PROMAS MANUAL
FOR APPLICANTS

- Registration for Call for Proposals
- Manage User Rights
- Filling in Application Form
- Submission of Application
- View Grant Contract

Version: 1.0.

23.1.2017

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INTRODUCTION

PROMAS is an electronic Programme Management System, which is used during the whole Project cycle. The system is used for submitting the Applications, Interim and Final reports, Payment requests, Amendment requests, Project updates etc. In addition to the electronic version, certain documents have to be submitted to Managing Authority also as a **signed hard copy**.

The main goal of this document is to demonstrate the technical instruction of filling in the Application in PROMAS whereas the instruction on the content of the Application is presented in the **Guidelines for the Call for Proposals**.

Before filling in the Application in PROMAS, it is recommended to fill in the **Annex A: Project Budget**. Annex can be found on the Programme web page http://www.kolarctic.info/.

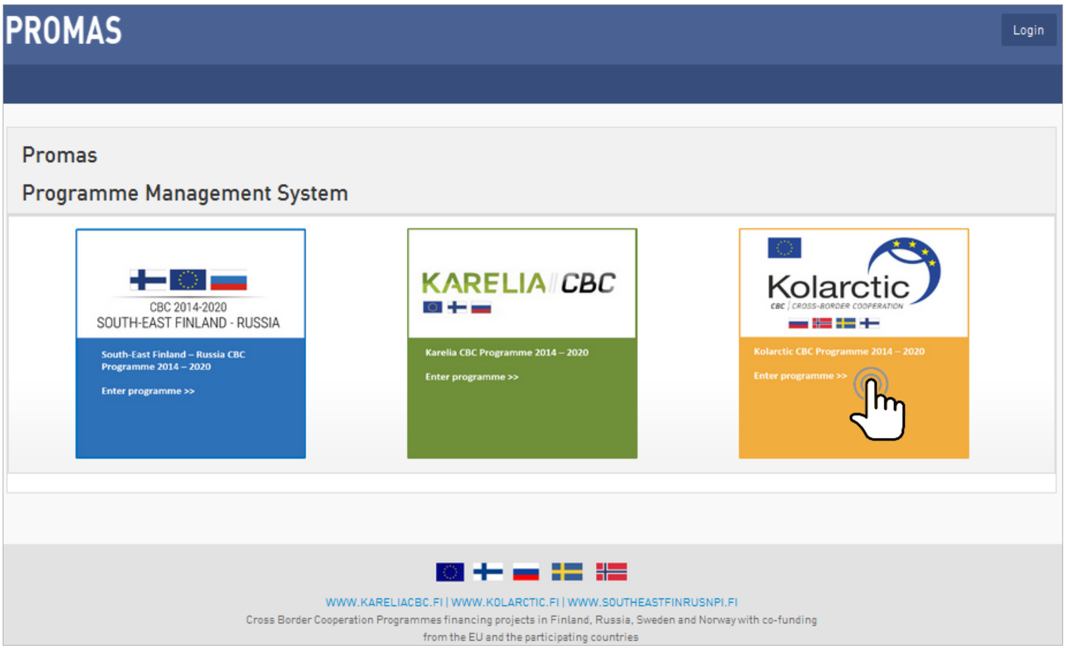
Pay attention to the following:

- The Application must be completely **filled in English.**
- Only the **Lead Partner** registers and fills in the Application in the PROMAS system.
- Lead Partner applies for a **username** to each Application separately. PROMAS will automatically create specific user name and password for the applicant.
- Username can be requested from the system only when the Call for proposal's status is **open**.
- After registration in the PROMAS, the Lead Partner can give the **user rights** (write/read or only read) to its project's partners.
- You can **save** the Application at any time and **return** to continue filling in it later.
- The Managing Authority **does not have a right** to access the Application before it **has been submitted**.
- Before the submitting the Application, check that **every field is filled in**. The system will not automatically check and warn for the empty fields.

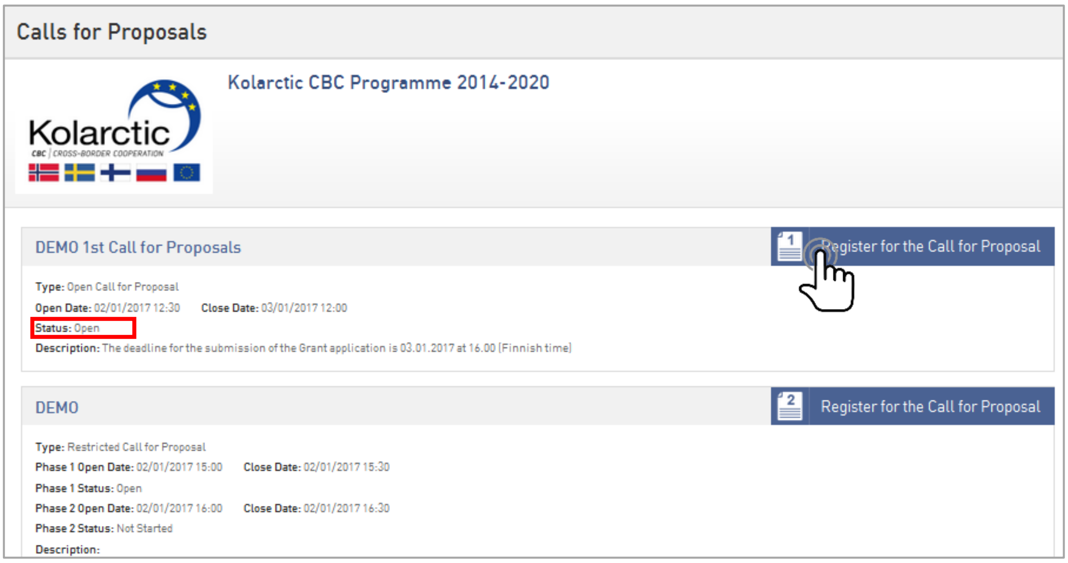
1. REGISTRATION FOR CALL FOR PROPOSALS

Step 1. Go to PROMAS website: https://promascbc.fi/

Step 2. Click on the **Kolarctic CBC 2014.2020 Programme** box



Step 3. The **Calls for Proposals** page will appear. Click the button **Register for the Call for Proposal** on the Call for Proposal you want to apply.

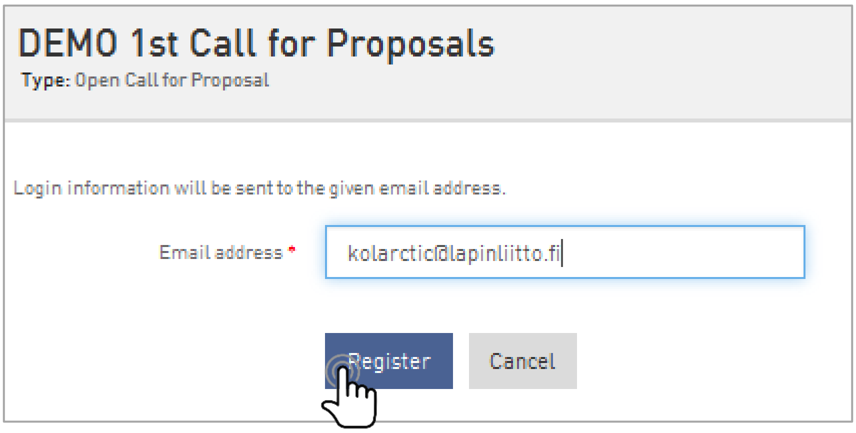


The Call for proposals have statuses: **Not started**, **Open**, **Closed**.

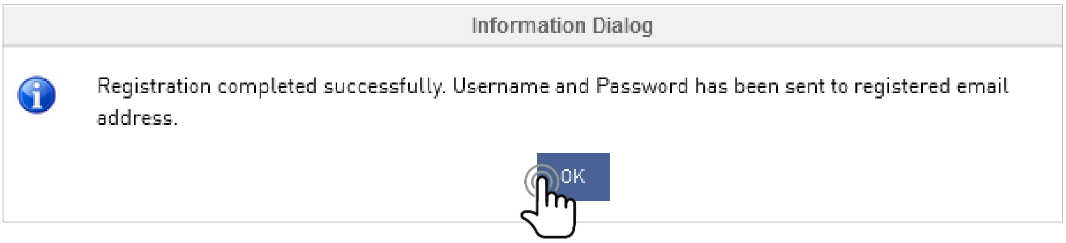
When Call for proposals' status is **Open** the button **Register for the Call for Proposal** will appear at the top-right corner of the box.

The sheet icon in the registration link indicates if the call for proposal is **Open** (1) or **Restricted** (2).

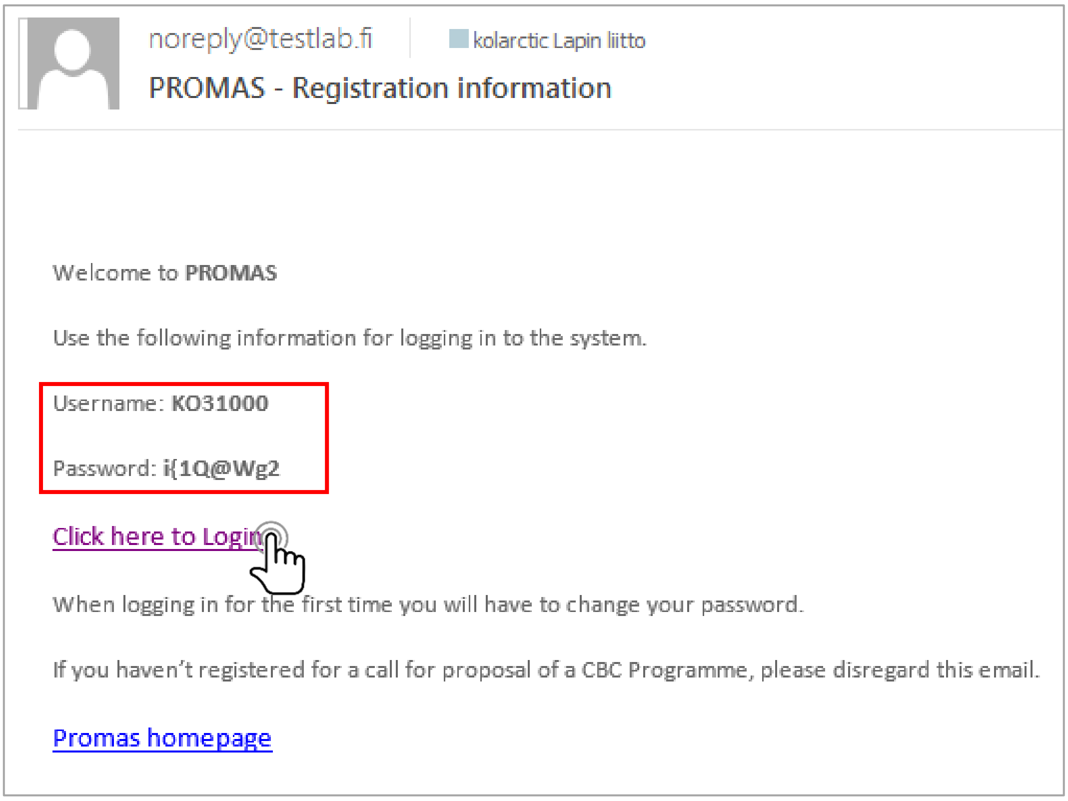
Step 4. The **Register** form will appear. Enter your email address and click button **Register.**



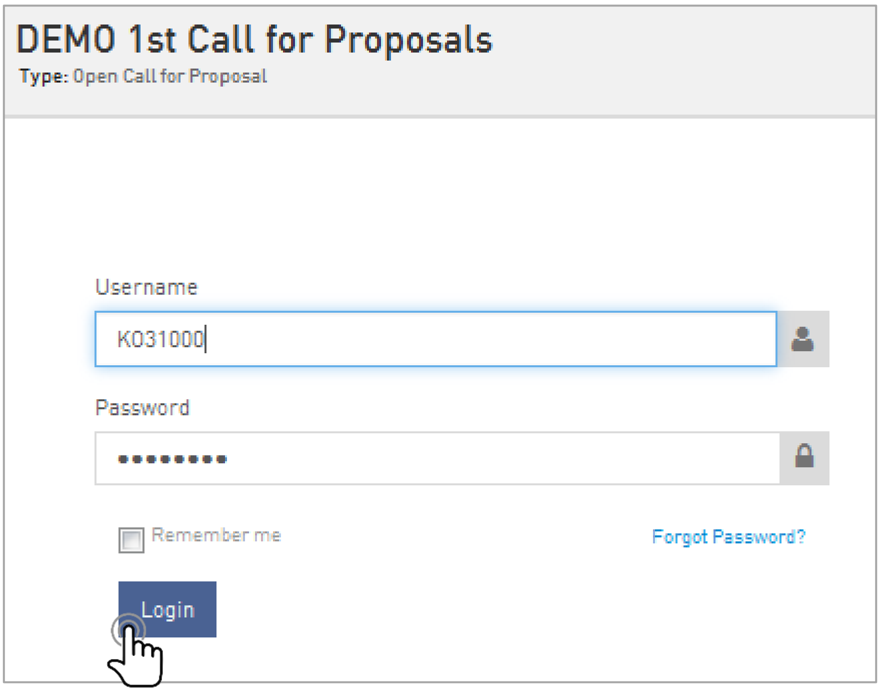
Step 5. Info box will appear which confirms the registration.



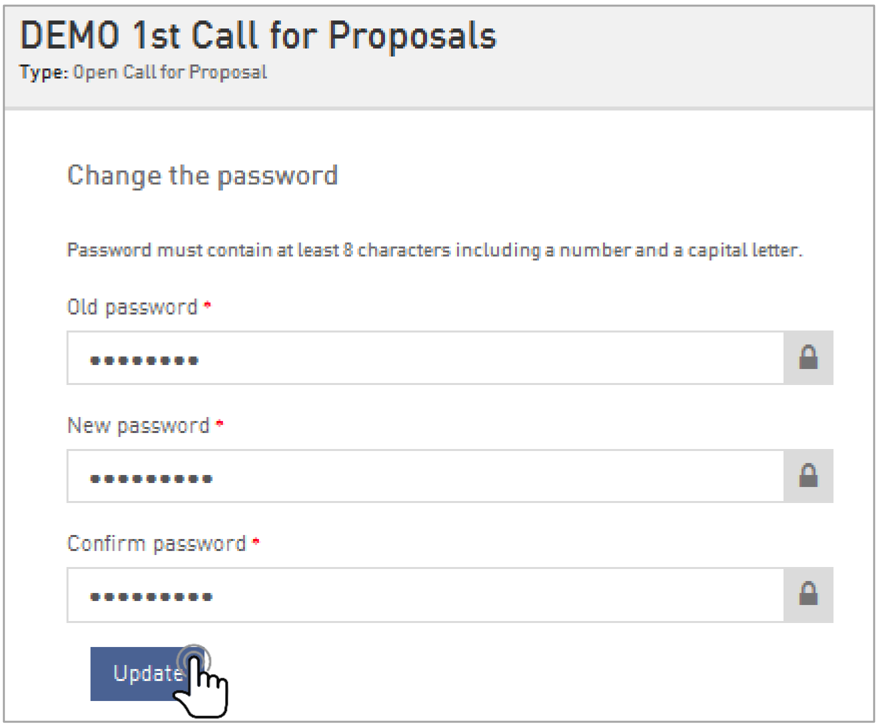
Step 6. Login information (username and password) is now sent to your email. Go to your email, open the email from **noreply@testlab.fi** and click the link **Click here to Login.**



Step 7. **Login page** will appear. Write your username and password, which you received by email. Click **Login.**



Step 8. **Change the password** page will appear. Here you have to change the automatically generated password which you received by email. Follow the directions by entering the required information. After click **Update**.

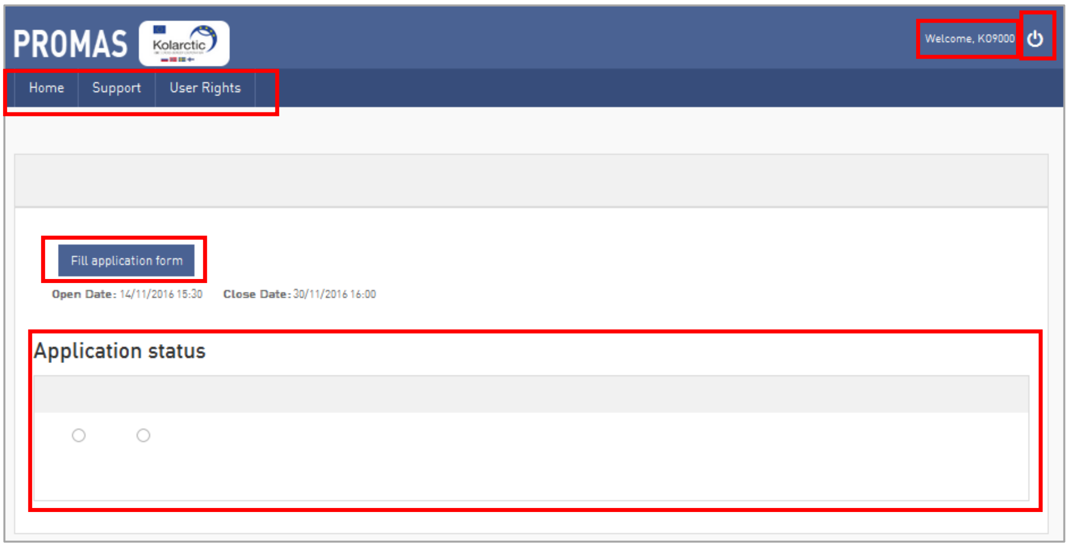


Please notice that your new password **cannot be the same as old one** and it needs to:

- Include both **lower (a-z) and upper (A-Z) case characters**
- Include at least **one number (0-9)**
- Be at least **8 characters** long

Step 9. The **Home page** will appear. Now you successfully registered your Application and logged in PROMAS.

To register another Application please repeat all the steps described above.
For every Application you need to apply specific username.



On the **Home page** you will see:

- **Username of Application** at the top-right corner of the window
- Top navigation:

  Home: leads to the Home page

  Support: contact information

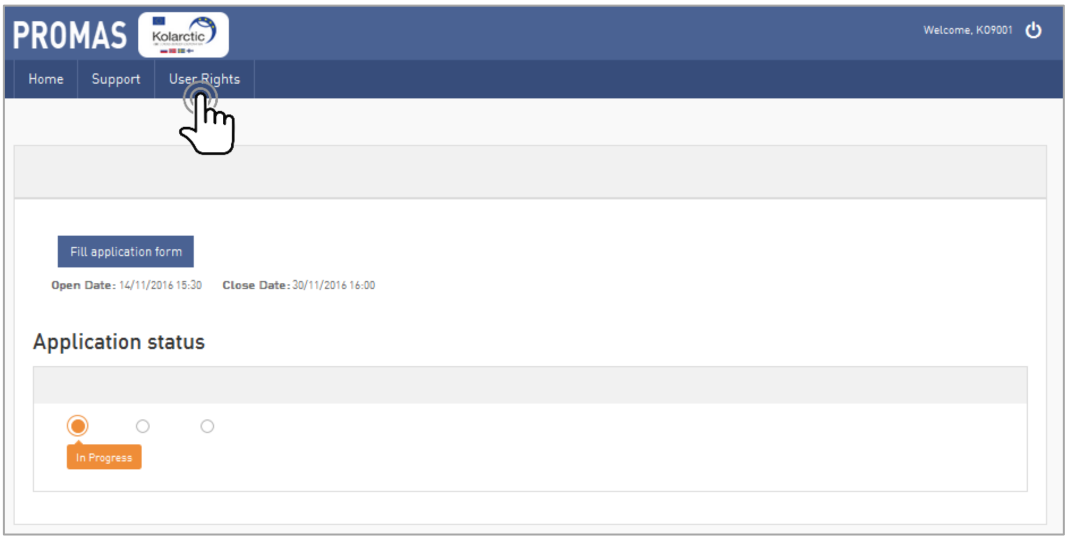
  User Rights: here you can give the user rights (only read or read/write) to the Partners of the Application.
- **Fill application form** button: leads to Application page.
- **Open Date and Close Date** of the Call for Proposals
- **Application status**: it will change while the application process goes on. See the table with the description of the Application statuses on the p. 26

To **log out** from the system click on ⏻ at the top-right corner of the window.

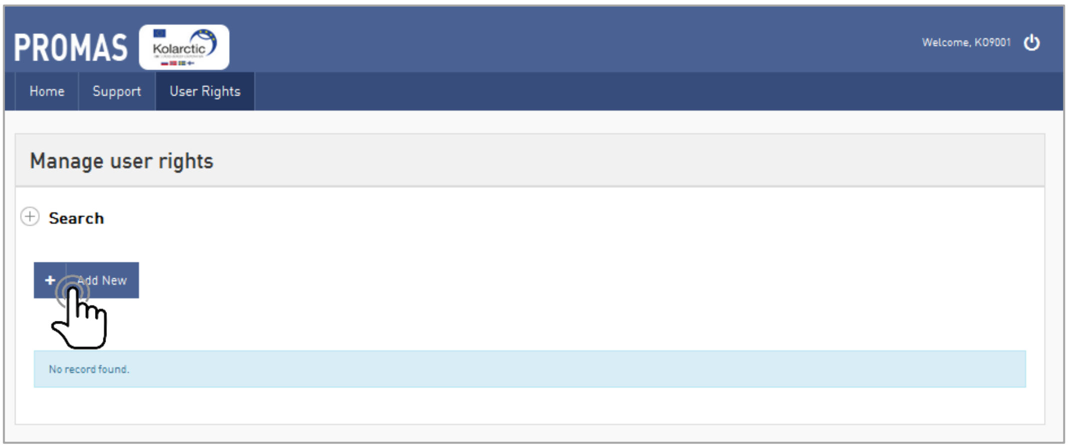
2. MANAGE USER RIGHTS

After registration in the PROMAS, the Lead Partner can give the user rights (write/read or only read) to its project's partners.

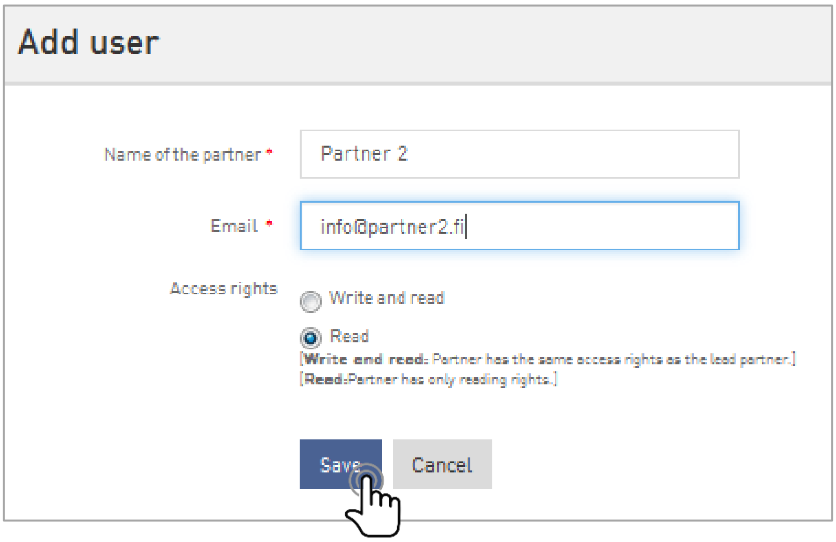
Step 1. Click **User Rights** at the Top navigation



Step 2. **Manage user rights page** will appear. Click on **Add new** to add new Partner



Step 3. **Add user** form will appear. Follow the directions by entering the required information. Then click **Save**.



Access rights

Write and read: partner has the same access rights as the Lead partner. Partner can make any changes to the Application.

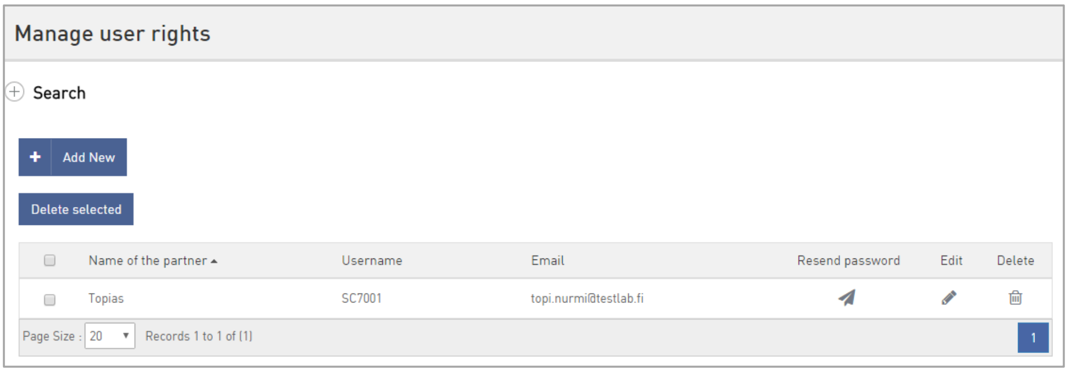
Read: partner has only reading right. Partner cannot make any changes to the Application.

Step 4. Info box will appear which confirms that the User is add successfully.

Step 5. Login information (username and password) is now sent to provided email.

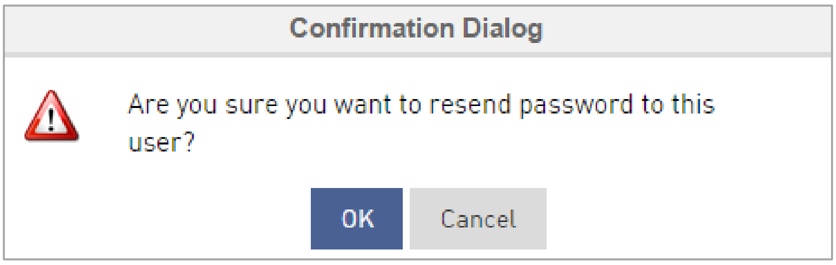
Repeat **steps 1-5** to give the User rights to other partners.

Step 6. User returns back to **Manage user rights** page.

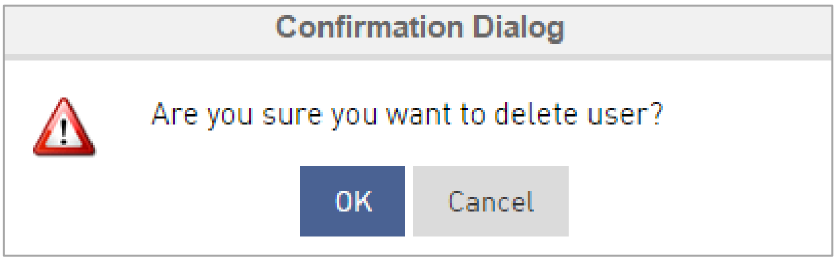


Following information and functionalities are available in the **Manage user rights** page:

- Add New partner
- Delete selected users
- Name of the partner
- Username
- Email
- Resend password - in case partner forgets the password, applicant can resend the password via this functionality. System asks to confirm the resending. The partner will receive the new password to the registered email. The password must be changed when login first time.



- Edit partner name or access rights (Write and read, Read)
- Delete partner. System ask to confirm user deletion.

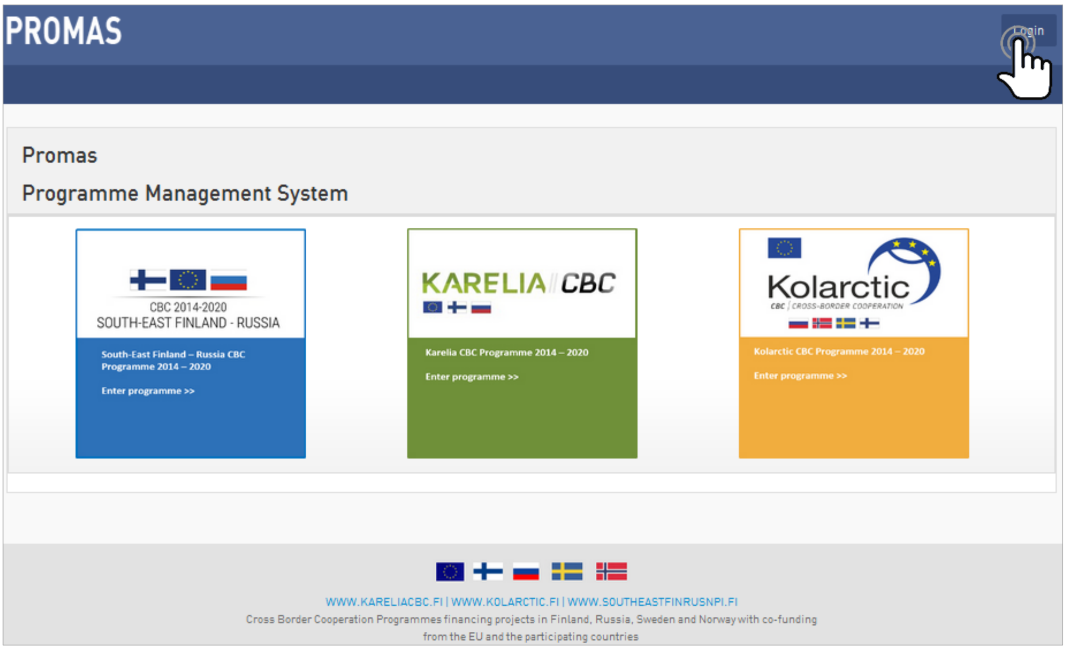


3. FILLING IN AND SUBMITTING THE APPLICATION FORM

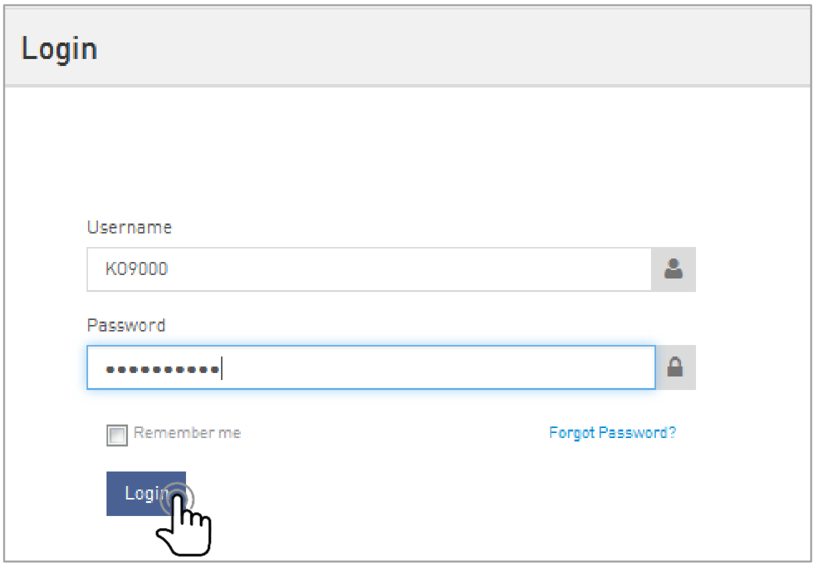
If you already **Logged in** PROMAS and have **Home page** opened, please go to the **Step 4**.

Step 1. Go to PROMAS website: https://promascbc.fi/

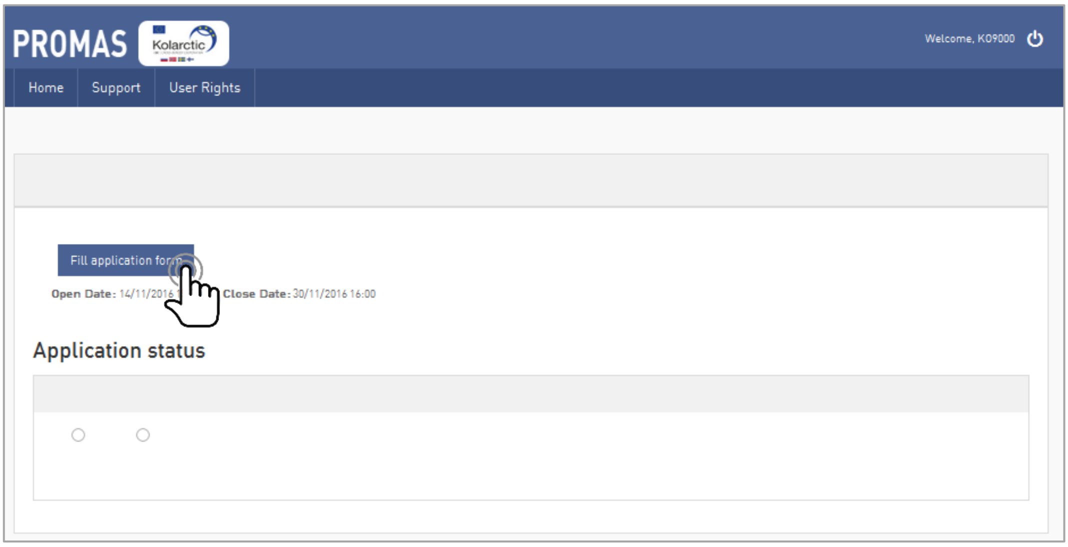
Step 2. Click on the **Login** button at the top-right corner of the window.



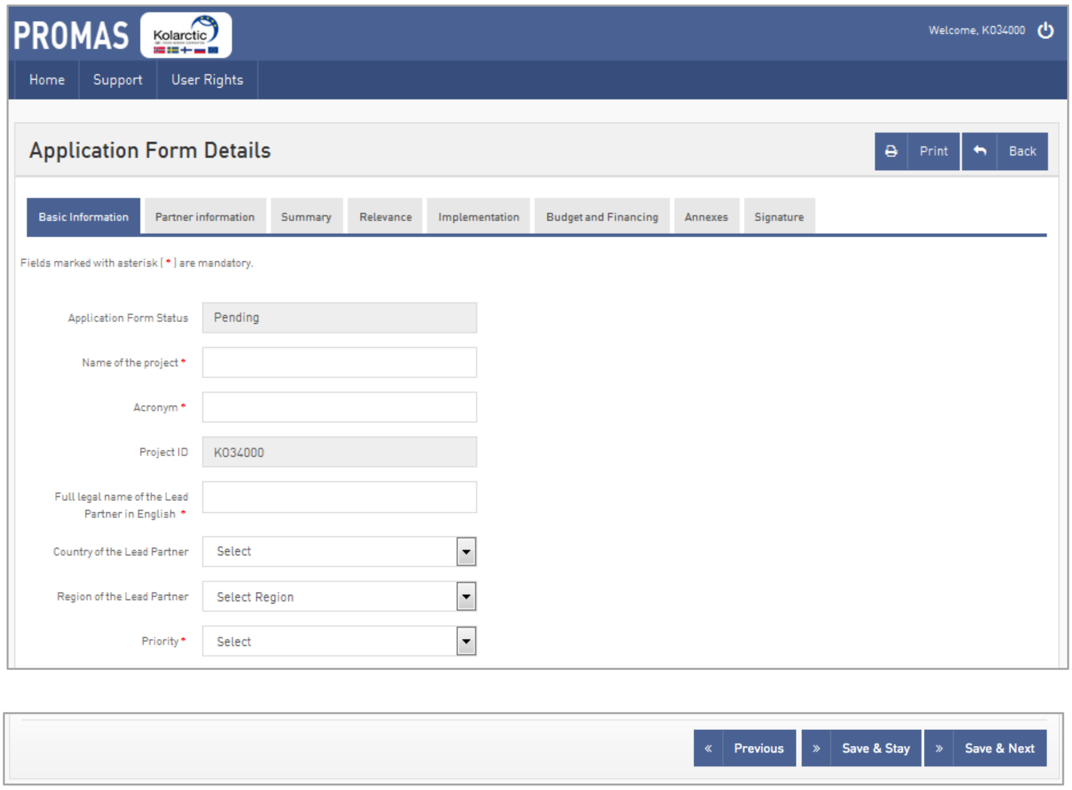
Step 3. **Login page** will appear. Write your username and password. Click **Login.**



Step 4. The **Home page** will appear. Features of the Home page described on the p. 7. Click **Fill application form** to start to fill in the application.



Step 5. The **Application Form page** will appear.



The **Application Form** page has following features:

NAVIGATION TABS:

Basic Information: Basic information, Partners, Requested financing

Partner Information: Identity, Contact person, Motivation, Operational capacity, Financial capacity, Other public financing

Summary

Relevance: Objective, Thematic indicators, Project specific indicators, Work plan, Sustainability

Implementation

Budget and Financing

Annexes

Signature

BUTTONS:

Print: print the application

Back: close the application window and go to Home page

Previous: save just typed data and return to previous tab

Save & Stay: save just typed data and stay on the page

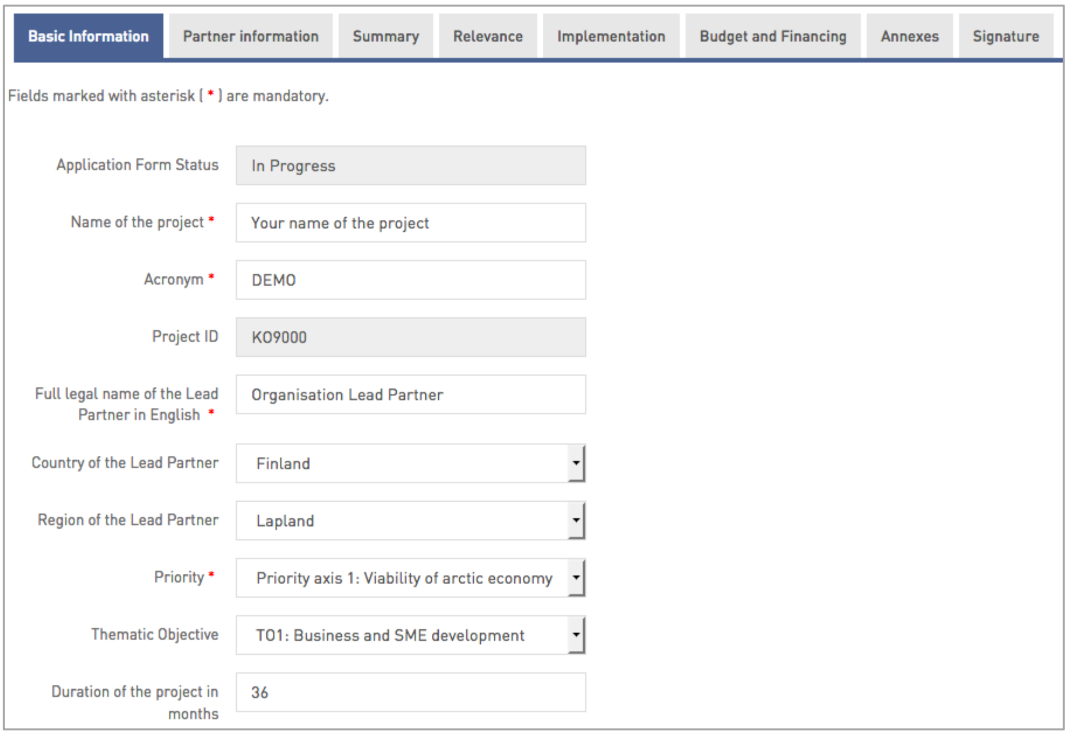
Save & Next: save just typed data and go to the next tab

Submit: save the application and submit it to the Managing Authority. The application is locked and cannot be edited anymore.

You can move between the tabs by clicking on the **name of the tab** or by clicking buttons **Previous** and **Save&Next.**

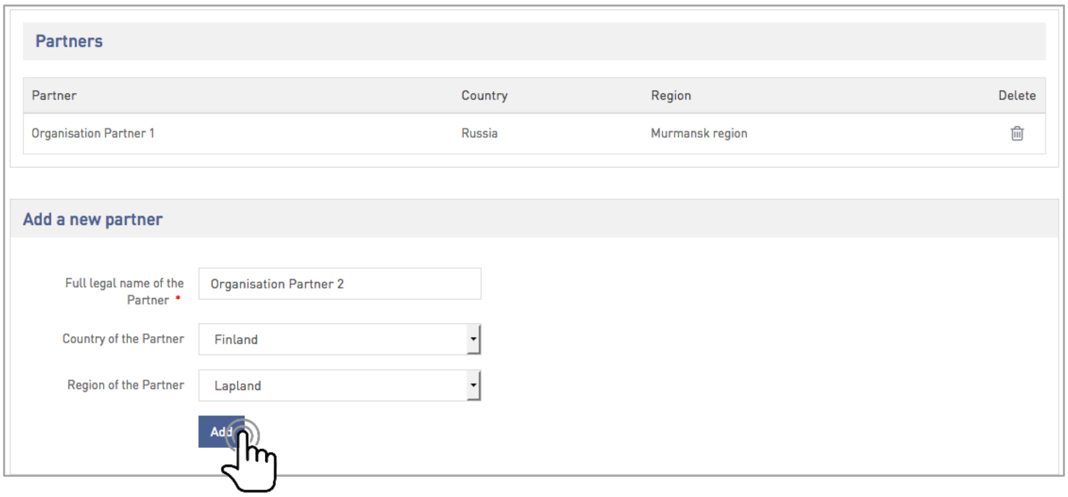
- You can return at any time to the previous step to correct or add more data.
- You can save the Application at any time and return to fill in it later.
- The Managing Authority does not have a right to access the Application before it has been submitted.
- You can print the Application at any time by clicking **Print.**

Step 6. Tab **Basic Information**: Follow the directions by entering the required information, such as Name of the project, Acronym etc.



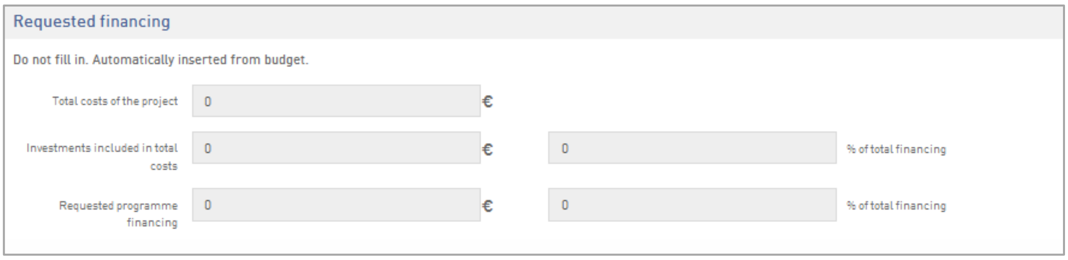
Acronym: Give and acronym of **3-8 digits**.

Step 7. Tab **Basic Information,** section **Partners:** Add the partners to the **Partners** table by entering the required information to **Add a new partner** section. Then click **Add.** Now the partner listed in the **Partners** table.

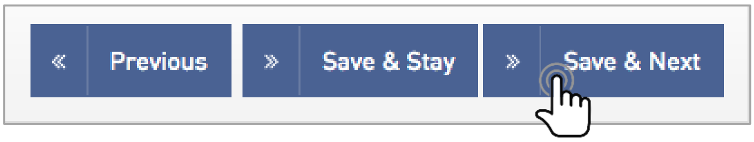


To add the next partner, please repeat the step again.

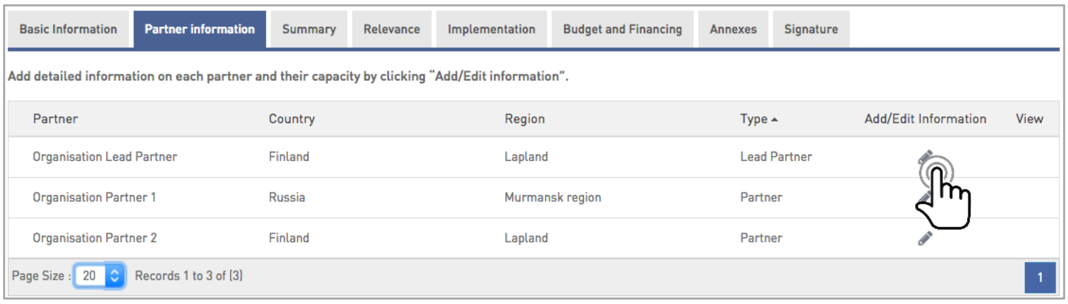
Step 8. Tab **Basic Information,** section **Requested financing:** Do not fill in. Data will automatically inserted from **Budget and Financing** tab.



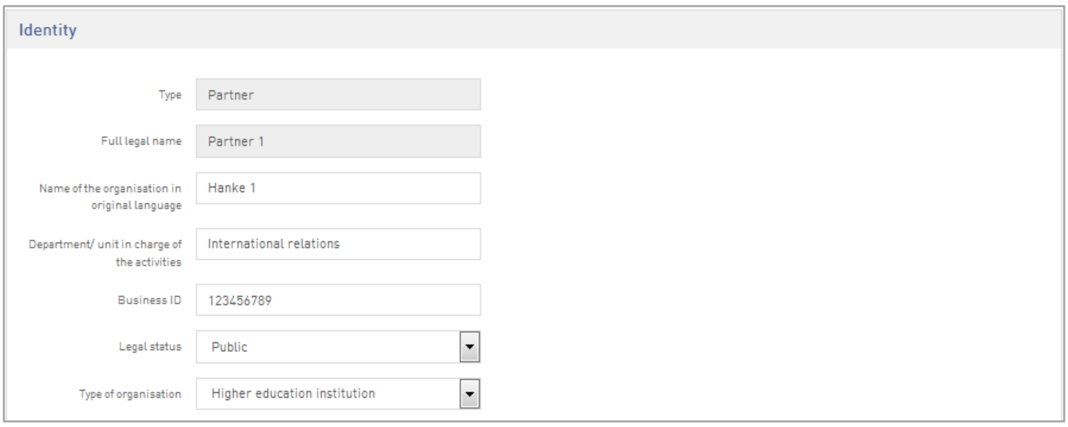
Step 9. Click **Save & Next** to move to the next tab **Partner Information**.



Step 10. Tab **Partner Information:** Add detailed information on each partner and their capacity by clicking on **Add/Edit Information** icon.



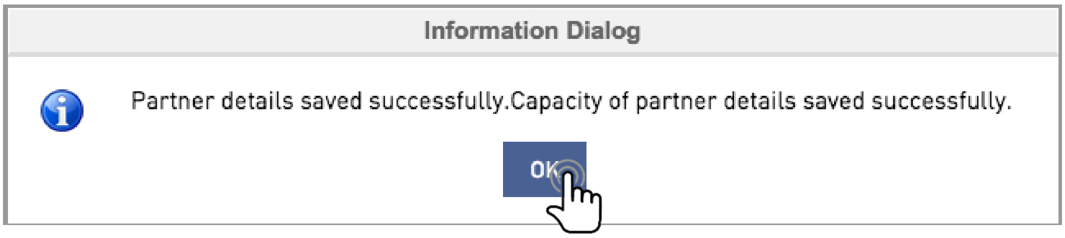
Step 11. Bellow the **Partners table** the required fields will appear. Follow the directions by entering the required information in the sections **Identity**, **Contact Person**, **Motivation**, **Operational Capacity**, **Financial Capacity**, **Other public financing**.



Name of the organisation in original language: Write the name of the organization using **Latin** alphabet.

Step 12. Click **Save & Stay** to stay on the page and fill in details for the next partner. When the details for all partners are filled in click **Save & Next** to move to the next tab.

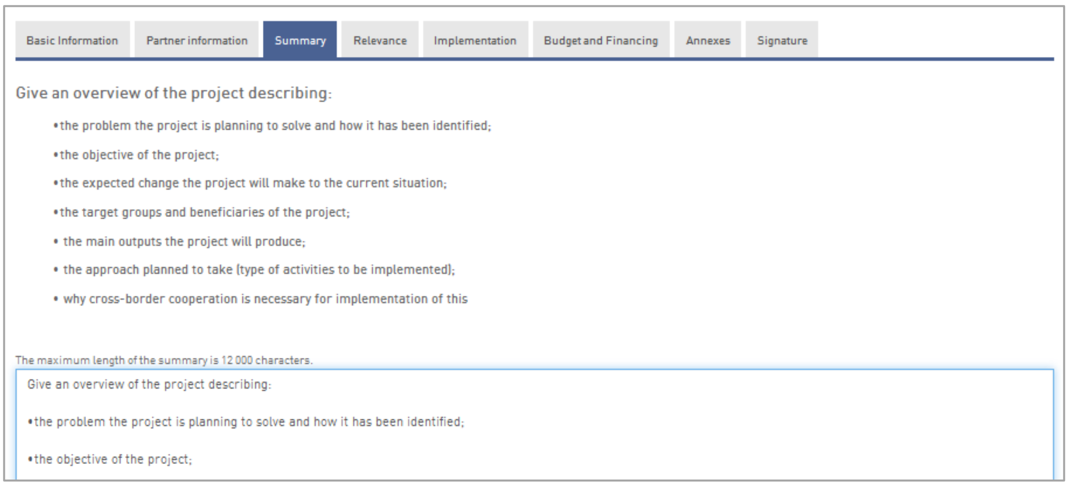
Step 13. Info box will appear which confirms that partner's details are saved successfully. Click **OK.**



Repeat **steps 10-13** to add other partners' details.

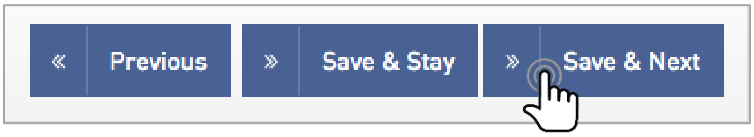
Step 14. Click **Save & Next** to move to the next tab **Summary**.

Step 15. Tab **Summary:** Follow the directions by entering the required information.

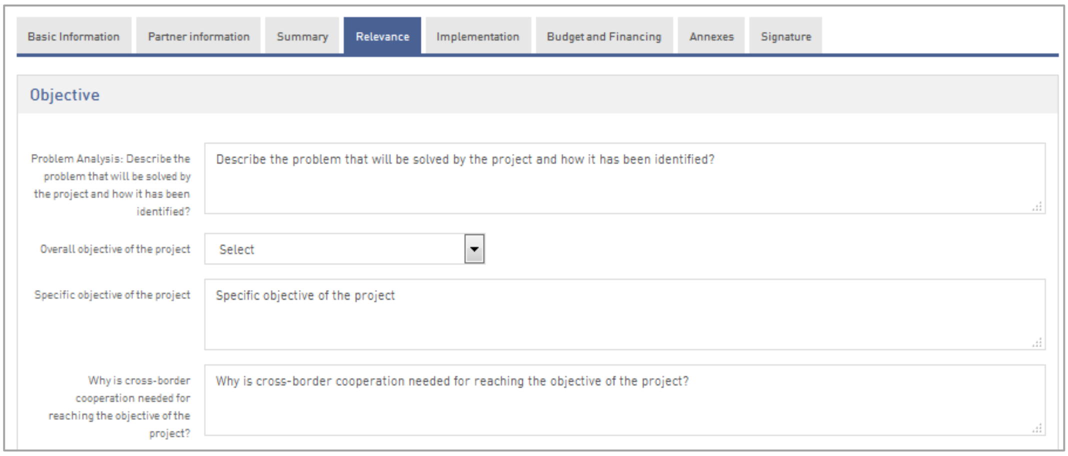


The maximum length of the summary is **12 000 characters**.

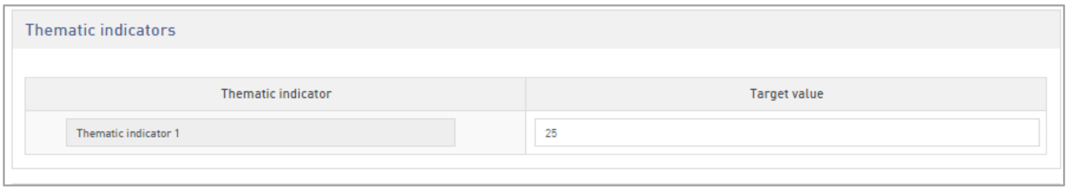
Step 16. Click **Save & Next** to move to the next tab **Relevance**.



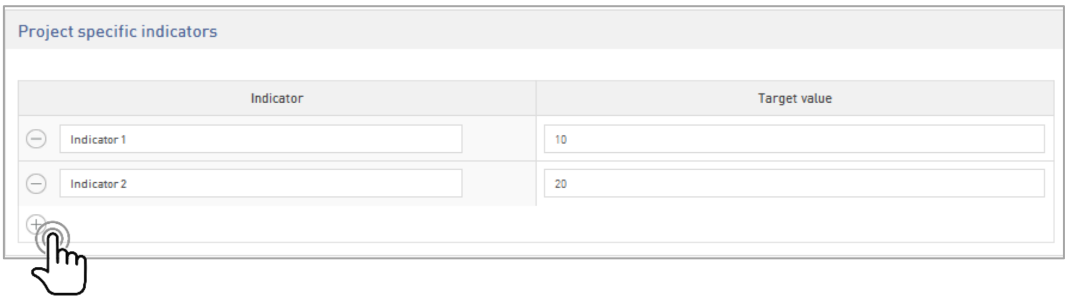
Step 17. Tab **Relevance,** section **Objective:** Follow the directions by entering the required information.



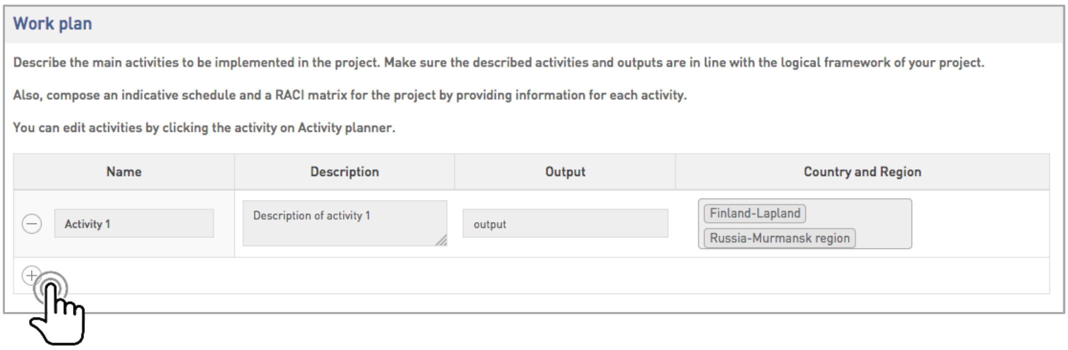
Step 18. Tab **Relevance**, section **Thematic indicators**: provide target value to Thematic indicators. Please note that Thematic indicators are set by the Programme.



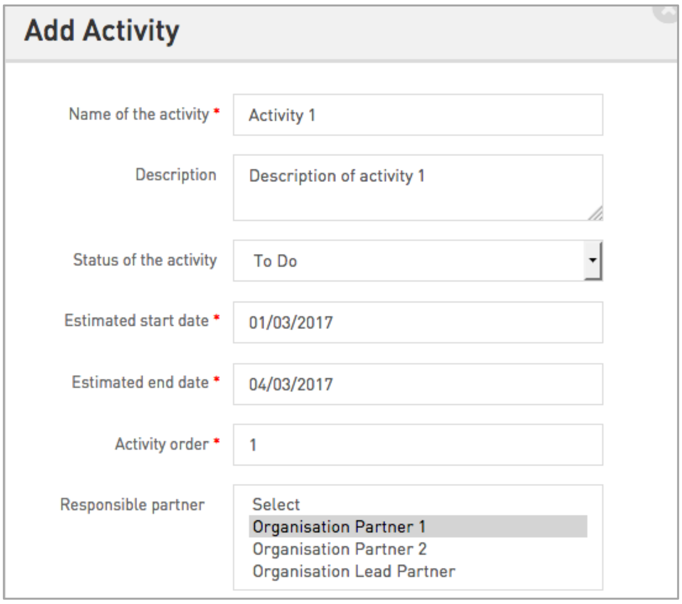
Step 19. Tab **Relevance**, section **Project specific indicators**: add Project specific indicators by clicking **"+" symbol** and inputting the indicator. Project indicator can be deleted by clicking **"–" symbol**.



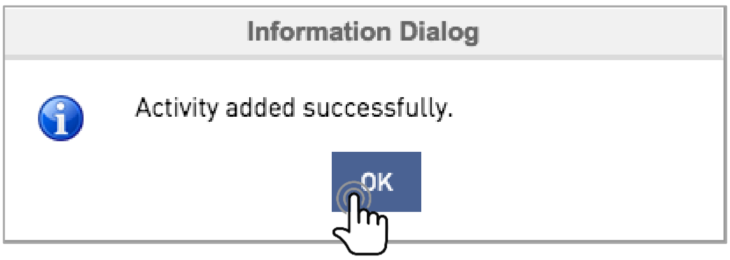
Step 20. Tab **Relevance**, section **Work plan**: to add the activity to the **Work plan**, click **"+" symbol**. Activity can be deleted by clicking **"–" symbol**. You can edit activities by clicking the activity name on **Activity planner** chart.



Step 21. The **Add Activity** pop-up window will appear. Follow the directions by entering the required information.



Step 22. Click **Save** to add the activity to Work plan. Info box will appear which confirm that the activity is added to Work plan.



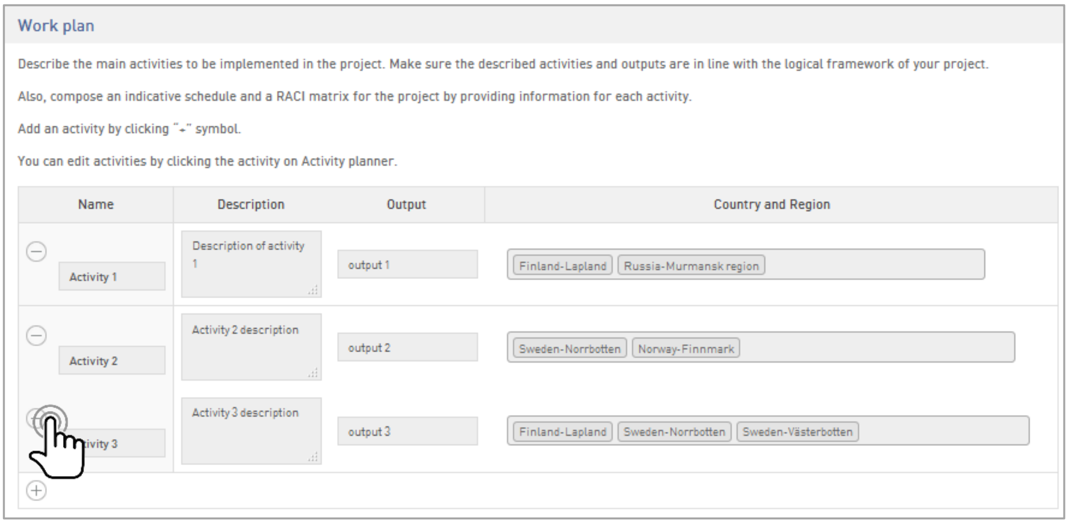
Repeat the **Steps 20-22** to add more activities to Work plan.

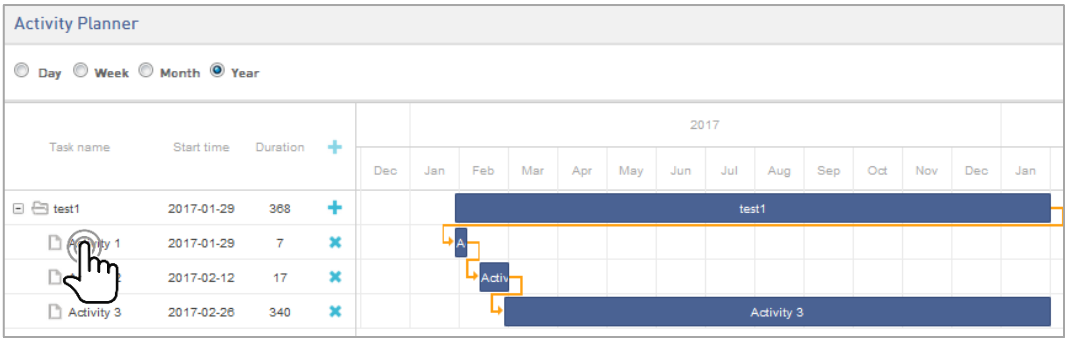
WORK PLAN, ACTIVITY PLANNER AND RACI MATRIX

The activities that you have defined in the **Work plan** also appear **automatically** in the **Activity Planner** chart. It also provides you a visual schedule with the activities on a timeline.

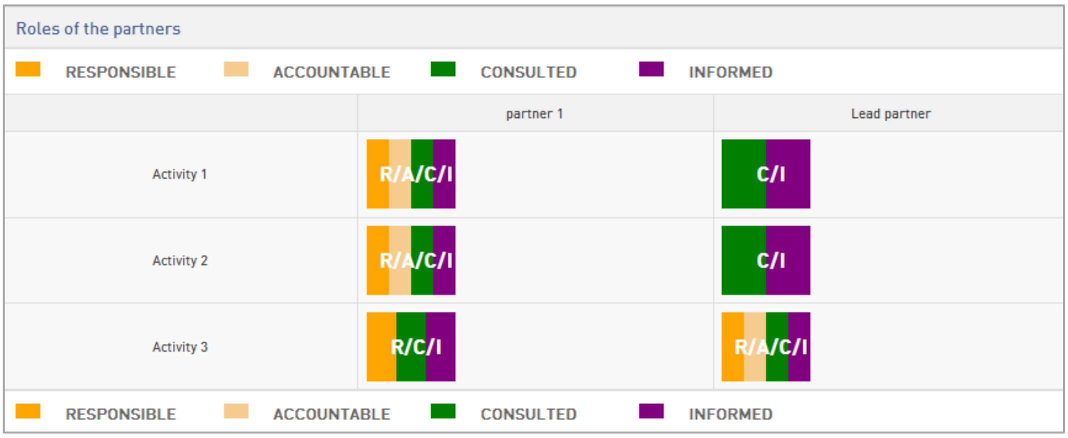
In the **Activity Planner** chart, you can view the project's activities on daily, weekly, monthly or yearly level.

You can **Edit/Update/Delete** the activity by double-clicking on the name of the activity in the **Activity Planner** chart. Activity can be also deleted by clicking **"-"** icon on the **Work plan**.

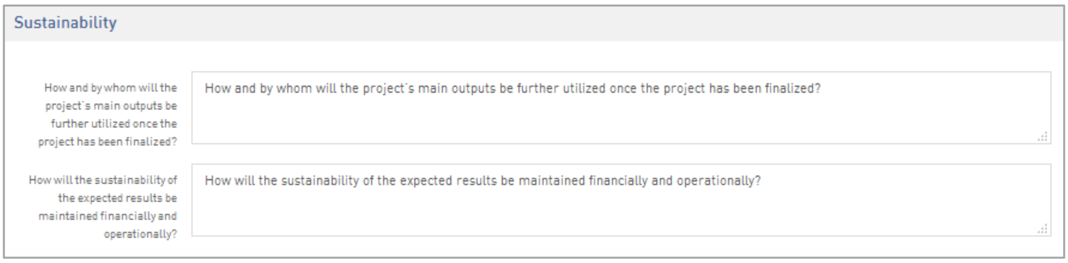




Activity planner is also updating **RACI (Responsibility matrix)** to the application, which shows the activity level of the following responsibilities of the partners: Responsible partner, Accountable partner, Consulted partner or Informed partner.

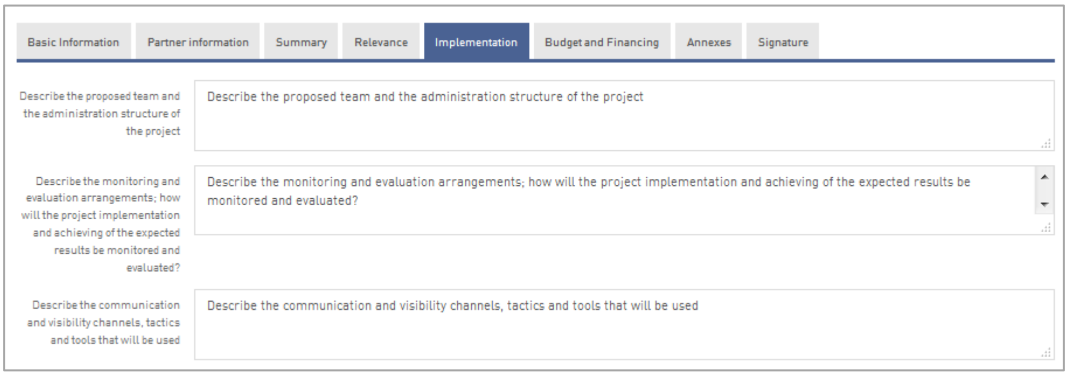


Step 23. Tab **Relevance**, section **Sustainability:** Follow the directions by entering the required information.



Step 24. Click **Save & Next** to move to next tab **Implementation**.

Step 25. Tab **Implementation:** Follow the directions by entering the required information.



Step 26. Click **Save & Next** to move to next tab **Budget&Financing**.

Step 27. Tab **Budget&Financing:** Fill in the project budget by clicking **Add/Edit.**

Record highlighted with **red** font is not filled yet. Record highlighted with **green** font has been filled up.

Step 28. **Add Project Budget** window will appear. Follow the directions by entering the required information in sections **Budget Details** and **Financial Plan**.

Add Project Budget

Title Budget

Programme Name Kolarctic CBC Programme 2014-2020

Budget Details

Type of Cost	Year 1	Year 2	Year 3	Total
1. Personnel	50 000	50 000	50 000	150 000
2. Travel	5 000	5 000	5 000	15 000
3. Equipment and purchases	5 000	5 000	5 000	15 000
4. Local office	1 000	1 000	1 000	3 000
5. External office, sub-contracting	10 000	10 000	10 000	30 000
6. Infrastructure investments	10 000	10 000	10 000	30 000
8. Indirect costs (max 7%)	5 670	5 670	5 670	17 010
Total	86 670	86 670	86 670	260 010
Project revenue	0	0	5 010	5 010
Net eligible costs	86 670	86 670	81 660	255 000

Financial Plan

Requested programme financing	165 000	€ 64.71 % of total financing
Co-financing from the project partners	30 000	€
Co-financing from other sources		€
Total Co-financing	90 000	€ 35.29 % of total costs
Total financing	255 000	€

Investments included in total costs

Amount of investment	30 000	€
Share from total cost	11.76 %	

National co-financing
Inserted values will be added to "Total co-financing" field.

Norwegian co-financing	50 000	€
Swedish co-financing	10 000	€

Save Cancel Reset

Data should be collected from the **Annex A of the Grant Application**. Please, check that the values in Annex A and PROMAS are equal.

NOTE: In order to save the Project Budget the field **Net eligible costs** and field **Total financing** have to be equal.

See the instructions **How to fill in data from Annex A to PROMAS** on the **p. 22.**

HOW TO FILL IN DATA FROM ANNEX A TO PROMAS

BUDGET DETAILS

Type of Costs: indicate the values from the ANNEX A sheet "**1.Budget TOTAL**" on the project level by each budget line for each year.

Total: filled in automatically.
 = *sum of budget lines 1+2+3+4+5+6+8*

Project revenue: insert the value from the ANNEX A sheet "**1.Budget TOTAL**", "Budget line 10. Revenues"

Net eligible costs: filled in automatically
 = *Total - Project revenue*

FINANCIAL PLAN

Requested programme financing: indicate the values from ANNEX A sheet **"2.Financing plan"** rows:
 + EU financing
 + Finnish national state co-financing
 + Russian national state co-financing
 + Norwegian Kolarctic financing

Co-financing from the project partners: indicate values from ANNEX A sheet **"2.Financing plan"** rows:
 + Own contribution (public organisations)
 + Own contribution (private organisations)

Co-financing from other sources: indicate values from ANNEX A sheet **"2.Financing plan"** rows:
 + Other Finnish public co-financing
 + Finnish private co- financing
 + Other Russian public co-financing
 + Russian private co-financing
 + Swedish public co-financing
 + Swedish private co-financing
 + Norwegian public co-financing
 + Norwegian private co-financing

Total Co-financing: filled in automatically
 = *Co-financing from the project partners + Co-financing from other sources*

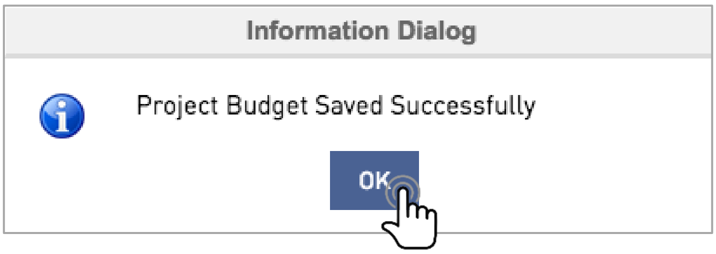
Total financing: filled in automatically
 = *Requested programme financing + Total Co-financing*

INVESTMENTS INCLUDED IN TOTAL COSTS

Amount of investment: indicate the value from ANNEX A sheet **"Budget TOTAL"** row "Budget line 6. Infrastructure investments".

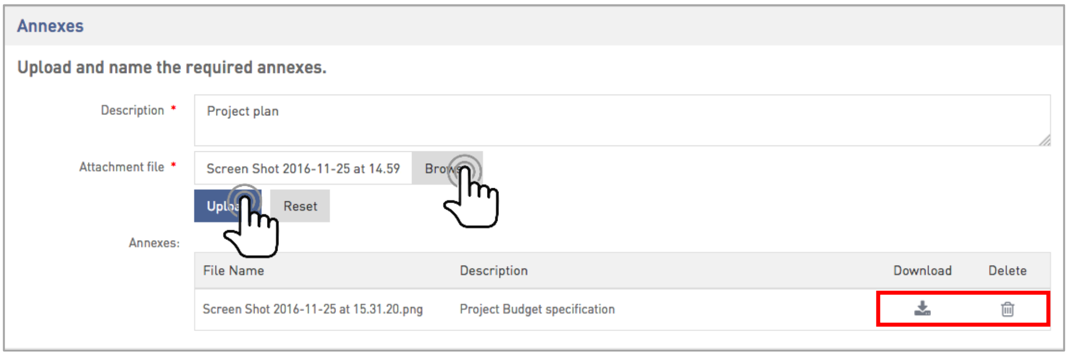
Share from total cost: filled in automatically
 = *Amount of investment/ Net eligible costs * 100%*

Step 29. Click **Save** to add the Project Budget. Info box will appear which confirms that the Project Budget is saved successfully.



Step 30. Click **Save & Next** to move to next tab **Annexes**.

Step 31. Tab **Annexes:** In the **Description** field write the name of the document. By clicking on the **Browse** button, search the file from your computer. After file is chosen, click **Upload**. Now the file is uploaded to **Annexes** table.



To **add other file**, please repeat the **Step 31**.

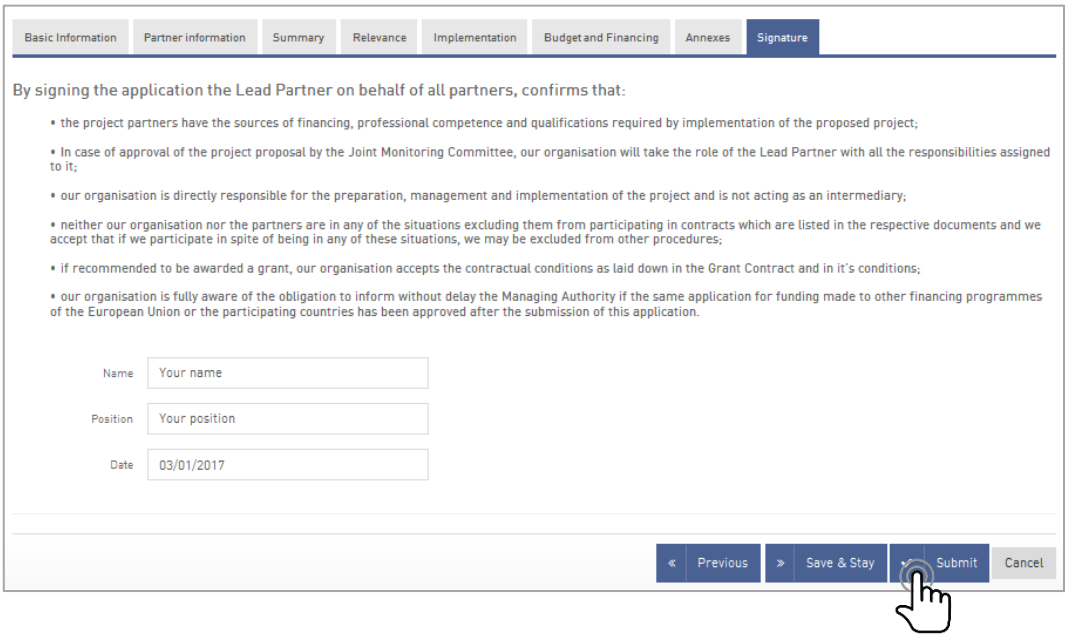
You can **view** the attachment by clicking on download icon ( ) and **delete** by clicking on bin icon ( )

The following annexes are the part of the Grant application:
Annex A: Budget specification
Annex B: Logical framework
Annex C: The registration certificate of Partners (Lead Partner and Partners)
Annex D: National state co-financing or Norwegian Kolarctic financing form
Annex E: Partnership Statement
Annex F: Result indicators
Annex G: Decision (copy) of the state aid granted within de minimis conditions (if applicable)
Annex H: Building permit or any other permits needed for implementation of the project (if applicable)
Annex I: Specification of Infrastructure Investment (if applicable)

Annexes can be found on the Programme web-page http://www.kolarctic.info/

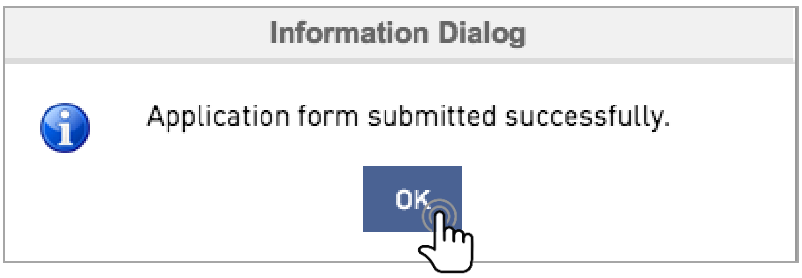
Step 32. Click **Save & Next** to move to next tab **Signature**.

Step 33. Tab **Signature:** Follow the directions by entering the required information, such as name, position and date. Click **"Save&Stay"** to save the application as a draft. Click **Submit** to lock the application and sent it to Managing Authority.

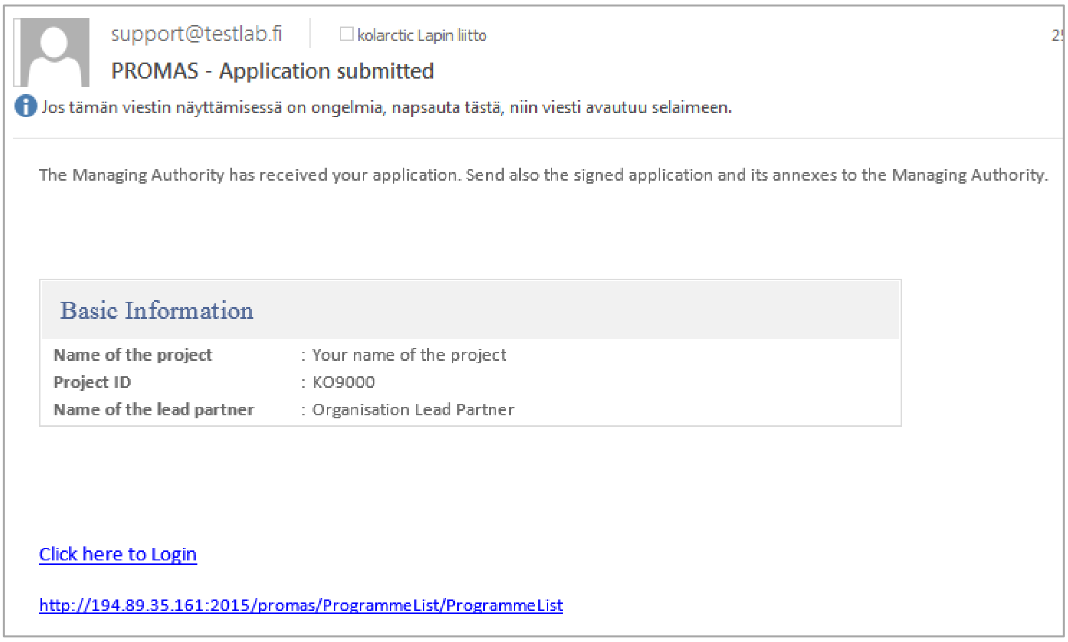


Step 34. If Submit is clicked, the info box will appear to confirm the submitting. Click **Ok**.

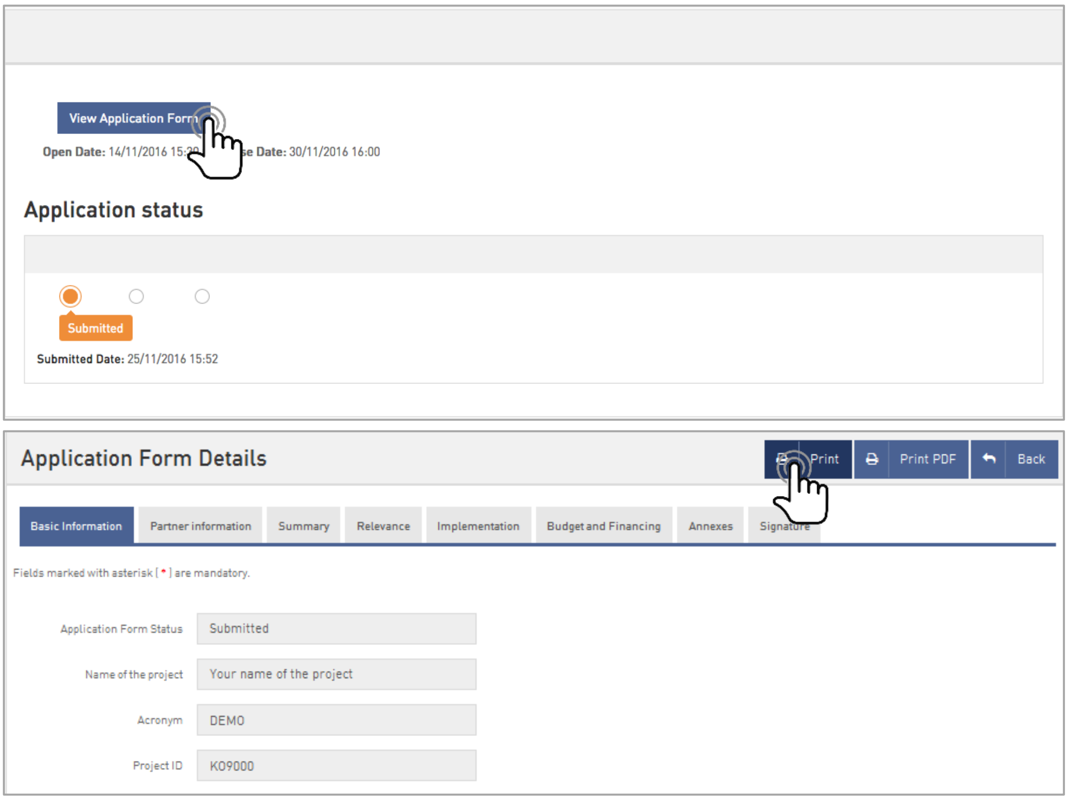
Step 35. Info box will appear to confirm the submitting of application. Click **Ok**.



Step 36. You will receive an email confirming that the application is submitted.



Step 37. After the Application is submitted you will be redirected to the **Home page**. The Application status will change from **In progress** to **Submitted**.
To download and print the Application click **View Application Form. Application Form** window will open. Then click **Print** to download and print the application.
Please sign it and sent the original document by post to Managing Authority.



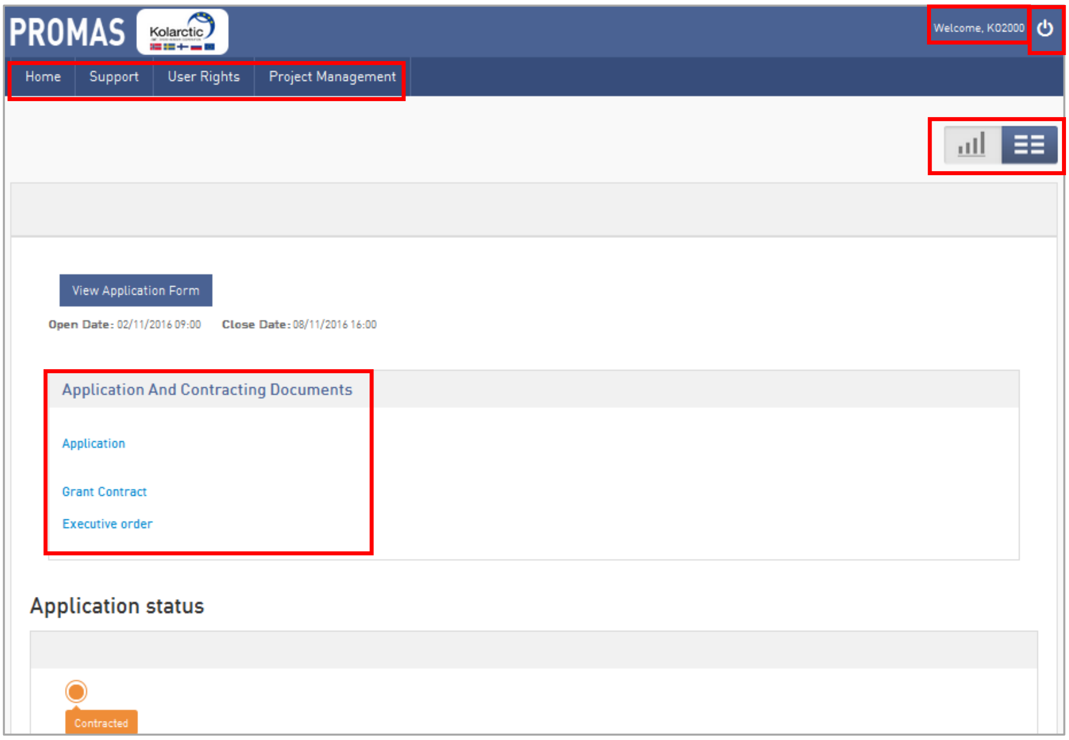
4. APPLICATION STATUSES

APPLICATION STATUS	DESCRIPTION
In progress	The Application is under development. The Applicant can fill in, edit and save the Application in the system anytime. The Managing Authority does not have a right to access the Application before it has been submitted.
Submitted	The Application is locked and submitted to the Managing Authority. The Managing Authority opens the submitted application for administrative check *The Application can be viewed as an attachment in PROMAS.*
Reopened	During the administrative check, in the case if, the Managing Authority requests clarification to the application, the Application will be Reopened. **The applicant will receive an email for Request for clarification.** **APPLICANT SHOULD DO:** Log in to PROMAS, click "**Fill application form**" button to provide requested clarifications. Applicant must do the requested updates in the Application and **submit** it for review again. It will get status "Submitted" again.
Administrative process rejected	Administrative check has been conducted to the Application and the Application is rejected.
Administrative process passed	Administrative check has been conducted to the Application. The Application passed it and is forwarded for the quality assessment
Expert evaluated	Quality assessment of the Application has been done by the Regional Assessment Groups or an external expert.
Committee: rejected	Joint Monitoring Committee has made the decision to reject the Application. The Executive order will be made.
Committee: reserve listed	Joint Monitoring Committee made the decision to put the Application to reserve list.
Committee: approved	Joint Monitoring Committee made the decision to approve the Application. The Executive order will be made.
Executive order made: Rejected	The Executive order made for rejected Application by the Managing Authority. *The Executive order can be viewed as an attachment in PROMAS.*
Executive order made	The Executive order has been made for approved Application by the Managing Authority. The Grant Contract negotiations can start now. *The Executive order can be viewed as an attachment in PROMAS.*
Reopened	The Managing Authority might request clarification also in negotiation phase. The Application is reopened for providing the requested information. **Applicant will receive an email for Request for clarification.** **APPLICANT SHOULD DO:** Log in to PROMAS, press "**Fill application form"** button to provide requested clarifications. Applicant must do the requested updates in the Application and **submit** it for review again. Status changes back to "Executive order made".
Cancelled	Negotiation phase is completed and the Application iscancelled.
Negotiation concluded	Negotiation phase is completed. Now the Managing Authority will prepare the Grant Contract and sends the printed version of it to the applicant for signing.
Contracted	After the Managing Authority has received signed Grant Contract, the Grant Contract is uploaded to PROMAS and application will get status "Contracted". *The Grant Contract can be viewed as an attachment in PROMAS.*

5. GRANT CONTRACT – CONTRACTED APPLICATION

5.1. HOME PAGE VIEW

When the Managing Authority has made a Grant Contract to applicant, it is visible in PROMAS **Home page**. In the PROMAS **Home page** you can also see other related documentation concerning Application and Grant Contract. When application gets status "Contracted", following information is available in the PROMAS **Home page**.



On the **Home page** you will see:

- **Username of Application/Project ID** at the top-right corner of the window
- Top navigation:

  Home: leads to the Home page

  Support: contact information

  User Rights: here you can give the user rights (only read or read/write) to the Partners of the Application.

  Project Management: here you can manage project related activities such as payment request and reporting. These functionalities will be described more in detail in the PROMAS Manual for Ongoing Projects.

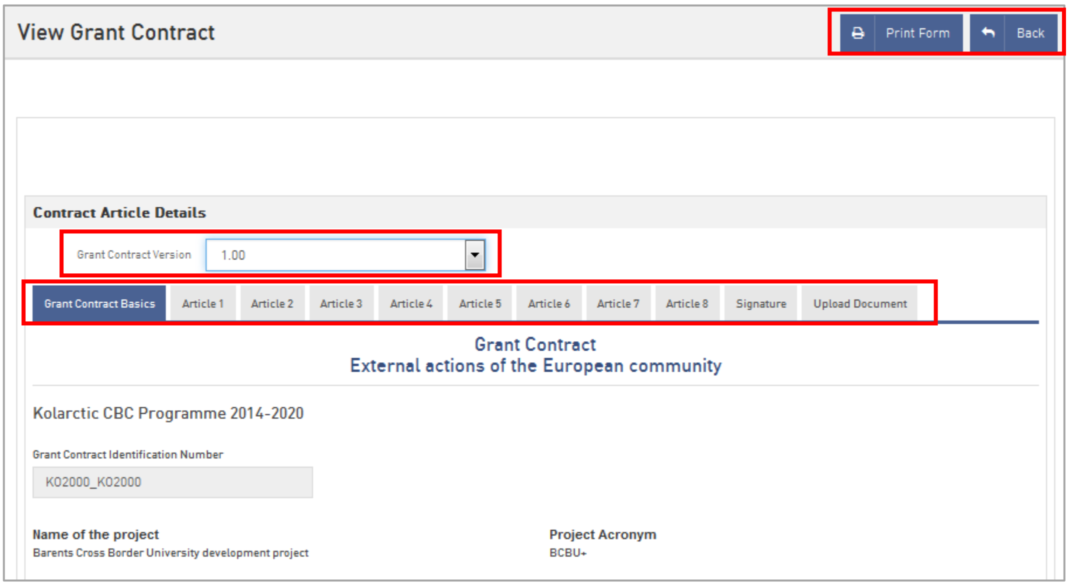
- Selection  to change Home page view from Application details view to Project Management Dashboard.
- **Application and Contracting documents**: This section contains the links to:
  Concept Note (only for Restricted Call for Proposal)
  Application
  Grant Contract
  Executive Order
- **Application status**: contracted

To **log out** from the system click on  at the top-right corner of the window.

5.2. GRANT CONTRACT VIEW

Applicant view the details of the Grant Contract by clicking the **Grant Contract** link in the PROMAS **Home page**.

View Grant Contract page appears.



View Grant Contract page has following features:

- Buttons:

  Print Form: opens file for downloading or opening

  Back: leads to the Home page

- **Grant Contract Version**: You can view different versions of Grant Contract

- The Content of the Grant Contract divided to tabs:

  Grant Contract Basics

  Article 1: Purpose

  Article 2: The Obligations of the Lead Partner

  Article 3: Implementation period of the Project

  Article 4: Costs and Financing of the Project

  Article 5: Narrative and financial reporting and payment arrangements

  Article 6: Auditing and Verification Requirements

  Article 7: Annexes

  Article 8: Other specific conditions applying to the project

  Signature

  Upload Document: Attachments