PROMAS

USER GUIDE FOR PROJECT PARTNER

Version control:

Version ID	Change date	Modifier	Rationale	Description
1.01	29.03.2019	T. Nurmi	Version control added	Phase 2 (&3) Project partner instructions
1.02	1.4.2019	T. Nurmi	Minor updates	Chapter 3.3 Minor picture/text updates. Chapter 3.4 minor updates
1.03	2.4.2019	T. Nurmi	Minor updates	Chapter: 2.1 Pics/minor text updated
1.04	4.4.2019	T. Nurmi	New chapter	Chapter 2.3 added
1.05	5.4.2019	T. Nurmi	New chapter	Chapter 3.2 added
1.06	17.05.2019	T.Nurmi	Some clean up and minor updates	Project update/interim report authority approval chapters removed. Purchase Annexes added
1.07	10.06.2019	T.Nurmi	Minor update	Final report reopened email updated
1.08	18.08.2019	T.Nurmi	New chapter	Chapter 3.2 Request for partner changes added

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# 1.	Requesting payments

During the project life cycle, project partner can request following payments via PROMAS:

- First pre-financing payment
- Interim payment
- Final payment

Project partner must supplement the payment request with corresponding reports that are described later in this user guide:

- Interim payment request with Interim report
- Final payment with Final report

## 1.1	Payments

With this functionality project partner can create and submit payment requests to the authorities.

Choose Project management > Payments. Payments window opens.

Following functionalities and information is displayed and available in the Payments page:
- Search functionality
- Add new functionality

- Delete selected functionality (only for drafts)
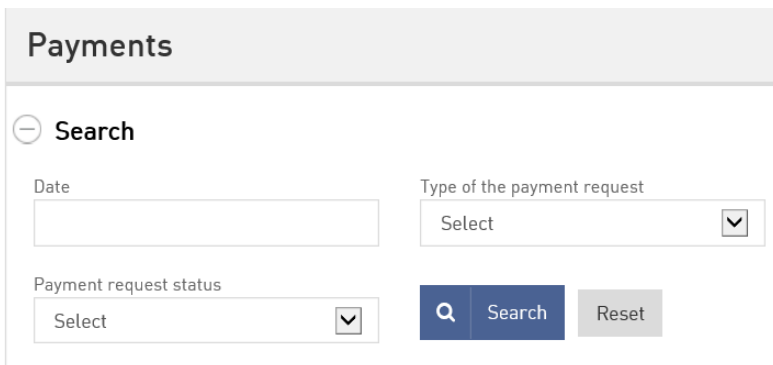
Please note that when project partner is accessing payments page first time there will not be any information available in the result view. After creating first payment request, the details of the payment request are displayed as follows:

- Project name
- Date. Date when payment request has been submitted
- Status. Payment request status: Draft, Submitted, Approved
- Type of payment request: First pre-financing payment, Interim payment, Final payment
- Support function buttons:
  - Payment request. View payment request with statuses Submitted and Approved
  - Edit. Edit the payment request with status draft
  - Payment order. Payment order will be visible when Payment request status is approved
  - Delete (only for status Draft).

1.2   Search payments

Click **+ sign** on the left side of Search text

Search options are displayed

Available search options are:

1. **Date**. Calendar selection for the date of the payment request submission date

2. **Type of payment request.** Dropdown list {First pre-financing payment, Interim payment, Final payment}

3. **Payment request status** = Dropdown list

   - **Draft**. Project partner has started to work with the payment request but has not submitted it (not visible to Authority)

   - **Submitted**. Project partner has submitted the payment request but authority has not approved it

   - **Approved**. Payment request has been approved by Authority

Click Search push button to excecute the search. Reset push button clears the given search criterias.

Search result is displayed and is having same content that Payments page.

1.3   Create payment request

Choose Project management> Payments. Choose Add new on the left.

+ Add new
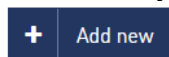
Add payment request page is opened. Add payment request page contains following information and input fields for the project partner to be filled for the payment request.

Add payment request   🖨 Print PDF   ↩ Back

Fields marked with asterisk (*) are mandatory.

Basic information

Name of the project: Sadesieniä
Project ID: AMush1000
Business ID: AMush1000_1111
Priority: Mushroom know how
Implementation period of the project: 19/10/2017 to 27/10/2017 (0 Months)
Name of the lead partner: Puolangan sienestäjät ry
Postal address: 909999 Puolanka

Basic information:
- Name of the project
- Project ID
- Business ID (from Grant contract)
- Priority
- Implementation period of the project
- Name of the lead partner
- Postal address

Payment request

Date	19/05/2017
Contact person of the action	
Telephone	
Email	
Contact person for accounting	
Telephone	
Email	

Following information is needed to provide for the payment request:

- Date. Calendar selection for the payment request date.
- Contact person of the action.

- Telephone.
- Email. Email check validation.
- Contact person for accounting.
- Telephone.
- Email. Email check validation.

Payment type selection:

- First pre-financing payment

Type of the payment request *	First pre-financing payment ▼
Requested amount *	0,00 €

- Interim payment/Final payment

Type of the payment request *	Interim payment ▼
Start date of the reporting period *	
End date of the reporting period *	
Requested amount *	0,00 €
Verified expenditure *	0,00 €

- Type of the payment request {First pre- financing payment, Interim payment, Final payment} Mandatory
- Start date of the reporting period.Calendar selection (mandatory). Not available with first pre-financing payment
- End date of the reporting period. Calendar selection (mandatory). Not available with first pre-financing payment
- Requested amount
- Verified expenditure Not available with first pre-financing payment

Provide payment receiver details:

Payment receiver
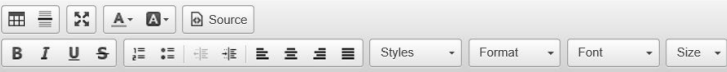
Name of the account owner	
IBAN number	
Account number (non IBAN)	
BIC/SWIFT code	
Additional Information	⊞ ≣ ⤢ A▾ A▾ Source B I U S ¦≡ ≔ ⊣≣ ⊩≣ ≣ ≣ ≣ ≣ Styles ▾ Format ▾ Font ▾ Size ▾

- Name of the account owner
- IBAN number
- Account number (non IBAN)
- BIC/SWIFT code

- Additional information input field

Signature and attachments:

|	I hereby certify that the information contained in this request is complete, faithful and reliable.
Name	Hudson Hawk
Position	Clerk
Date	31/05/2017

Save & Stay   Submit   Cancel

Attachments

Attachment file		Browse

Upload   Cancel

File Name	Download	Delete
OK.docx	⬇	🗑

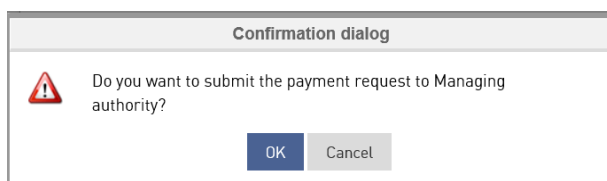- Project partners name
- Position
- Date

Project partner can also add attachments to the payment request.

User can save the work and stay in the add payment request page by pressing Save & Stay push button. System confirms that the payment request was updated succesfully.

Information dialog

Payment request updated successfully.

OK
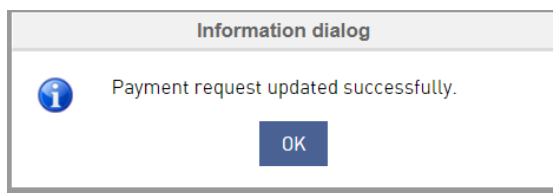
Once the payment request is ready, project partner can submit by Submit push button.

A window confirms that project partner wants to submit the payment request to the Managing authority.

Confirmation dialog

Do you want to submit the payment request to Managing authority?

OK   Cancel

System confirms that payment request has been submitted succesfully and takes the project partner to the payments page.

Information dialog

ℹ Payment request updated successfully.

OK
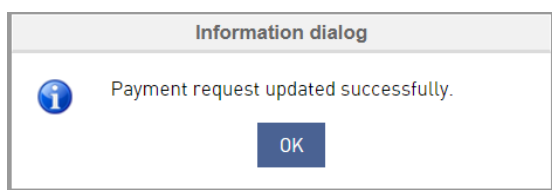
1.4 View payment request

Choose Project management > Payments. Click on the View icon of the the payment request that you want to view.

View Payment Request
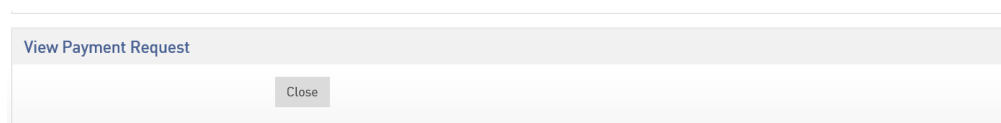
Close

By Close push button to return back to Payments page.

1.5 Edit payment request

Choose Project Management > Payments. Click on the Edit icon of the payment request that you want to edit.

☐	Project name	Date	Status ▲	Type of the payment request	Payment request	Edit	Payment order	Delete
☐	Hawk hunting	02/06/2017	Draft	Interim payment	🔍	✏		🗑

Payment request page is opened for the editing.

Edit the payment request and click Save push button.

A window confirms the update.

Information dialog

ℹ Payment request updated successfully.

OK
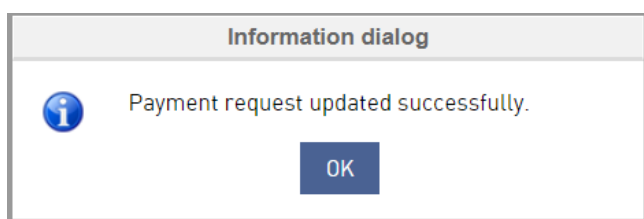
1.6 View payment order

Choose Project Management > Payments. Click on the View icon of the the payment order that you want to view.

| Home | Support | User rights | Project management |

Payments

⊖ **Search**

Date

Type of the payment request
Select ▼

Payment request status
Select ▼

🔍 Search   Reset

➕ Add new

Delete selected

	Project name	Date ▼	Status	Type of the payment request	Payment request	Edit	Payment order	Delete
☐	Sadesieniä	09/10/2017	Approved	First pre-financing payment	🔍		🔍	

Payment order page is opened. Following information is displayed on payment order details page:

Payment order details   🖨 Print PDF ↩ Back

Basic information

Name of the project: Sadesieniä
Project Id: AMush1000
Business ID: wew1222
Priority: Mushroom know how
Implementation period of the project: 19/10/2017 to 27/10/2017 (Months)
Name of the lead partner: Puolangan sienestäjät ry
Postal address: 909999 Puolanka

Payment request information

Date of the payment request: 09/10/2017
Requested amount: 30.00
Verified expenditure: 0.00
Type of the payment request: First pre-financing payment

Basic information:
- Name of the project
- Project ID
- Business ID (from Grant contract)
- Priority
- Implementation period of the project
- Name of the lead partner
- Postal address

Payment request:
- Date of the payment request
- Reporting period{only with Interim payment and Final payment}
- Type of the payment request {First pre- financing payment, Interim payment, Final payment}

- Requested amount
- Verified expenditure {only with Interim payment and Final payment}

Managing authority

topi
Korvasienenkuja 6789

Payment order made by

Name | Topi Nurmi

Email | topi.nurmi@testlab.fi

Telephone number |

Managing Authority details (from Grant contract) showing following editable information:
- Managing Authority (e.g. Karelia CBC Programme)
- Address

Author of the payment order:
- Name
- Email
- Telephone number

Reported costs per cost element from the budget template updated by the authority and Expenditure verification report details are shown.

Reported costs

Travel | 200 | €

Training | 200 | €

Licences | 200 | €

Salaries | 200 | €

Total | 800 | €

Expenditure verification report

Reported costs | 800 | €

Verified costs | 600 | € | 75 | %

Approved costs per cost element from the budget template are also be visible.

Approved costs

Travel	150	€
Training	150	€
Licences	100	€
Salaries	200	€
Total	600	€

Ineligble expenditures are also visible in the payment order.

Ineligible expenditure

Verificate	Justification	Euros	
	OOK	100	€
Total		100	€
Difference		700	

Payment decision in Total and specification of the payment decision.

Decision on payment, TOTAL

FINLAND	100	€
Norway	100	€
Sweden	100	€
Russia	0	€
EU	200	€
Total	500	€
Additional information		

Specification of the decision on payment

Name of the receiver	Topi
Bank Acount Number	11111
SWIFT	22222
FINLAND	100.00
Norway	100.00
Sweden	100.00
Russia	100.00
EU	100.00
Total	500
Additional information	Alles kyyd

Outside funding information, Payment approval details and Signatures

1.7   Delete payment request

Choose Project management > Payments. Click on the Delete icon of the question that you want to delete or alternatively tick the tickbox front of the question and press Delete selected push button. Deletion can be done only requests with status draft.

System ask to confirm the deletion

and confirms the deletion.

Information Dialog

Record deleted successfully.

OK
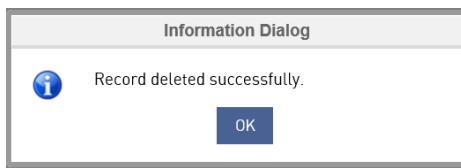
2. Manage project reports

During the project life cycle, project partner is required to provide following reports via PROMAS to the authorities:

- Project update
- Interim report
- Final report

Choose Project management > Project reports. Manage project report page is opened.

| Home | Support | User rights | Project management |

Manage project reports

○ Project update ○ Final report ○ Interim report

+ Add new

Delete selected

☐	Report type	Start date of the reporting period ▲	End date of the reporting period	Status	Submitted date	View	Edit	Delete
☐	Project update	21/09/2017	21/09/2017	Pending			✏	🗑

Page size : 20 Records 1 to 1 of (1) 1

In this view Project partner can create following reports:
- Project update
- Final report
- Interim report

By selecting report type to be created and by pressing Add new push button.

Manage project reports view contains following information of the created reports of the project partner:
- Report type {Project update, Interim report, Final report}
- Start date of the reporting period
- End date of the reporting period
- Status {Draft, Submitted, Reopened, Approved}
- Submitted date
- Support function buttons {View with statuses, Submitted & Approved, Edit with statuses Draft & Reopened, Delete with statuses Draft & Reopened}

2.1 Project update report

Select Project update radiobutton from the manage project reports view and press Add new push button. Project update page opens.

Project update report is divided into three different tabs:

- Basic information
- Project progress
- Annexes

2.1.1 Basic information

In the Basic information view partner and project details are updated as the default from the Grant Contract and project partner needs to provide following information:

- Start date of the project
- End date of the project
- Start date of the reporting period
- End date of the reporting period

Project partner can save the updates and move to the next tab by pressing Save & Next push button.

2.1.2 Project progress

In Project progress view, project partner is asked to provide following information:

- Progress of the implemented activities in relation to all project activities (%):
- Level of incurred expenditure in relation to the total budget (%):
- Has the project been able to follow the indicative work plan? If no, why? Textfield
- Is there need to change the work plan? If yes, describe the needed changes. Textfield
- Description of the progress of the project:

Project partner can save the updates and move to the next tab by pressing Save & Next push button.

2.1.3   Annexes

In Annexes view, project partner can attach annexes and provide contact information details. Project partner can save the project update as a draft or submit it by pressing Submit push button.

System asks to confirm the submission of the report.

Press OK. System confirms that report has been submitted successfully.

2.1.4   Project update reopened by the authority

Authority might require additional information to be provided for the project update. In this case, Authority Reopens the report and indicates what type of information is required from the project partner for the project update.

Project partner will receive an email of the reopened project update:
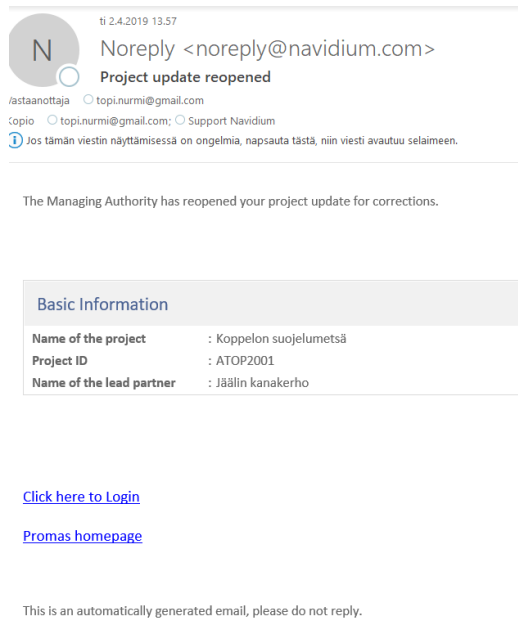
In the manage project reports, status of the project update has changed to reopened and it is editable for the project partner.

Project partner opens the report for editing by clicking Edit icon of the project update.

Project update view opens.

Project update   Comments   Back

Basic Information   Project Progress   Annexes

Basic Information

Name of the lead partner	Jääli hunt klubben
Name of the project	Hawk hunting
Project ID	TOPI4000
Partners	Jääli hunt klubben
Start date of the project	13/06/2017
End date of the project	30/06/2017
Start date of the reporting period	14/06/2017
End date of the reporting period	15/06/2017

                                                    »   Save & Next

By clicking Comments push button, project partner can see what authority user has requested to be provided as additional information for the project update.

Comments   ✕

1

Please update project plan

— By admin on *23/11/2017 09:01*

Project partner provides the requested additional information and Submits the project update with additional comments by pushing Submit push button.

Additional comments

Comments   Updated

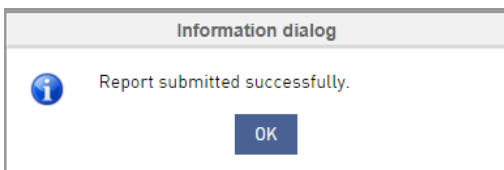   «   Previous   💾   Save as Draft   💾   Submit

Confirmation dialog

⚠   Are you sure you want to submit this project update
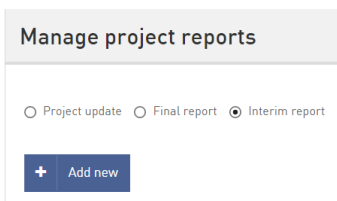
        OK   Cancel

Press OK. System confirms that project update has been submitted successfully.

2.2   Interim report

Select Interim report radiobutton from the manage project reports view and press Add new push button.

Interim report view opens.

Interim report is divided into following different sections by following Tabs:

- Basic information
- Summary
- Work plan
- Indicators
- Communication and visibility
- Annexes
- Signature

2.2.1   Interim report - Basic information

In the basic information view, partner and project details are updated as the default from the Grant Contract and project partner needs to provide following information:

- Start date of the project
- End date of the project
- Start date of the reporting period
- End date of the reporting period

Project partner can save the updates and move to the next tab by pressing Save & Next push button.

2.2.2   Interim report - Summary

In the summary section of the interim report, project partner can add free text to describe the implemented projet activities, financial situation, addressed challenges and cooperation between partners during the reporting period.

Project partner can save the updates and move to the next tab by pressing Save & Next push button.

2.2.3   Interim report – Work plan

Project partner can update the activity work plan for the project. Updated activity plan is a new version of the activity plan as original Activity plan will remain as it was in the application. In case several Interim reports will be created, and activity plan will be updated, the previous activity plan in the approved interim report will be the template for the new version of the activity plan in the new Interim report.

View interim report

| Basic information | Summary | Work plan | Indicators | Communication and visibility | Annexes | Signature |

New activity can be added by clicking Click + sign.

Describe implementation of the activities, completed outputs, if any, locations where activities took place

Name	Description	Output	Region
Sienikartta		Kartta	Finland-Kaenuu
Kartan jakeli			Finland-Lappi Russia-West Russia
Sienien keruu			Finland-Lappi Russia-West Russia
Ryöppäys	Kiehuva vesi	val	Finland-Lappi

⊕

And existing activity can be edited or edited by double clicking task name in the activity planner.

Activity planner

○ Day ○ Week ○ Month ● Year

| Task name | Start time | Duration | ✚ | | | | | 2017 | | | | | | | | | |

Task name	Start time	Duration		Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
⊟ 🗁 Sadesienia	2017-09-13	99	✚											Sadesieniä			
🗎 Sienikartta	2017-09-13	8	✖											Si			
🗎 Kartan jakeli	2017-09-20	9	✖											Ka			
🗎 Sienien keruu	2017-10-19	63	✖											Sienien keruu		

Task: Kartan jakeli
Duration: 9 Day(s)
Status of the activity: To_do

Activity pop up window opens for creating a new task or editing purposes.

Project partner can input the needed information for the activity and then save the changes. Also, activity can be deleted by pushing Delete push button.

Updated activity is visible the work plan and activity planner view as well as in the RACI matrix.

2.2.4 Interim report - Indicators

In indicators part of the Interim report, project partner is expected to provide realised cumulative value for thematic indicators and project specific indicators.

Project partner can save the updates and move to the next Tab by pressing Save & Next push button.

2.2.5   Interim report – Communication and visibility

Project partner can update the implemented communication and visibility activities to this part of the interim report. Once completed, project partner can save the update and move to the next Tab by pressing Save & Next push button.

2.2.6   Interim report – Annexes

Interim report   ↩ Back

| Basic information | Summary | Activities | Indicators | Communication and visibility | **Annexes** | Signature |

Annexes

Annexes

Description *
[   ]

Attachment file * [   ] [Browse]

[Upload] [Reset]

Annexes:

« Previous   » Save & Next

In Annexes section, project partner can attach documents to interim report. Once needed documents have been attached project partner can move to the signaturetab by pressing Save & Next push button.

2.2.7   Interim report – Signature

Interim report   ↩ Back

| Basic information | Summary | Activities | Indicators | Communication and visibility | Annexes | **Signature** |

Contact information

Filled in by   [Puolangan sienestäjät ry   ]

Date   [24/11/2017   ]

Contact person name   [   ]

Email   [   ]

Telephone   [   ]

Signature

Name   [   ]

Position   [   ]

Date   [   ]

Signature

_____

« Previous   💾 Save as Draft   💾 Save

In signature section of the interim report, project partner must provide contact person details:
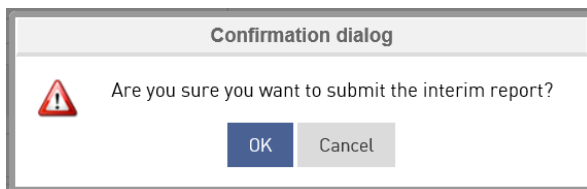
- Filled in by
- Date
- Name of the contact person
- Email
- Telephone

Project partner must also sign the interim report by providing:
- Name
- Position
- Date
- Signature (printed report)

Once report is ready, Project partner can submit the report by pressing Save push button. System ask to confirm the report sending.

Press OK and system confirms that report has been submitted successfully.
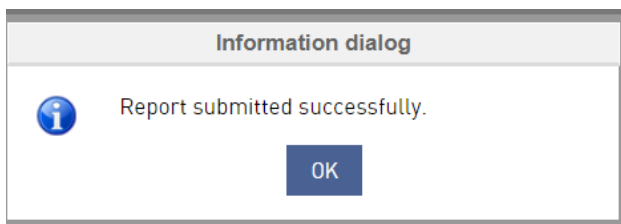
2.2.8 Interim report reopened by the authority

Authority might require additional information to be provided for the Interim report. In this case, authority reopens the report and indicates what type of information is required from the project partner for the interim report.

Project partner will receive an email of the reopened Interim report.

ke 3.4.2019 8.41

N

Noreply <noreply@navidium.com>

Interim report reopened

Vastaanottaja   ○ topi.nurmi@gmail.com

Kopio   ○ topi.nurmi@gmail.com; ○ Support Navidium

ⓘ Jos tämän viestin näyttämisessä on ongelmia, napsauta tästä, niin viesti avautuu selaimeen.

The Managing Authority has reopened your interim report for corrections.

Basic Information

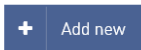|	
Name of the project	: Koppelon suojelumetsä
Project ID	: ATOP2001
Name of the lead partner	: Jäälin kanakerho

Click here to Login

Promas homepage

This is an automatically generated email, please do not reply.

In the manage project reports, status of the interim report has changed to reopened and it is editable for the project partner.

Manage project reports

○ Project update   ○ Final report   ○ Interim report

+ Add new

Delete selected

☐	Report type	Start date of the reporting period ▲	End date of the reporting period	Status	Submitted date	View	Edit	Delete
	Project update	27/08/2018	30/08/2018	Approved	27/08/2018	🔍		
	Interim report	28/08/2018	29/08/2018	Reopened	27/08/2018	🔍	✏️	

Project partner opens the report for editing by clicking edit icon of the interim report.

Interim report view opens.

By clicking Comments push button, project partner can see what Authority user has requested to be provided as additional information for the interim report.
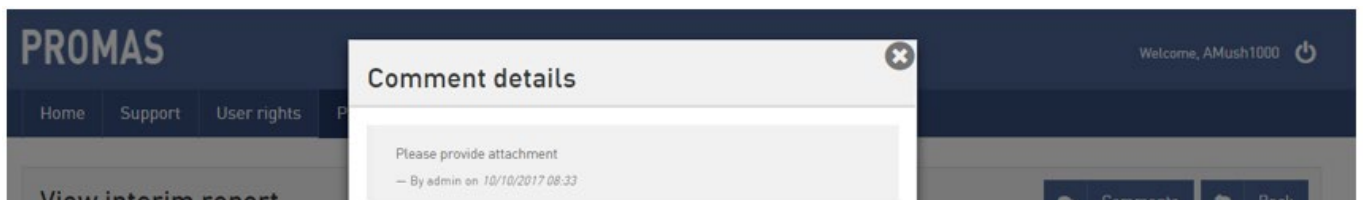
Project partner provides the requested additional information and Submits by pushing Submit push button. Authority will receive an email of the submitted interim report.

2.3   Final report

Select Final report radiobutton from the manage project reports view and press Add new push button.

Add final report view opens.

Add final report

Basic information | Activities | Indicators | Results | Impact | Monitoring and evaluation | Environmental impact | Communication and visibility

Assessment of project administration | Assessment of the programme | Annexes

Basic information

Name of the lead partner	Jäälin kanakerho
Name of the project	Koppelon suojelumetsä
Project ID	ATOP2001
Partners	Jäälin kanakerho
Start date of the project	
End date of the project	

Save & Next

Final report is divided into following different sections by following Tabs:

- Basic information
- Activities
- Indicators
- Results
- Impact
- Monitoring and evaluation
- Environmental impact
- Communication and visibility
- Assesment of project administration
- Assessment of the programme
- Annexes

2.3.1 Final report - Basic information

In the basic information view, partner and project details are updated as the default from the Grant Contract and project partner needs to provide following information:

- Start date of the project
- End date of the project

Project partner can save the updates and move to the next tab by pressing Save & Next push button.

2.3.2 Final report - Activities

In the activity section of the Final report, project partner is requested to provide information to the following sections:

- 1.1 Describe the status of the activities at the end of project

- 1.2 Describe the changes made to the work plan, and reasons to the changes, during the implementation of the proejct

- 1.3 Assess the functionality of the original work plan (activities, schedule and responsibilities) in reaching the objectives of the project

Project partner can save the updates and move to the next tab by pressing Save & Next push button.

2.3.3　　　　Final report – Indicators

In indicators part of the Final report, project partner is expected to provide realised cumulative value for thematic indicators and project specific indicators.

Project partner can save the updates and move to the next Tab by pressing Save & Next push button.

2.3.4　　　　Final report – Results

In the result section of the Final report, project partner is requested to provide information to the following sections:

- 3.1 Describe the results of the project

- 3.2 Were the objectives described in the logical framework met? if not, why?

- 3.3 Were the objectives relevant? if not, why?

- 3.4 How did the project contribute to the cross-cutting issues of the programme?

Project partner can save the updates and move to the next tab by pressing Save & Next push button.

2.3.5   Final report – Impact

In the impact section of the Final report, project partner is requested to provide information to the following sections:

- 4.1. How and by whom will the project's main outputs be further utilised once the project has been finalised?

- 4.2. How will the sustainability of the expected results be maintained financially and operationally?

- 4.3. Describe the expected impact of the project within next five years

Project partner can save the updates and move to the next tab by pressing Save & Next push button.

2.3.6   Final report – Monitoring and evaluation

Partner must provide the answer to the following question in monitoring and evaluation section:

- 5.1. Describe the monitoring and evaluation arrangements; how the project implementation and achieving of the results were monitored and evaluated?

Project partner can save the updates and move to the next tab by pressing Save & Next push button

2.3.7 Final report – Environmental impact

Edit final report

Comments | Print PDF | Back

Basic information | Activities | Indicators | Results | Impact | Monitoring and evaluation | **Environmental impact** | Communication and visibility

Assessment of project administration | Assessment of the programme | Annexes

Environmental impact

6.1 Does the project have any negative or positive environmental impact? Analyze the environmental impact, if any

B *I* U S | Styles | Normal | Font | Size

In the Environmental impact section of the Final report, project partner is requested to provide information to the following question:

- 6.1 Does the project have any negative or positive environmental impact? Analyze the environmental impact, if any

Project partner can save the updates and move to the next tab by pressing Save & Next push button

2.3.8   Final report – Communication and visibility

Project partneris requested to update the implemented communication and visibility activities to this part of the Final report:

- 7.1. Describe the communication and visibility channels, tactics and tools that were used in the project

- 7.2. Describe the impact of the communication and visibility activities

- 7.3. Summary of the project including objectives, main activities and achievements of the project . The summary will be published by the Managing Authority.

 Once completed, project partner can save the update and move to the next Tab by pressing Save & Next push button.

2.3.9   Final report – Assessment of the project administration

In the assessment of the project administration section of the Final report, project partner is requested to provide information to the following question:

- 8.1. Assess the project management (reporting, internal communication, division of the tasks)

- 8.2. Assess the financial management of the project.

- 8.3. Assess the cooperation between the partners

- 8.4. Lessons learnt

Project partner can save the updates and move to the next tab by pressing Save & Next push button

2.3.10   Final report – Assessment of the programme

Project partneris requested to update the implemented communication and visibility activities to this part of the Final report:

- 9.1. Assess the XXX programme as a financing instrument

- 9.2. Assess the cooperation with the Managing Authority and Branch Office(s)

- 9.3. Suggestions for improvements

Once completed, project partner can save the update and move to the next Tab by pressing Save & Next push button.

2.3.11   Final report – Annexes

In Annexes section, project partner can attach documents to Final report.

Assessment of project administration	Assessment of the programme	**Annexes**

Annexes

Annexes

Description *	
Attachment file *	[ ] Browse
	Upload Reset
Annexes	File name Description Download Delete
	No record found.

Contact information

Filled in by	Jäälin kanakerho
Date	04/04/2019
Name of the contact person	
Email	
Telephone	

Signature

Name	
Position	
Date	
Signature	

_____

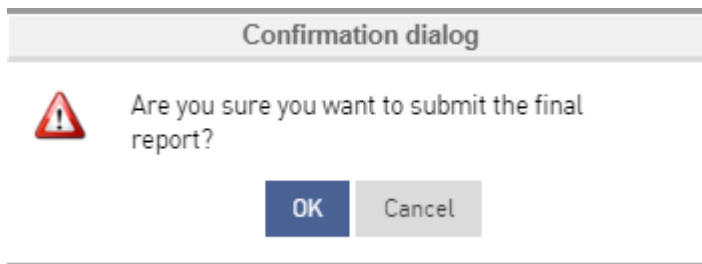« Previous   💾 Save as Draft   💾 Submit

In signature section of the Final report, project partner must provide contact person details:

- Filled in by
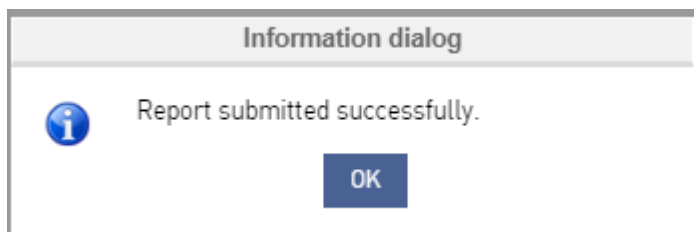- Date
- Name of the contact person
- Email
- Telephone

Project partner must also sign the Final report by providing:
- Name
- Position
- Date
- Signature (printed report)

Once report is ready, Project partner can submit the report by pressing Submit push button. System ask to confirm the report sending.

Confirmation dialog

⚠ Are you sure you want to submit the final report?

OK   Cancel

Press OK and system confirms that report has been submitted successfully.

Information dialog

ⓘ Report submitted successfully.

OK

2.3.12   Final report reopened by the authority

Authority might require additional information to be provided for the Final report. In this case, authority reopens the report and indicates what type of information is required from the project partner for the Final report.

Project partner will receive an email of the reopened Final report.

In the manage project reports, status of the Final report has changed to reopened and it is editable for the project partner.

Project partner opens the report for editing by clicking edit icon of the Final report.

Final report view opens.

By clicking Comments push button, project partner can see what Authority user has requested to be provided as additional information for the Final report.

Project partner provides the requested additional information and Submits by pushing Submit push button. Authority will receive an email of the submitted Final report.

2.3.13   Final report approved by the authority

When Final report is approved by the authority, status of the final report changes to Approved. Please note that project partner will not receive any email concerning the approval of the final report.

3.   Project Management

3.1   Request for change

Choose Project Management > Request for change. Request for change page is opened. In case there is no previous requests for change done, result view is empty.

In the Requests for change result view, the details are displayed as follows:
- Project ID
- Submission date
- Change request status (Draft, Submitted, Rejected, Approved)
- Edit with status Draft
- Delete with status Draft
- View (with status: Draft, Submitted, Approved, Rejected)

Click Add new push button to create a new Request for change.

Add request for change page is opened which contains following information and input fields for the project partner to be filled for the request for change.

Basic information:
- Name of the lead partner
- Name of the project
- Project ID
- Priority
- Implementation period of the project

Project partner must provide following request basic information:

- Date
- Change; Activities, Budget, Implementation Period, Others

- Proposed change

Request for change details

Date * 28/08/2018

Change *
- Select
- Activities
- Budget
- Implementation Period
- Other
- Partners

Proposed change

Styles ▾ Format ▾ Font ▾ Size ▾

Project partner must also provide:

- Grounds for the change
- Budget impacts

And details of the requestor:
- Organization
- Name
- Position

Grounds for the change

Budget impacts

Requested by

Organization

Name

Position

Annexes

Attachment file   Browse

Upload   Reset

File name   Download   Delete

No files uploaded.

Save as Draft   Submit   Cancel

Project partner can also attach attachments to the request for change.

By pressing Submit project partner can submit the request for change for Authority review and approval.
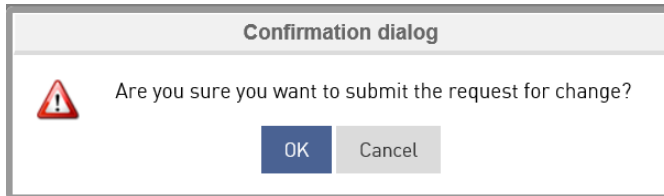
Press OK.
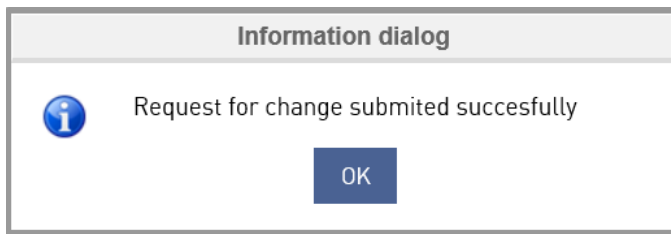
3.1.1 Change request decisions by the authority

Decision of the authority for the request for change can be seen from the change request status.

Click View icon for the request that you want to view.

Decision

Decision made by	Topi Nurmi
Decision	Approved
Grounds	
Contract addendum to be made	No
Date	27/09/2017

Decision of the authority is visible from the Decision section:

- Decision made by
- Decision: Approved or Rejected
- Grounds
- Contract addendum to be made: Yes or No
- Date

3.2   Request for partner change

Choose Project Management > Request for partner change. Request for partner change page is opened. In case there is no previous requests for change done, result view is empty.

Home	Support	User rights	Project management	Documents

Request for partner change

+ Add new To add a new partner, click Add new.

− Remove To remove an existing partner, click remove button.

Partner	Country	Region	Type ▲	Active	Add/Edit information	View
Demo emo	Finland	Rovaniemi	Partner	Inactive	✏	🔍
Samin mopot	Finland	Rovaniemi	Partner	Inactive		🔍
Lalun lelut	Russia	Murmansk	Partner	Active		🔍
Hölkky pölkky	Finland	Rovaniemi	Partner	Inactive	✏	🔍
Partnerin lisäys	Finland	Rovaniemi	Partner	Active		🔍

Page size : 20 ▾   Records 1 to 6 of (6)   1

In the Requests for partner change result view, the details are displayed as follows:
- Partner name
- Country
- Region
- Partner type
- Partner status (Inactive, Active)

- Add/Edit information (for inactive partners only or requests that have not been submitted)
- View

Requests for partner changes which have been submitted but not yet approved by the authority are displayed as follows:

- Partner request for adding new partner, displayed in green color with status Inactive, once approved by the authority, color changes to black and status to Active
- Partner request for removing existing partner, displayed in red color with status Active, once approved by the authority, color changes to grey and status to inactive

3.2.1　　　Request for adding a new partner

Click Add new push button to create a new Request for new partner.

Request for partner change page is opened which contains following information and input fields for the project partner to be added.

Request for partner change　　　　　　　　　　　　　　　　　　↰ Back

Identity

Type	Partner
Full legal name	
Name of the organisation in original language	
Country	Select ▼
Region	Select ▼
Department/ unit in charge of the activities	
Business ID	
Legal status	Public ▼
Type of organisation	Select ▼
Description of the organisation	
Official address	
Postal address	
Telephone number	
Email of the organisation	
Website of the organisation	

Provide/update following Identity information for the Lead Partner:

- Name of the organisation in original language (from Concept Note)
- Country
- Reqion
- Department/unit in charge of the activities
- Business ID
- Legal status (Selection; Public or Private)
- Type of the organisation (Selection from the list)
- Description of the organisation
- Official address
- Postal address
- Telephone number
- Email of the organisation
- Website of the organisation

Continue with providing contact person details:

Contact person

Name	Topi Nurmi
Position	Sienivastaava
Telephone number	
Email	

Fill the Motivation and Capacity sections:

Motivation

What is the role of the partner in the project?

Why does the organisation participate in the project (reason and motivation)?

How does the organisation benefit from participating in the project?

Operational capacity

What are the organisation's thematic competences and experiences relevant for the project?

Describe the organisation's previous experience in participating in and/or managing EU co-financed projects or other international projects.

In the case of partners from outside the programme's core area: What is the added value of this partner for the project?

Provide Financial capacity information.

Financial capacity

Does the organisation have a euro based bank account or can it be established?	○ Yes ⦿ No ○ NA
Can the project costs be separately allocated and reported in the organisation's bookkeeping?	○ Yes ⦿ No ○ NA
Can the organisation transfer or receive programme funding to/from other project partners?	○ Yes ⦿ No ○ NA
Does the organisation participate in the financing of the project?	○ Yes ⦿ No
Organisation's average annual turnover	[ ] €

Other public financing

Other public financing in the field of this application within 3 previous years.

Financier name	Name of the project	Amount
⊖ [ ]	[ ]	[ ]
⊕		

Has public financing for same or similar activities been applied for?   ○ Yes ⦿ No

Provide following basic information for the request for partner changes:

- Date
- Change: default value Partners
- Proposed change

Request for change

Date *	
Change *	Partners ▼
Proposed change	[toolbar: ⊞ ▤ ⤢ A▾ A▾ ⊕ Source] [B I U S ⊟ ⊟ ⊟ ⊟ ⊟ ⊟ ⊟ ⊟ Styles ▾ Format ▾ Font ▾ Size ▾]

Project partner must also provide:

- Grounds for the change
- Budget impacts

And details of the requestor:
- Organization
- Name
- Position

Grounds for the change	
Budget impacts	

Requested by

Organization	
Name	
Position	

Annexes

Attachment file	[Browse]
	[Upload] [Reset]

File name	Download	Delete
No files uploaded.		

[Save as Draft] [Submit] [Cancel]

Project partner can also attach attachments to the request for partner change.

By pressing Submit the request for partner change will be submitted for the authority review and approval.

Confirmation dialog

⚠ Are you sure you want to submit the request for change?

OK   Cancel

Press OK.

Information dialog

ℹ Request for change submited succesfully

OK

Click Remove push button to create a request for the removal of the existing partner.

Request for change page is opened. Provide following basic information for the request for partner changes:
- Date
- Change: default value Partners
- Partner selection; select the partner to be removed (existing & active partners)
- Proposed change

Request for change

Date *

Change *   Partners   ▼

Partner *   Lalun lelut
             Partnerin lisäys

Proposed change   [editor toolbar: B I U S, lists, alignment, Styles, Format, Font, Size]

Project partner must also provide:

- Grounds for the change
- Budget impacts

And details of the requestor:
- Organization
- Name
- Position

Project partner can also attach attachments to the request for partner removal.

 By pressing Submit the request for partner change will be submitted for the authority review and approval.

Press OK.

3.2.3 Partner change request decisions by the authority

Request for partner change

+ Add new	To add a new partner, click Add new.

− Remove	To remove an existing partner, click remove button.

Partner	Country	Region	Type ▲	Active	Add/Edit information	View
Demo emo	Finland	Rovaniemi	Partner	Inactive	✎	🔍
Samin mopot	Finland	Rovaniemi	Partner	Inactive		🔍
Lalun lelut	Russia	Murmansk	Partner	Active		🔍
Hölkky pölkky	Finland	Rovaniemi	Partner	Inactive	✎	🔍
Partnerin lisäys	Finland	Rovaniemi	Partner	Active		🔍
New partner demo emo	Finland	Rovaniemi	Partner	Inactive		🔍
Jopo Mopo			Partner	Inactive	✎	🔍

Page size : 20 ▼   Records 1 to 8 of (8)   1

Request for partner changes are visible also in the request for change view, where status of the request for change can be seen from the change request status.

Requests for change

+ Add new

Delete selected

☐	Project ID	Date	Request for change status	Edit/Add File	Delete	View
	ATOP1000	25/06/2019	Approved			🔍
	ATOP1000	25/06/2019	Approved			🔍
	ATOP1000	26/06/2019	Approved			🔍
	ATOP1000	26/06/2019	Approved			🔍
	ATOP1000	25/06/2019	Approved			🔍
	ATOP1000	25/06/2019	Submitted			🔍
	ATOP1000	25/06/2019	Approved			🔍
	ATOP1000	18/07/2019	Submitted			🔍
	ATOP1000	18/07/2019	Submitted			🔍
☐	ATOP1000	18/07/2019	Draft	✎	🗑	

Page size : 20 ▼   Records 1 to 10 of (10)   1

Also partner requests which has been saved as draft but not yet submitted are visible and editable and deletable (status Draft).

Click View icon for the request that you want to view.

Decision	
Decision made by	Topi Nurmi
Decision	Approved
Grounds	
Contract addendum to be made	No
Date	27/09/2017

Decision of the authority is visible from the Decision section:

- Decision made by
- Decision: Approved or Rejected
- Grounds
- Contract addendum to be made: Yes or No
- Date

3.3 Contract addendum

Go to Project management-> Addendums. Addendums page opens:

Addendums	
Date	View
05/04/2019	🔍
Page size : 20 ▾ Records 1 to 1 of (1)	1

In the Addendums view, the details are displayed as follows:
- Date (approval)
- View

Lead partner can view addendum by clicking View icon. Grant contract view is opened.

Click Addendum tab. Addendum view opens.

Change request details:
- Change request number
- Change
- Proposed change
- Grounds for the change
- Budget impacts
- Requested by
- Organization
- Name
- Position

Addendum

The following provision of the Grant Contract are replaced/completed as follows:

tekstiä

Date 05/04/2019

All other terms and conditions of the Grant Contract and its previous addendums remain unchanged. The addendum shall enter into force on the later date of signature by the Parties unless otherwise agreed.
Done in English in two originals: one original being for the Managing Authority and one original being for the Lead Partner.

Document

File name	Download
Admin check – KO 1st call for proposal - response.docx	⬇

For the Lead Partner		For the Managing Authority	
Name	Jaana	Name	Jaska
Position	Pomo	Position	Konttoristi
Date	05/04/2019	Date	05/04/2019

Addendum details:
- The following provision of the Grant Contract are replaced/completed as follows
- Date
- Attachements
- Signatures

3.4   Memorandum

In case memorandums are prepared by the authority, lead partner can view memorandums in Promas.

Go to Project management-> Memorandum. Memorandum page opens:

Memorandums

Name of the memorandum ▾	Date	View
Topi's change	01/04/2019	🔍

Page size : 20 ▾   Records 1 to 1 of (1)   1

Click View icon. Selected memorandum opens.

View memorandum

Basic information

Name of the lead partner: Karelia mushrooms
Name of the Project: Business mushrooms
Project ID: Amush2000
Priority: Mushroom crossborder commercialization
Implementation period of the project: 22/03/2018 - 29/03/2018

Memorandum details

Issue	Cost
Description	Tetx
Name	Topi Nurmi
Date	26/03/2018

Close

Annexes

Attachment file	File name	Download
	Free_ITIL_Training_Download_Report.pdf	📥

Following information is displayed.

Project Basic Information:
- Name of the lead partner
- Name of the project
- Project ID
- Priority
- Implementation period of the project

Memorandum details:
- Issue
- Description
- Name of the authority
- Date

Press Close push button to get back to Memorandum main page.

3.5   Project summary

Select Project Management > Project summary. Manage project summary view is opened.

Manage project summary

Project information	Managing authority	Partners	Personnel list	Purchases

Project information

Project ID	ATOP1001
Start date of the project	01/04/2019
End date of the project	18/04/2019
Extended end date	
Grant	6 000 €
Total costs of the project	9 000 €

» Next

Application status details

Contracted   01/04/2019 Topi Nurmi

Ongoing   01/04/2019

Status   ● Ongoing ○ Terminated ○ Finalised

Description *

Manage project summary view is divided into following tabs:
- Project information
- Managing authority
- Partners
- Personnel list
- Purchases

Application status details (maintained by Authority):
- Contracted date
- Ongoing date
- Status: Ongoing, Terminated, Finalised
- Description

Confirmation dialog

⚠ Are you sure you want change project status?

OK   Cancel
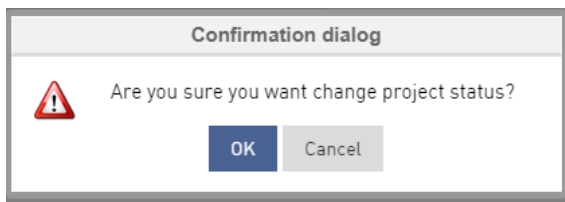
3.5.1 Project information

Project information tab contains following information:

- Project ID (from Grant contract)
- Start date of the project (from Grant contract)
- End date of the project (from Grant contract)
- Extended end date
- Grant
- Total cost of the project

3.5.2 Managing authority

Manage project summary

| Project information | Managing authority | Partners | Personnelist | Purchases |

Managing authority

Contact person ▲	Position	Telephone number	Email	View
tipoj				🔍
Topi	Jopo	678799		🔍

Page size : 20 ▼   Records 1 to 2 of (2) | 1 |

« Previous   » Next

The details of the contact person of the managing authority can be found in the manaing authority tab.

3.5.3 Partners

Manage project summary

| Project information | Managing authority | Partners | Personnelist | Purchases |

Partners

Provide contact and auditor information for each partner.

Name ▲	Type	Contact person	Position	Email	Auditor	Edit
Puolangan sienestäjät ry	Lead Partner	Sieni Jaakko	Sohvaperuna	email@email.com	Pottumaa	✏

Page size : 20 ▼   Records 1 to 1 of (1) | 1 |

« Previous   » Next

In partners view, contact and auditor information for each partner can be maintained.

Click Edit sign in the view. Contact information view is opened in partners tab.

Update/provide following partner information:
- Contact person
- Position
- Telephone number
- Email
- Auditing company
- Contact information of the auditor

Press Save button to save the done changes and updates.

System informs that Lead partners updates succesfully. Press Ok.

3.5.4 Personnel list (NOT obligatory to use)

| Project information | Managing authority | Partners | Personnel list | Purchases |

Personnel list

+ Add new

List all the employees of the project

Name	Position	Edit	Delete	View
No record found.				

Name	
Organization	
Position	
Tasks in the project	
Start date in the project	
End date in the project	

◉ Full-time   ○ Part-time

Add   **Reset**

Persons working with the project can be added to the personnel list.

Provide the following details:

- Name
- Organization
- Position
- Tasks in the project
- Start date in the project
- End date in the project
- Allocation: select Full-time or Part -time

Press Add push button and added person is visible in the personnel list.

Personnel list

+ Add new Personnel list

List all the employees of the project

Name	Position	Edit	Delete	View
Sami	Ingeneör	✎	🗑	🔍

« Previous   » Next

Person details can be edited, viewed and deleted via this functionality.

3.5.5   Purchases (NOT obligatory to use)

The details of the purchases for the project can be provided via Purchases functionality.

Press Add new purchases push button.

New window opens. Provide the details of the purchase:

- Item
- Purchaser
- Supplier
- Value in original currency
- Date
- Method of tender

Also purchase related attachments can be added to the purchase.

Browse the file that you want to attach to the purchase. Press Upload. System informs that file has been uploaded successfully.
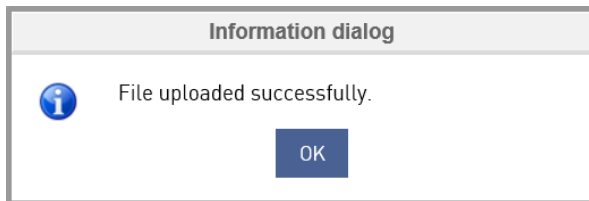
Attached file is now visible in the annexes.

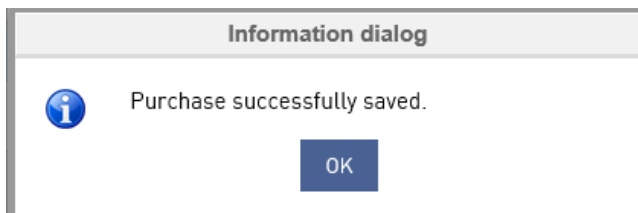Press Save push button to save purchase details.

System informs that Purchase successfully saved.

Added purchase item is visible the purchase list.

<mark>**4.   Recoveries**</mark>