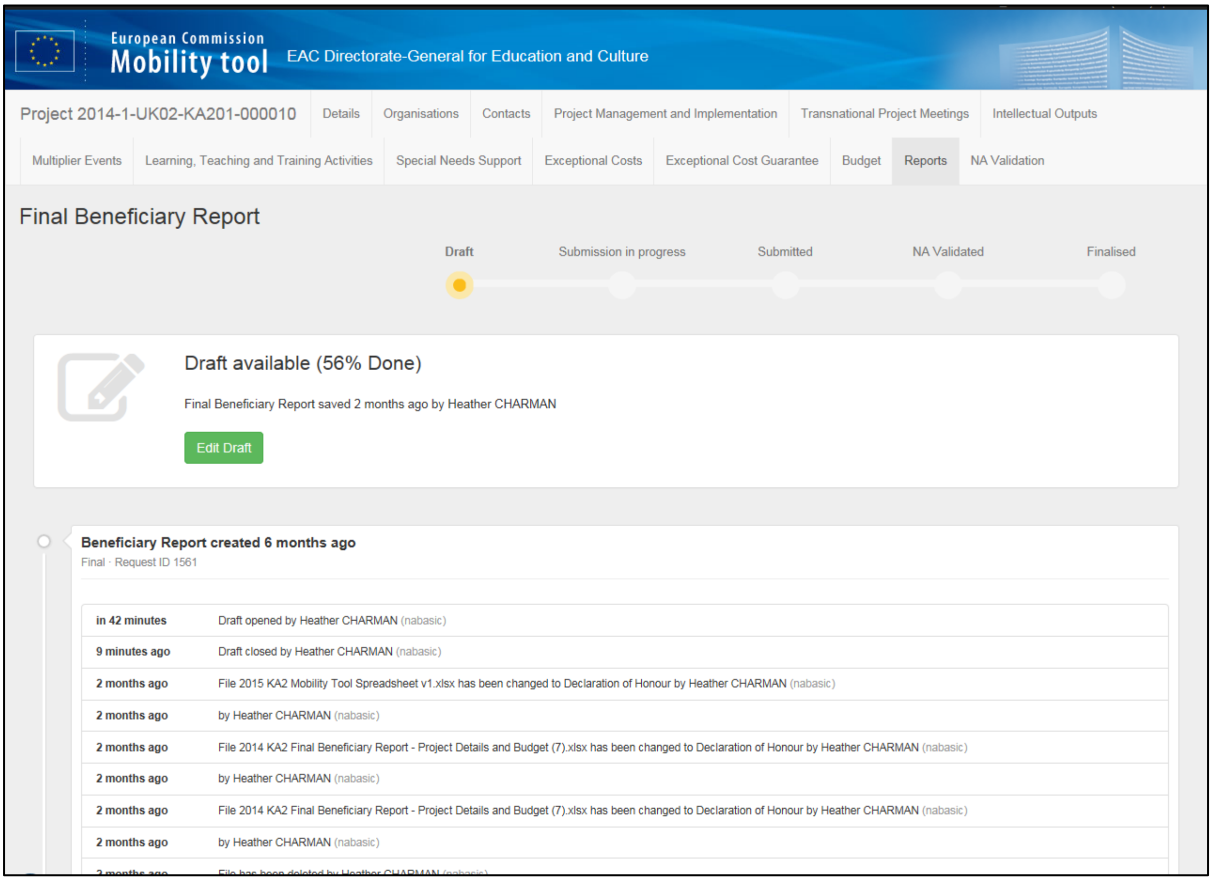
Reports

You can generate the final Benificiary Report for your project under the 'Reports' section of the Mobility Tool+. This Beneficiary Report must be submitted within 60 days of the end date of your project. You can confirm the deadline for the submission of this report in your organisation's Grant Agreement.

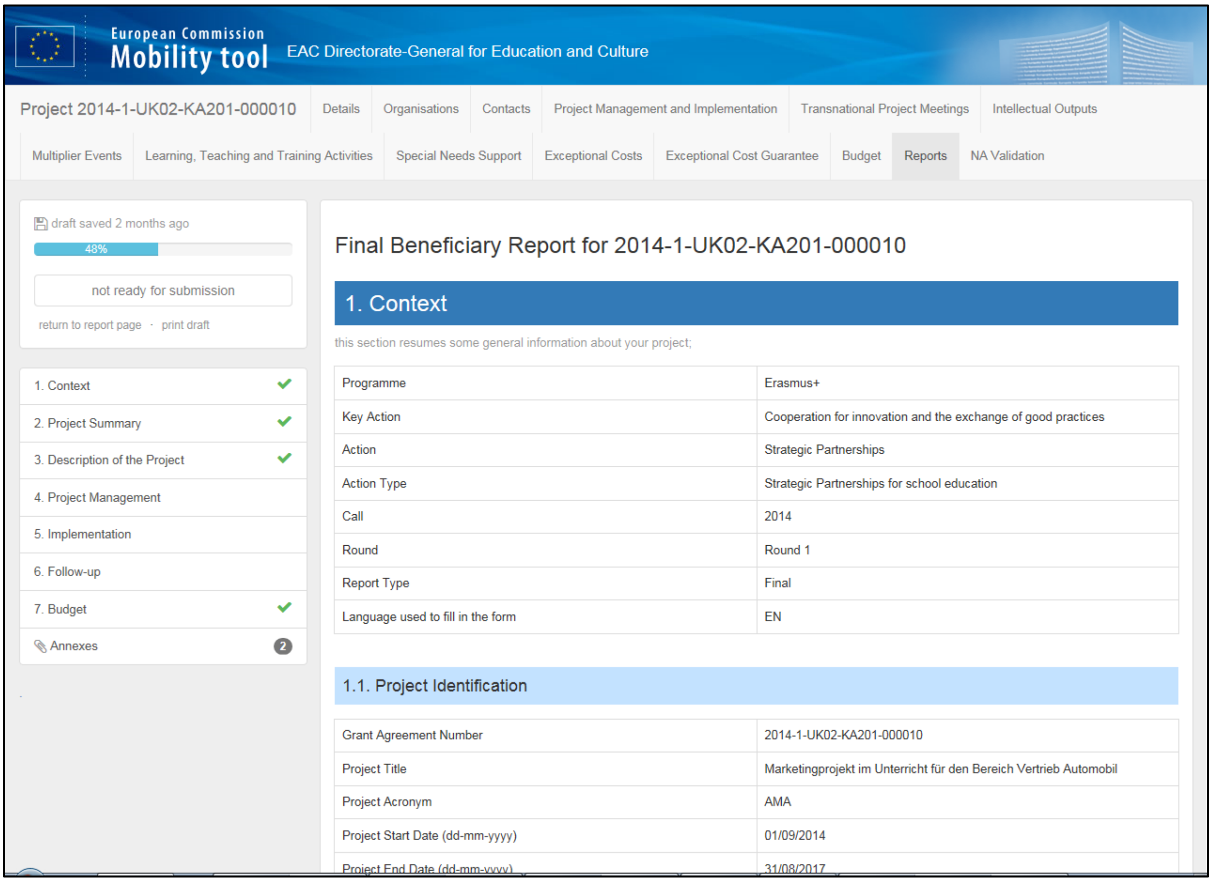
Before generating the Beneficiary Report, ensure that all budget subheadings for your project are correctly completed and confirm that the organisational and financial information is correct in the 'Budget' section of the Mobility Tool+. When you are ready to generate the report, go to the 'Reports' tab and click the 'Generate Beneficiary Report' button (see screenshot below):



If this if the first time the report has been generated, you will receive a message confirming the report has been generated. This will create a draft version of the report and an ‘Edit Draft’ button will show on screen. Click the ‘Edit Draft’ button to make amendments to an existing version of the Beneficiary Report:



Please note that the report is completed within the MobilityTool+ and there is no file to download. When you select ‘Edit Draft’ and open the report there is a navigation pane on the left which shows the status of the report, when it was last saved, and the headings for each section. You can click each heading to navigate to that section of the report (see screenshot below):



General project information is covered by the ‘Context’ and ‘Project Summary’ sections of the report and these sections have been automatically completed within the Mobility Tool+. Please ensure that you check these sections of the report to ensure that all information is up to date. The qualitative and evaluative information sections form the majority of the report and are split over several sections.

More information about completing these sections of the report will be available in a separate ‘Final Report Beneficiary Guidance’ document which will be available on the Erasmus+ website in due course. The ‘Budget’ section of the report covers financial aspects of the project and is automatically populated in the Mobility Tool+, using the information from the ‘Mobilities’ and Budget sections. There is also an Annexes section at the end of the report where you can upload any supporting documents.

You should refer to the Final Report Beneficiary Guidance when available and your Grant Agreement to confirm which documents you need to upload (if any). Please be aware that you may be unable to upload files that are considerably large in size. If you have any difficulties uploading documents you should contact the UK National Agency..

When the report is complete and ready for submission, a ‘Start Submission Process’ button show in the navigation pane at the top left corner of the page.

Key Action 3

Introduction

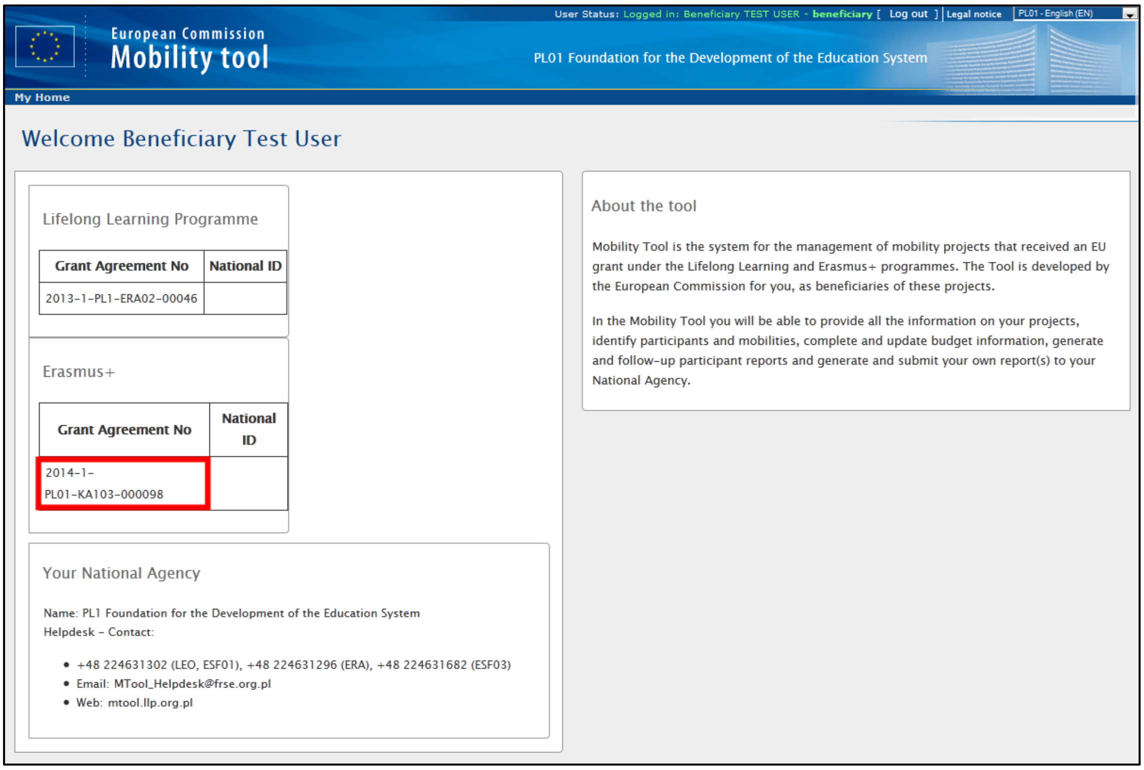
The reporting requirements for Key Action 3 involve reviewing the information relating to participants, mobilities, the project’s budget, and the reporting requirements.

This will include identifying participants, completing and updating budget information, and completing and submitting reports to the UK NA.

Project Details

When you log in to the Mobility Tool+, and click on ‘Projects’, you will see a list of projects for your organisation. If your organisation had projects under the Lifelong Learning Programme you will see these as well as any Erasmus+ projects. If you have more than one Erasmus+ project, you can identify your Key Action 3 projects by the grant agreement number. All Key Action 3 projects have ‘KA3’ in the grant agreement number.

You can click on a project's ‘Grant Agreement No.’ to see the project details. If you have a lot of projects you can quickly find an individual project using the in-built search function in your browser by pressing ‘Ctrl’ and ‘F’ on your keyboard and typing the grant agreement number. This project will then be highlighted.



Once you have clicked on your grant agreement number, basic information regarding this project will be on the screen (as shown below), and there will be a toolbar with options to navigate through your project information. This toolbar is for easy access to different sections and will stay in place throughout all sections.

There will be 4 sections displayed as follows:

Context – This section holds a basic overview of your project details, such as which key action you have applied under, and in what year.

Project Information – This section displays specific information regarding unique coding for your project.

Beneficiary Organisation – This section displays information based on the lead organisations details.

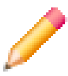
History Information – This section displays information regarding when your project was created in MT+ and when it was last updated.

Organisations

From the organisations section of MT+ you can see a list of organisation that are taking part in the project. This section of the guide covers how to access the list of organisations and how to amend this information.

List Organisations

Available Features

	Select all organisations in list
	Add new organisation
	Delete selected organisation
	Export list of organisations as Excel/CSV file.
	Print list of organisations
	Add/remove columns from list
	Search for information in the list
	Reset filters and/or clear search results
	Edit organisation information

After logging in to the MT+ and accessing the relevant project you will need to select the 'Organisations' tab from the toolbar and choose 'List Organisations'. This will display a list of the organisations involved with the project and some basic information, such as the name, PIC and country of each organisation. Your organisation will be marked as the beneficiary. To view the full details for an organisation, click the ‘Legal Name’ of the organisation. This will display information about the organisation and its contact details. When you first access a project in MT+ all the organisations that were included in the original application form and confirmed during the contracting stage will have been automatically uploaded.

Create New Organisation

MT+ has the facility for you to add new organisations and amend or delete organisations that are already included in the project. You **should not** use the features to add or delete organisations unless advised to do so by your project officer. If you add an organisation to the MT+ which is not included in your grant agreement, **all associated costs to this organisation will be deemed ineligible**.

To amend the information regarding an organisation, go to the list of organisations and click the icon for the relevant organisation. A partner details form will appear with fields relating to organisation information, address and contact information, and comments. You’ll notice that the majority of the fields are grey and cannot be manually changed. The table shows which fields you can edit manually and which fields will be updated from the Participant Portal.

Field	Description	Update from Participant Portal	Update Manually
PIC	The Participant Identification Code from the Participant Portal. This is unique for each organisation.		✓
Organisation ID	The unique identifier for an organisation in the MT+. This is automatically generated but can be manually changed.		✓
Legal Name	The legal name of the organisation in Latin characters.	✓	
Business Name	The trading name of the organisation. This may be different to the legal name.	✓	
Full legal name (National Language)	The legal name of the organisation in the National Language in which it’s based.	✓	

Field	Description	Update from Participant Portal	Update Manually
Acronym	The official acronym of the organisation.		✓
National ID (if applicable)	The business registration number or other national identifier of the organisation.	✓	
Department (if applicable)	Please enter the department in which your organisation sits		✓
Type of Organisation	A dropdown menu for the ‘legal form’ of the organisation	✓	
VAT	The Value Added Tax (VAT) number of the organisation.	✓	
Co-Beneficiary	Other organisations within the UK consortium		✓
Public Body	A tick box to indicate whether the organisation is a public body.		✓
Non-profit	A tick box to indicate whether the organisation is non-profit.		✓
Legal Address	The street name and number of the organisation.	✓	
Country	The country where the organisation was established.	✓	
Region	The region/county where the organisation was established.	✓	

Field	Description	Update from Participant Portal	Update Manually
P.O. Box	The P.O. Box number of the organisation.	✓	
Post Code	The postal/zip code of the organisation's legal address.	✓	
CEDEX	This is only applicable for France.	✓	
City	The city where the organisation was established.	✓	
Email	The email address of the organisation.	✓	
Website	The website of the organisation.	✓	
Telephone 1	The main telephone number of the organisation.	✓	
Telephone 2	A secondary telephone number of the organisation.	✓	
Fax	The fax number of the organisation.	✓	
Organisation Comments	Any additional notes or remarks about the organisation		✓

To update information manually, input the data into the relevant field. To update information from the Participant Portal click the 'Check PIC' button to update the details for the organisation. In both instances, check the updated information and click 'Save' to save your changes.

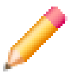
You can only amend the information about your partners. If you need to amend information about your own organisation you should refer to the contract amendment procedure as issued to you by the UK NA.

Contacts

From the contacts section of MT+ you can see a list of contacts that are involved with the project. This section of the guide covers how to access the list of contacts and how to amend this information.

List Contacts

Available Features

	Select all contacts in list
	Add new contact
	Delete selected contact
	Export list of contacts as Excel/CSV file.
	Print list of contacts
	Add/remove columns from list
	Search for information in the list
	Reset filters and/or clear search results
	Edit contact information

To see the contacts involved with the project you will need to select the 'Contacts' tab from the toolbar at the top of the screen and choose 'List Contacts' from the dropdown menu. This will display a list of any contacts that have been added from across the organisations involved in the project. Here you can see basic information including the name, telephone number, email address and the name of organisation for each person. You can also see whether they are the legal representative or a preferred contact for the project and whether they have access to MT+. When you access a project for the first time in MT+ the details for the contact person and the legal representative for the beneficiary organisation included in the original application form and confirmed during the contracting stage will have been automatically uploaded.

Please note: when the project is imported to MT+ both the authorised contact person and the legal representative will automatically be given access to the project on MT+. It is advised that access to the project is limited to just the contact person and legal representative. However, you may add additional contacts from the beneficiary organisation and allow them access to the project. If additional access to the MT+ is granted, it will still be the responsibility of the authorised contact person and the legal representative to ensure the data in the MT+ is up to date and accurate. You can use the Project Details section of MT+ to see when the MT+ was last updated and by which contact.

To view the full details for a contact, click the icon next to the person's name. To amend any of these details click the icon above the contact details. You will be able to navigate through the details stored for this person, making any changes as necessary. You can also choose to send an invitation by email for this person to access MT+. Please ensure that you click "Save" following your amendments.

To delete a contact you will need to return to the list of contacts. The first column in the list has a check box for each contact. You will need to click this box for the contact you want to delete and click the icon. **Please note:** there is no confirmation box and this will permanently delete the contact from MT+.

Add New Contact

To add a new contact you should choose 'Create a new Contact' from the dropdown menu of the 'Contacts' tab from the toolbar at the top of the screen. You will need to fill in all of the required fields marked with a red asterisk. To give the new contact access to MT+ select the ‘Access to Project’ check box after inputting all the necessary details to send an email to the person with an invitation to access the project. When you have finished click ‘Save’ to add the new contact.

Mobilities

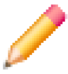
From the Mobilities section of MT+ you can see a list of mobilities for the project. This section of the guide covers how to access the list of mobilities and how to create a new mobility. **Please note:** before creating any mobilities please ensure that all of the sending and receiving organisations are included in the list of organisations. If one of your partners seems to be missing, please contact your project officer.

When you first access a project this section of MT+ will have no mobilities listed. This is the main section you will use to input data about your project. The information you input here will be used to pre-populate sections of the final report for your project so it is very important that it is accurate.

List Mobilities

Available Features

	Select all mobilities in list
	Add new mobility
	Delete selected mobility
	Export list of mobilities as PDF file
	Export list of mobilities as Excel/CSV file
	Print list of mobilities

	Add/remove columns from list
	Search for information in the list
	Reset filters and/or clear search results
	Edit contact information

You will be able to see any mobilities you have added when you click ‘List Mobilities’ from the ‘Mobilities’ section of the toolbar. This page will list all participants with a mobility, with some basic information including the name and email address of the participant, information about the mobility such as the activity type and the activity start and end dates. To show more detailed information relating to an individual participant and their mobility, click the  icon next to the participant’s name on the left hand side of the screen. This will allow you to view information relating to the sending and receiving locations, the participant details, and the budget for this mobility. If you need to change any of the information, click the  icon above the mobility information to go to the Mobility Form. You can now amend any information as necessary and click ‘Save’ when finished.

If you need to delete a mobility you should return to the list of mobilities. Click the checkbox next to the name of any participants you want to delete and then click the  icon. **Please note**: A warning message “Are you sure you want to delete this mobility?” will be displayed. Click “OK”. A confirmation message “the record has been deleted successfully” will be displayed and the selected mobility won’t appear in the list of mobilities.

Create New Mobility

To add a new mobility click the  icon. This will take you to the Mobility Form where you can input all the necessary information relating to the activity, participant, sending and receiving locations, budget and recognition of learning outcomes. You will need to complete all sections marked with a red asterisk as a minimum and calculate the budget before you can save the mobility.

You will need to select the activity type from the dropdown menu and specify whether it is a National youth meeting or Transnational youth meeting.

You will now need to input all the information relating to the mobility. This includes information about the partner organisations and the information needed to calculate the budget.

You will need to select the sending and receiving organisations from the relevant dropdown lists. The country and city information for each organisation will be pre-filled based upon the information from the 'Organisations' section of MT+. However, this information can be changed and there is a comments box to explain any differences in location.

Please note: If a partner you wish to select is not listed, it is likely that they are not part of your contract with the UK NA. Please review the 'Partners' section of this guidance note and contact your project officer at the UK NA before registering a new partner.

You will need to choose the correct distance band based upon the Distance Calculator which should match the information provided in the application form. The dropdown menu will not populate with the distance bands until you have completed the previous fields in the form. You do not need to input the travel grant amount as this will be calculated later.

For the start and end dates you should input the dates of the mobility itself, not including any days related to travel. For example, if the mobility starts on Monday 12 October 2015 and ends on Friday 30 October 2015 with participants travelling out on Sunday 11 October 2015 and returning on Saturday 31 October 2015, the start date would be 12/10/15 and the end date would be 30/10/15 with two days input under travel days. The fields relating to the duration of the mobility will be calculated later so you do not need to manually complete these.

You should also input any special needs support funding that was included in your grant amount and complete the comments box, if necessary. You can also indicate if the mobility has been affected by force majeure by clicking the relevant checkbox and inputting an explanation in the 'Mobility Comments' box at the end of the form. **Please note:** in the case of force majeure you should first contact your Project Officer at the UK NA.

Once you have input all the details relating to the mobility, you should click the 'Calculate' button. This will calculate the unit costs for travel and individual support based upon the information you have entered. If you need to change any details you can click the checkbox for 'Edit'. This will allow you to amend the information and recalculate the budget.

If applicable, enter any relevant certification for the participants in this mobility experience. Select the relevant certifying partner from the drop down menu and the relevant type of certification.

To choose languages used in this mobility, select the relevant language from the dropdown menu for 'Main Instruction/Work Language' and 'Other Used Language'.

When you have finished inputting all the information for the mobility, click 'Save' and a confirmation message stating that the new mobility experience has been added will be displayed.

Import/Export

The Import/Export section is accessed from the Mobilities dropdown menu. The feature allows you to import data using a spreadsheet rather than using the in-built form to create mobilities. You can also export a spreadsheet with the data of all the mobilities that have been added to the project.

The main purpose of the import feature is to enable beneficiaries of large-scale projects with a large number of participants to enter data into the MT+ in a more efficient way since multiple participants can be added at the same time. **This should be only used if you feel comfortable with using CSV format files in Excel, have a very large-scale project and need to add more than ten mobilities to a flow.** Otherwise, you should continue to use the in-built Mobility Form to add new mobilities in Mobility Tool+ itself.

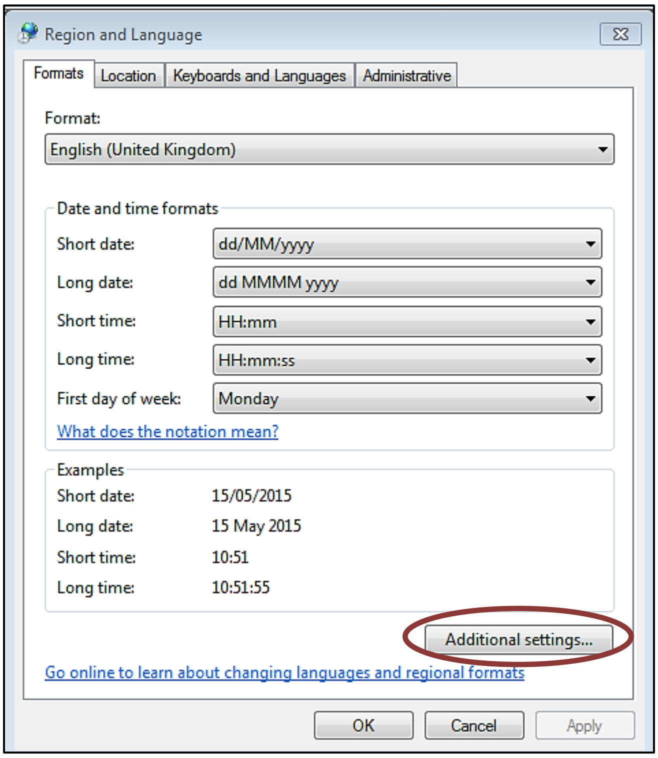
Before using the import function, the NA recommends that you first create a mobility using the Mobility Form within MT+. You can then export this data and use this as a foundation for adding new mobilities. When exported, data from MT+ is saved in CSV (Comma Separated Values) file format. **Please note:** Semicolon (;) is used as a default field separator and you may need to change the settings on your computer before exporting the data.

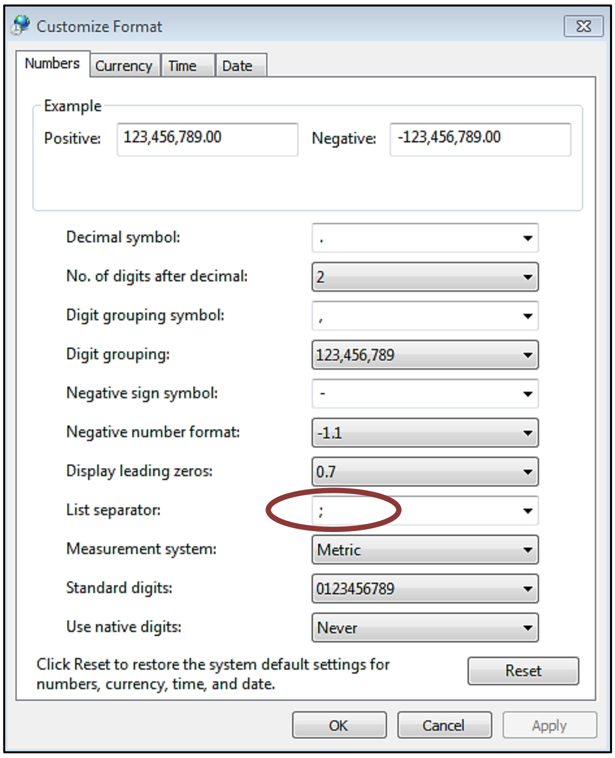
To check whether the field separator is already set to semicolon you will need to check the settings on your computer and change them if necessary.

ERASMUS+
CREATING OPPORTUNITIES FOR THE UK ACROSS EUROPE

How to change settings on Windows

From the start menu, go to Control Panel → Region and Language → Formats → Additional Settings and change List Separator to semicolon (;)





Please note: The NA cannot provide technical assistance to help you change the settings on your computer. If you experience difficulties or are using a different operating system you will need to speak to your organisation's IT department for further guidance.

The process of exporting data from the MT+ can be take some time and may result in a large file.

To successfully import mobilities you will need to use the Mobility Tool+ Data Dictionary. This can be downloaded from the Import/Export section of the MT+. The Data Dictionary includes guidance about how the mobility information should be encoded for the CSV file to allow the MT+ to understand the data. After you have added all the information for the mobilities you want to import you will need to save this as a CSV file locally on your computer. To import the information, you need to go to the Import/Export section of the MT+, click 'Browse' and select the file you have just saved.

The MT+ will now attempt to import the mobility data in the file. During this process the MT+ checks the information in the file to ensure that it's encoded correctly and meets the general requirements for the relevant Key Action, Field, and Activity Type. Once the MT+ has finished checking the data, the file will either be successfully imported or the MT+ will generate an Error Log to show what information needs to be amended.

Budget

The Budget section of the MT+ provides a summary of the financial details of the project against each of the budget headings. This section displays the current budget based on the information in the MT+ as well as the budget approved by the NA that is detailed in your Grant Agreement. The NA recommends that you regularly check the Budget section of the MT+ to help you financially manage your project. For this purpose the MT+ also includes a column which displays the percentage of your current budget against the approved budget. If you go over your approved budget for any heading, the amount will be shown in red.

Most of the cells in the Budget section are grey and cannot be changed manually. In particular, the cells in the 'Approved Budget' and '% Current / Approved budget' columns are greyed out and cannot be edited in the MT+. **If there is an error in the approved budget, please contact your project officer at the NA immediately.**

The information provided in the 'Current Budget' column is generated from the data you have input in the Mobilities section of the MT+ so most of the cells are also greyed out. If you notice an error you should return to the Mobilities section and check that the information here is accurate. Any cells that are white will need to be filled in directly in the Budget section. For example, the budget heading for 'Exceptional costs – Guarantee' needs to be manually completed. It should be noted that 'Exceptional costs – Guarantee' are the real costs incurred by the Beneficiary user to cope with any requests for a project guarantee by the NA. If the approved budget includes an amount for 'Exceptional costs', which are costs connected to consultations and opinion polls of young people, and for visa-related costs, residence permits and vaccinations, you should refer to your project officer for advice on how to enter these costs into MT+.

You should ensure that information in the Budget section of the MT+ is accurate and kept up-to-date throughout the lifetime of your project.

Reports

From the Reports section of the MT+ you can generate the Beneficiary Report for your project. This is the Final Report which will need to be submitted after the end date of your project. You can check the deadline for the submission of the report in your Grant Agreement.

Before generating the Beneficiary Report, make sure you have input all the participant information into the Mobilities section and checked that the organisational and financial information is correct in the Budget section. When you are ready to generate the report, go to the Reports section and click the Generate Beneficiary Report button. First, you will receive a message saying the report has been generated. This is a draft version of the report and an Edit Draft button will become available to allow you to complete the report.

The report is completed within the MT+ and there is no file to download. When you open the report there is a navigation pane on the left which shows the status of the report, when it was last saved, and the headings for each section. You can click each heading to navigate to that section of the report.

When you first open the report, some of the sections will have been automatically completed with information about your project from the MT+. The Beneficiary Report consists of three areas: general information about your project, qualitative and evaluative information about implementing the project, and financial information. The general information is covered by the Context and Project Summary sections of the report and this has been automatically completed by the MT+. The qualitative and evaluative information forms the majority of the report and is split into several sections. These sections will be tailored for the Key Action and Field of your project. More information about completing these sections of the report will be available in a separate Beneficiary Report Guidance document which will be available on the Erasmus+ website. The finance information is covered by the Budget section of the report and this has also been automatically completed by the MT+ using the information from the Mobilities and Budget sections. There is also an Annexes section where you can upload supporting documents. You should refer to the Beneficiary Report Guidance to check which documents you need to upload. Please be aware that you might not be able to upload files that are considerably large in size. If you have any difficulties uploading documents you should contact your project officer at the NA.

When the report is complete and ready for submission, the submit button will become available.

Further Information

Should you need any additional support or guidance in using the MT+ please contact your NA project officer (if applicable). Alternatively you can contact the NA by using the contact information below:

Higher education

Tel: 029 2092 4311* **Email:** erasmusplus.enquiries@britishcouncil.org

Vocational education and training

Tel: 0121 212 8947** **Email:** erasmusplus@uk.ecorys.com

Schools

Tel: 0161 957 7755* **Email:** erasmusplus.enquiries@britishcouncil.org

Adult education

Tel: 0121 212 8947** **Email:** erasmusplus@uk.ecorys.com

Youth - Key Action 1

Tel: 0161 957 7755* **Email:** erasmusplus.enquiries@britishcouncil.org

Youth - Key Action 2 and Key Action 3

Tel: 0121 212 8947** **Email:** erasmusplus@uk.ecorys.com

* Phone lines are open Monday to Friday, 8.30am to 5.30pm (UK time). Closed 11am to 12pm (UK time) on Wednesday.

** Phone lines are open Monday to Thursday, 9am to 5.30pm (UK time) and 9am to 5pm (UK time) on Fridays.