

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
1.09	29.10.2019	T.Nurmi	Minor updates	Minor updates to partner request chapters
1.10	2.3.2020	T.Nurmi	New chapter	Chapter 4: Recovery order 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.

HomeSupportUser rightsProject management

Payments

Search

Date

Type of the payment request

Payment request status

SearchReset

+ Add new

Delete selected

<input type="checkbox"/>	Project name	Date ▾	Status	Type of the payment request	Payment request	Edit	Payment order	Delete
<input checked="" type="checkbox"/>	Sadesienā	09/10/2017	Draft	First pre-financing payment				
<input type="checkbox"/>	Sadesienā	05/10/2017	Submitted	First pre-financing payment				
<input type="checkbox"/>	Sadesienā	04/10/2017	Submitted	First pre-financing payment				
<input type="checkbox"/>	Sadesienā	04/10/2017	Submitted	First pre-financing payment				
<input type="checkbox"/>	Sadesienā	29/09/2017	Approved	First pre-financing payment				

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:

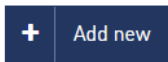
1. **Date.** Calendar selection for the date of the payment request submission date
2. **Type of payment request.** Dropdown list {First pre-financing payment, Interim payment, Final payment}
3. **Payment request status** = Dropdown list
 - **Draft.** Project partner has started to work with the payment 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 execute the search. Reset push button clears the given search criteria.

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 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

Back

Fields marked with asterisk (*) are mandatory.

Basic information

Name of the project: Sadesienia
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 sienestajat 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 *

Requested amount * €

- Interim payment/Final payment

Type of the payment request *

Start date of the reporting period *

End date of the reporting period *

Requested amount * €

Verified expenditure * €

- 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

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

Position

Date

Attachments

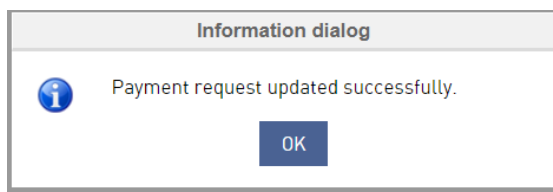
Attachment file

File Name	Download	Delete
OK.docx		

- Project partners name
- Position
- Date

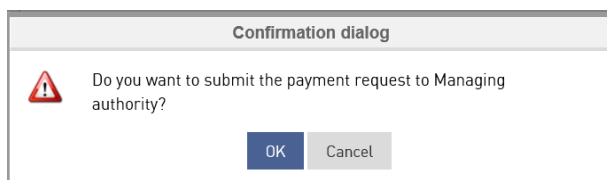
Project partner can also add attachments to the payment request.

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.

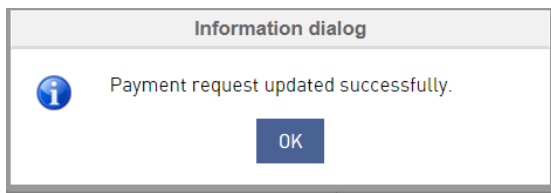


Once the payment request is ready, project partner can submit by Submit push button.

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

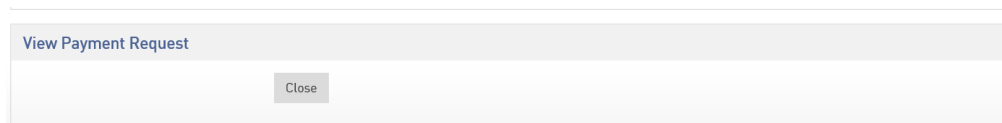


System confirms that payment request has been submitted succesfully and takes the project partner to the payments page.



1.4 View payment request

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



By Close push button to return back to Payments page.

1.5 Edit payment request

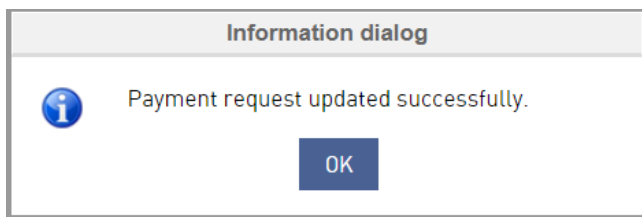
Choose Project Management > Payments. Click on the Edit icon of the payment request that you want to edit.

<input type="checkbox"/>	Project name	Date	Status ▲	Type of the payment request	Payment request	Edit	Payment order	Delete
<input type="checkbox"/>	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.



1.6 View payment order

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

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

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 Korvasienenuja 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	€

Ineligible 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 Account 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

Funding paid outside of the programme region

Outside programme area funding

0

€

Date of the payment order

09/10/2017

Payment date

09/10/2017

Payment order status

Approved

Signature

t0PI

nURMI

Close

Attachment details

File name	Download
OK.docx	

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.

Payments

Search

Add new

Delete selected

<input type="checkbox"/>	Project name	Date	Status	Type of the payment request	Payment request	Edit	Payment order	Delete
<input type="checkbox"/>	Hawk hunting	02/06/2017	Draft	Interim payment				

System ask to confirm the deletion

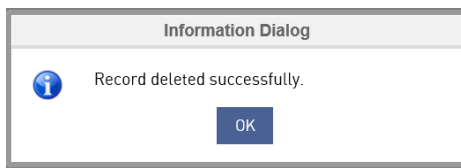
Confirmation Dialog

Are you sure want to delete the record?

OK

Cancel

and confirms the deletion.



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

<input type="checkbox"/>	Report type	Start date of the reporting period ▲	End date of the reporting period	Status	Submitted date	View	Edit	Delete
<input type="checkbox"/>	Project update	21/09/2017	21/09/2017	Pending				

Page size : 20 Records 1 to 1 of (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.

The screenshot shows the 'Project update' form. At the top, there is a header bar with the title 'Project update' and a 'Back' button. Below the header, there are three tabs: 'Basic information' (selected), 'Project progress', and 'Annexes'. The 'Basic information' tab contains a form with the following fields:

Name of the lead partner	Puolangan sienestäjät ry
Name of the project	Sadesieniä
Project ID	AMush1000
Partners	Puolangan sienestäjät ry
Start date of the project	
End date of the project	
Start date of the reporting period	
End date of the reporting period	

At the bottom right of the form, there is a 'Save & Next' button.

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

Basic information	Project progress	Annexes
Project progress		
2.1 Progress of the implemented activities in relation to all project activities [%]:	<input type="text" value="15,40"/>	
2.2 Level of incurred expenditure in relation to the total budget [%]:	<input type="text" value="20,50"/>	
2.3 Has the project been able to follow the indicative work plan? If no, why?	<div></div>	
2.4 Is there need to change the work plan? If yes, describe the needed changes.	<div></div>	
2.5 Description of the progress of the project:	<div> <div> </div> <div> B <i>I</i> <u>U</u> S </div> <div> <div>Styles ▾</div> <div>Normal ▾</div> <div>Font ▾</div> <div>Size ▾</div> </div> </div> <div> </div>	

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

Basic informationProject progressAnnexes

Annexes

Upload and name the annexes

Annexes

Description *

Attachment file *

Upload

Reset

Annexes:

File name	Description	Download	Delete
OK.docx	ok		

Contact information

Filled in by

Date

Contact person name

Email

Telephone

Previous

Save as Draft

Submit

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.

Confirmation Dialog

Are you sure you want to submit this project update

OK

Cancel

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

Information Dialog

Report submitted successfully.

OK

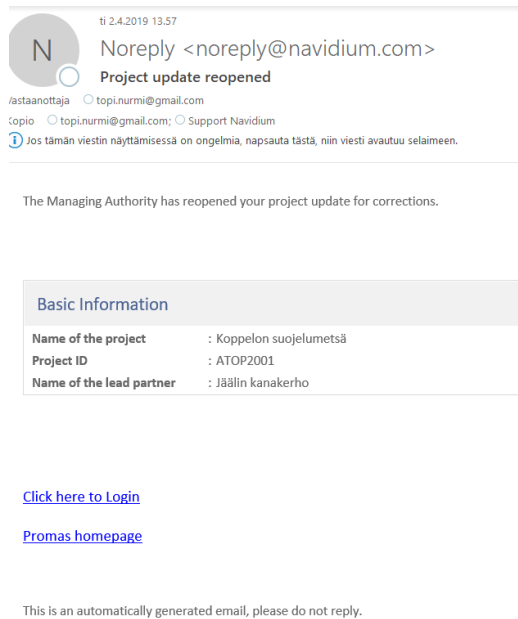
PROMAS-Phase 2 - Project partner instructions_ v.1.100

© 2017

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.

Manage project reports

☐ Project update ☐ Final report ☐ Interim report

+ Add new

Delete selected

<input type="checkbox"/>	Report type	Start date of the reporting period ▲	End date of the reporting period	Status	Submitted date	View	Edit	Delete
	Project update			Reopened	02/04/2019	🔍		
Page size : 20 ▼ Records 1 to 1 of {1}								

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

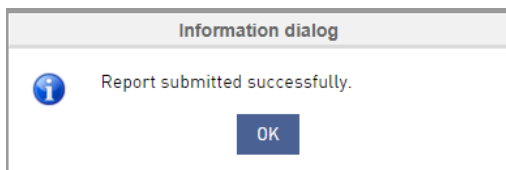
Confirmation dialog

Are you sure you want to submit this project update

OK

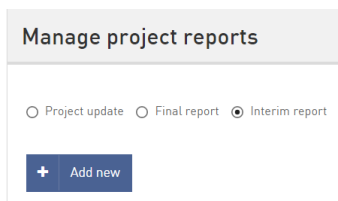
Cancel

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.

A screenshot of the 'Interim report' form. The title 'Interim report' is at the top left, and there are 'Print PDF' and 'Back' buttons at the top right. Below the title is a tabbed interface with tabs: 'Basic information', 'Summary', 'Work plan', 'Indicators', 'Communication and visibility', 'Annexes', and 'Signature'. The 'Basic information' tab is active. It contains several input fields with labels and values: 'Name of the lead partner' (Jäälän kanakerho), 'Name of the project' (Koppelon suojelumetsä), 'Project ID' (ATOP2001), 'Partners' (Jäälän kanakerho), 'Start date of the project' (02/04/2019), 'End date of the project' (30/05/2019), 'Start date of the reporting period' (02/04/2019), and 'End date of the reporting period' (11/04/2019). At the bottom right, there is a blue button with a right arrow and the text 'Save & Next'. At the bottom left, there is a small link '/Settings'.

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

Interim report

Back

Basic information Summary Work plan Indicators Communication and visibility Annexes Signature

Summary

Description of the implemented projet activities, financial situation, addressed challenges and cooperation between partners during the reporting period.

Rich text editor toolbar: Bold, Italic, Underline, Strikethrough, Bulleted list, Numbered list, Link, Unlink, Indent, Outdent, Text color.

Previous Save & Next

In the summary section of the interim report, project partner can add free text to describe the implemented project 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														
				Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
<div><div><div></div><div>Sadesienia</div></div><div>2017-09-13</div><div>99</div><div>+</div></div>			<div><div>Task: Kartan jakeli</div><div>Duration: 9 Day(s)</div><div>Status of the activity: To_do</div></div>															
<div><div><div></div><div>Sienikartta</div></div><div>2017-09-13</div><div>8</div><div>x</div></div>																		
<div><div><div></div><div>Kartan jakeli</div></div><div>2017-09-20</div><div>9</div><div>x</div></div>																		
<div><div><div></div><div>Sienien keruu</div></div><div>2017-10-19</div><div>63</div><div>x</div></div>																		

Sadesienia

Sienikartta

Kartan jakeli

Sienien keruu

Sadesienia

Sienien keruu

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

Add activity

Name of the activity * Sienien keruu

Description

Status of the activity To do

Estimated start date * 19/10/2017

Estimated end date * 20/12/2017

Activity order * 3

Responsible partner Select
Puolangan sienestajat ry

Accountable partner Select

Consulted partner Select
Puolangan sienestajat ry

Informed partner Select
Puolangan sienestajat ry

Location x Finland-Lapland x Russia-West Russia

Output

Save Cancel Delete

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

Interim report

Back

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

Indicators

Provide cumulative information of realised indicators.

Thematic indicators

Indicator	Target value	Realised cumulative value
Mushroom utilization improved and therefore local people are employed	50.00	0
Sales channels established for cross border mushroom trade	50.00	0

Project specific indicators

Indicator	Target value	Realised cumulative value
	0.00	0

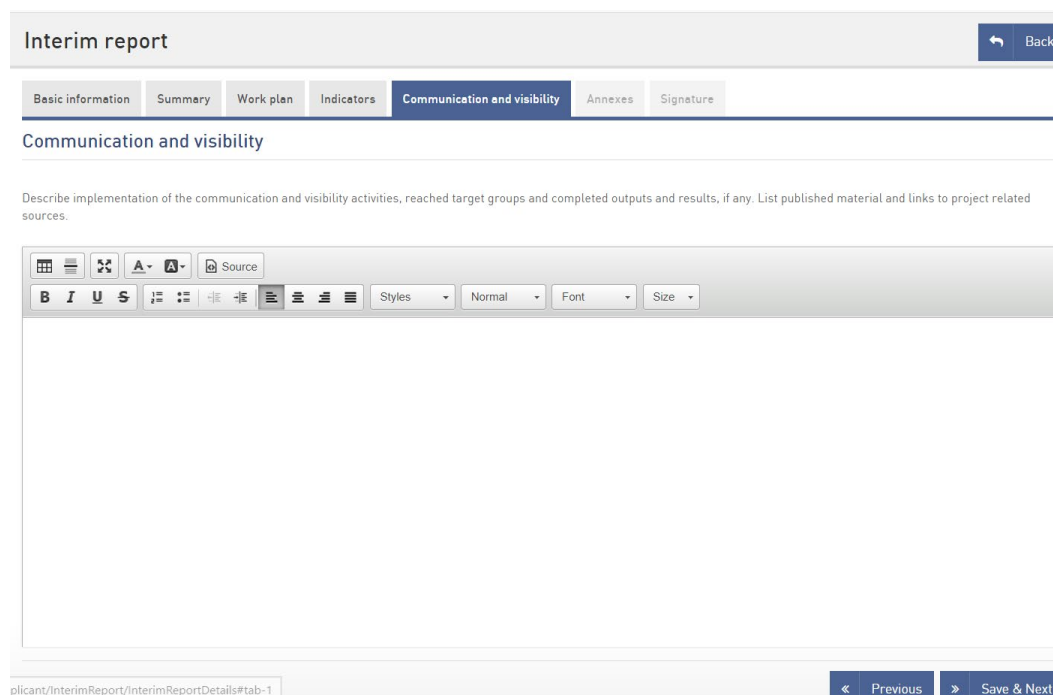
Previous Save & Next



In indicators part of the Interim report, project partner is expected to provide realized 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



The screenshot displays the 'Interim report' interface. At the top, there is a header bar with the title 'Interim report' and a 'Back' button. Below this is a navigation bar with tabs: 'Basic information', 'Summary', 'Work plan', 'Indicators', 'Communication and visibility' (which is the active tab), 'Annexes', and 'Signature'. The main content area is titled 'Communication and visibility' and contains a text editor. The text editor has a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, indent, outdent, decrease indent, increase indent) and a 'Source' button. Below the toolbar is a large text area for input. At the bottom of the interface, there is a footer bar with a URL 'plicant/InterimReport/InterimReportDetails#tab-1' and two buttons: 'Previous' and 'Save & Next'.

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 signature tab 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

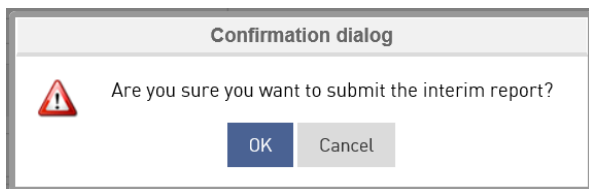
In signature section of the interim report, project partner must provide contact person details:

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

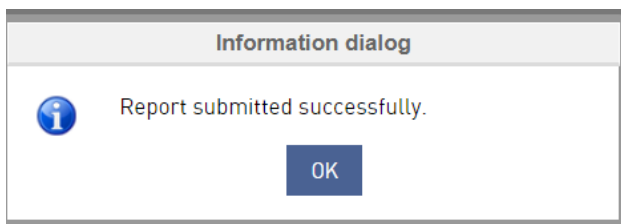
Project partner must also sign the interim report by providing:

- 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

 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

<input type="checkbox"/>	Report type	Start date of the reporting period ▲	End date of the reporting period	Status	Submitted date	View	Edit	Delete
<input type="checkbox"/>	Project update	27/08/2018	30/08/2018	Approved	27/08/2018			
<input type="checkbox"/>	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.

View interim report

Comments Print PDF Back

Basic information Summary Work plan Indicators Communication and visibility Annexes Signature

Basic information

Name of the lead partner Topi1

Name of the project Topi yksivaihteinen

Project ID AATN1000

Partners Topi1

Start date of the project 27/08/2018

End date of the project 27/09/2018

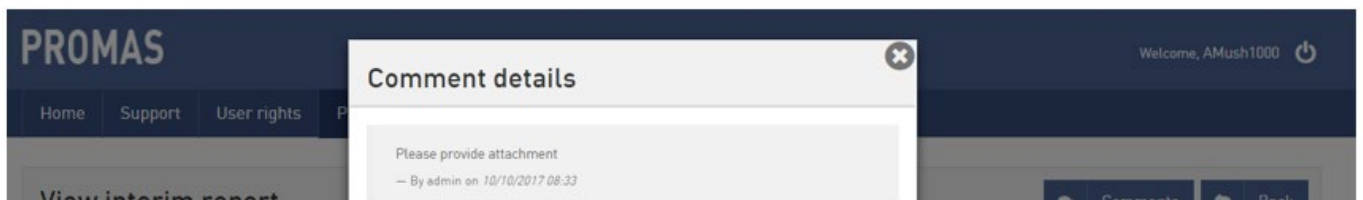
Start date of the reporting period 28/08/2018

End date of the reporting period 29/08/2018

» Save & Next

/Settings

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.

Manage project reports

☐ Project update ☒ Final report ☐ Interim report

+ Add new

Add final report view opens.

Add final report

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

Basic information

Name of the lead partner	Jäälän kanakerho
Name of the project	Koppelon suojelumetsä
Project ID	ATOP2001
Partners	Jäälän 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
- Assessment 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 project
- 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.

Add final report

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

Indicators

Thematic indicators

Thematic indicator	Target value	Realised value
Topi2 Thematic indicator	25.00	<input type="text" value="0"/>

Project specific indicators

Indicator	Target value	Realised value
own	100.00	<input type="text" value="0"/>

Previous

Save & Next

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

[illegible]

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

[illegible]

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

The screenshot shows the 'Edit final report' interface. At the top, there's a header bar with the title 'Edit final report' and buttons for 'Comments', 'Print PDF', and 'Back'. Below this is a navigation bar with tabs: 'Basic information', 'Activities', 'Indicators', 'Results', 'Impact', 'Monitoring and evaluation' (which is highlighted), 'Environmental impact', and 'Communication and visibility'. Under the 'Monitoring and evaluation' tab, there are sub-tabs: 'Assessment of project administration', 'Assessment of the programme', and 'Annexes'. The main content area is titled 'Monitoring and evaluation' and contains a question: '5.1. Describe the monitoring and evaluation arrangements; how the project implementation and achieving of the results were monitored and evaluated?'. Below the question is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, indent, outdent, and text color. There are also dropdown menus for 'Styles' (set to 'Normal'), 'Font', and 'Size'. The text area is currently empty with a cursor at the top left.

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? Analyse 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

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

Communication and visibility

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

A rich text editor toolbar with icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, indent, outdent, decrease indent, increase indent, styles, normal, font color, and size.

|

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

Project partner is 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

Edit 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

Assessment of project administration

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

B I U S

Styles Normal Font Size

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

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

Assessment of the programme

9.1. Assess the CBC programme as a financing instrument

A - A -

Source

B I U S

Styles

Normal

Font

Size

Project partner is 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										
<div> <div>Annexes</div> <div> <div> <div>Description *</div> <div></div> </div> <div> <div>Attachment file *</div> <div></div> <div>Browse</div> </div> <div> <div>Upload</div> <div>Reset</div> </div> <div> <div>Annexes</div> <table border="1"> <thead> <tr> <th>File name</th> <th>Description</th> <th>Download</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td colspan="4">No record found.</td> </tr> </tbody> </table> </div> </div> </div>			File name	Description	Download	Delete	No record found.			
File name	Description	Download	Delete							
No record found.										
Contact information										
<div> <div>Filled in by</div> <div>Jäälin kanakerho</div> <div>Date</div> <div>04/04/2019</div> <div>Name of the contact person</div> <div></div> <div>Email</div> <div></div> <div>Telephone</div> <div></div> </div>										
Signature										
<div> <div>Name</div> <div></div> <div>Position</div> <div></div> <div>Date</div> <div></div> <div>Signature</div> <div></div> </div>										
<div> <div>Previous</div> <div>Save as Draft</div> <div>Submit</div> </div>										

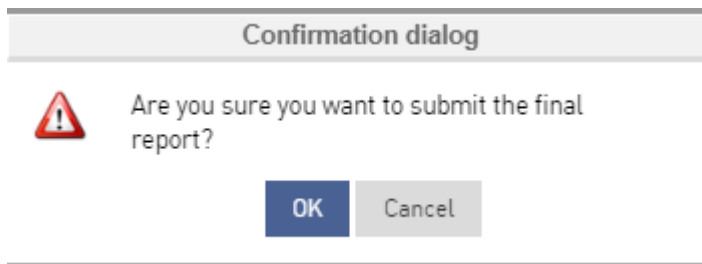
In signature section of the Final report, project partner must provide contact person details:

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

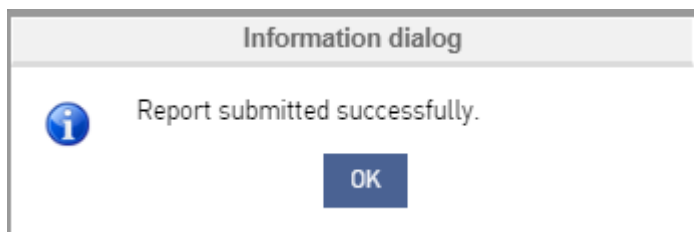
Project partner must also sign the Final report by providing:

- 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.



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



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.

pe 7.6.2019 7:47

Noreply

PROMAS - Final Report reopened

Vastaanottaja: Topi Nurmii

Kopio: Topi Nurmii; Support Navidium

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

The Managing Authority has reopened your final report for corrections.

Basic Information

Name of the project : Sienimetsä
Project ID : ATOP1000
Name of the lead partner : Stringreel

[Click here to Login](#)

[Promas homepage](#)

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

In the manage project reports, status of the Final 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

<input type="checkbox"/>	Report type	Start date of the reporting period ▲	End date of the reporting period	Status	Submitted date	View	Edit	Delete
<input type="checkbox"/>	Final report			Reopened	04/04/2019			

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

Final report view opens.

PROMAS

Welcome, ATOP2001

Home Support User rights P

Edit final report

Comment details

Please check the indicators
— By admin on 04/04/2019 13:47

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

Basic information

Name of the lead partner Jäälän kanakerho

Name of the project Koppelon suojelumetsä

Project ID ATOP2001

Partners Jäälän kanakerho

Start date of the project 12/03/2019

End date of the project 25/04/2019

Save & Next

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

Home Support User rights **Project management** Documents

Payments

Requests for change

Addendum

Recoveries

Memorandum

Project summary

Project reports

Payment request

Call for proposal name: Topi's two phase tr

Project name: Koppelon suojelumetsä

Applicant name:

Receipt number: PR000101

Call for Project i

Applicar

Order n

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.

Requests for change						
<div> <div>+ Add new</div> <div>Delete selected</div> </div>						
<input type="checkbox"/>	Project ID	Submission date	Change request status	Edit/Add File	Delete	View
	AMush1000	26/09/2017	Submitted			
<input type="checkbox"/>	AMush1000	26/09/2017	Draft			
Page size : <input type="text" value="20"/> Records 1 to 2 of (2)						1

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.

Request for change		Back
<div>Project basic information</div> <div> <p>Name of the lead partner: Puolangan sienestäjät ry</p> <p>Name of the project: Sadesieninä</p> <p>Project ID: AMush1000</p> <p>Priority: Mushroom know how</p> <p>Implementation period of the project: 19/10/2017 - 27/10/2017 (0 Months)</p> </div>		

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 *

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

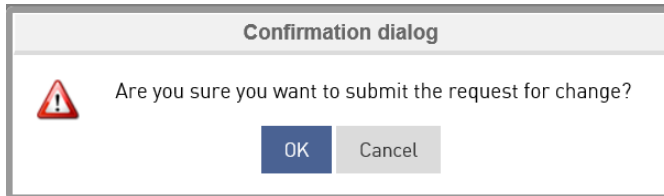
Annexes

Attachment file

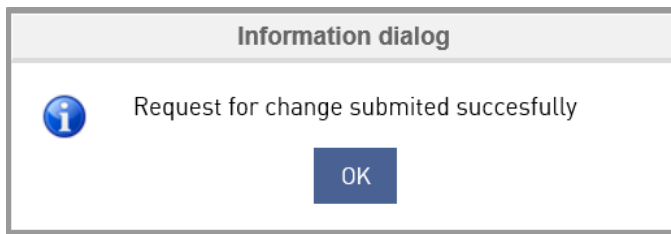
File name	Download	Delete
No files uploaded.		

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.

Requests for change						
<div> <div>+ Add new</div> <div>Delete selected</div> </div>						
<input type="checkbox"/>	Project ID	Date	Request for change status	Edit/Add File	Delete	View
	Amush2000	26/03/2018	Approved			
<div> <div>Page size : 20 </div> <div>Records 1 to 1 of [1]</div> <div>1</div> </div>						

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.

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	Status ▾	Type	Active	Add/Edit information	View
Partner request to be rejected 14.10.2019	Russia	Rejected	Partner	Inactive		Q
Add partner_5 15.10.2019		Submitted	Partner	Inactive		Q
UUSI 2 22.10.2019		Approved	Partner	Inactive		Q
Partner to be added 14.10.2019	Sweden	Approved	Partner	Active		Q

In the Requests for partner change result view, the details are displayed as follows:

- Partner name
- Country
- Status (request status: draft, submitted, rejected and approved)
- Partner type
- Partner status (Inactive, Active)
- Add/Edit information (for requests with status Draft)
- 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

TypePartner

Full legal name

Name of the organisation in original language

CountrySelect

RegionSelect

Department/ unit in charge of the activities

Business ID

Legal statusPublic

Type of organisationSelect

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 Partner:

- Type (default from the system)
- Full legal name
- Name of the organization in original language
- Country

- Region
- Department/unit in charge of the activities
- Business ID
- Legal status (Selection; Public or Private)
- Type of the organization (Selection from the list)
- Description of the organization
- Official address
- Postal address
- Telephone number
- Email of the organization
- Website of the organization

Continue with providing contact person details:

Contact person	
Name	<input type="text" value="Topi Nurmi"/>
Position	<input type="text" value="Sienivastaava"/>
Telephone number	<input type="text"/>
Email	<input type="text"/>

Fill the Motivation and Capacity sections:

Motivation
What is the role of the partner in the project?
<input type="text"/>
Why does the organisation participate in the project (reason and motivation)?
<input type="text"/>
How does the organisation benefit from participating in the project?
<input type="text"/>
Operational capacity
What are the organisation's thematic competences and experiences relevant for the project?
<input type="text"/>
Describe the organisation's previous experience in participating in and/or managing EU co-financed projects or other international projects.
<input type="text"/>
In the case of partners from outside the programme's core area: What is the added value of this partner for the project?
<input type="text"/>

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
<input type="button" value="−"/> <input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="button" value="+"/>		

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

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 partner change?

OK

Cancel

Press OK.

Information dialog

Request for change submitted succesfully

OK

3.2.2 Request for removing an existing partner

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

The screenshot shows the 'Request for change' form. It has three main input sections: 'Date' with a text field, 'Change' with a dropdown menu currently showing 'Partners', and 'Partner' with a list box containing 'Lalun lelut' and 'Partnerin lisäys'. Below these is the 'Proposed change' section, which features a rich text editor with a toolbar (including bold, italic, underline, strikethrough, bulleted list, numbered list, link, unlink, indent, outdent, and source icons) and a large text area for the description.

Project partner must also provide:

- Grounds for the change
- Budget impacts

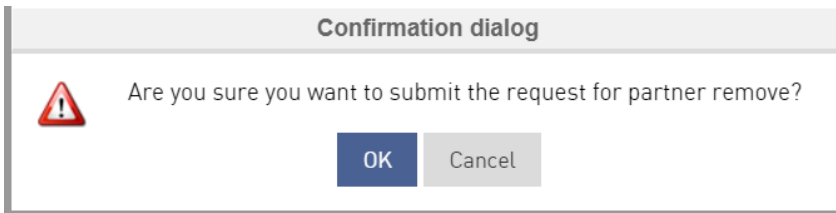
And details of the requestor:

- Organization
- Name
- Position

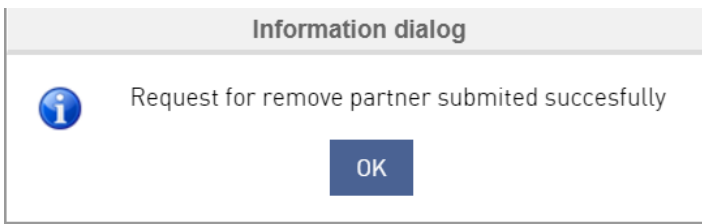
The screenshot shows the lower portion of the form. It includes two text areas for 'Grounds for the change' and 'Budget impacts'. Below these is the 'Requested by' section, which contains three text fields for 'Organization', 'Name', and 'Position'. The 'Annexes' section follows, featuring an 'Attachment file' input with a 'Browse' button, 'Upload' and 'Reset' buttons, and a table for managing uploaded files. The table has columns for 'File name', 'Download', and 'Delete'. Below the table, it says 'No files uploaded.' At the very bottom of the form are three buttons: 'Save as Draft', 'Submit', and 'Cancel'.

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 Removing the draft partner request

Partner requests with status Draft can be cancelled by removing the partner request from the Request for change view.

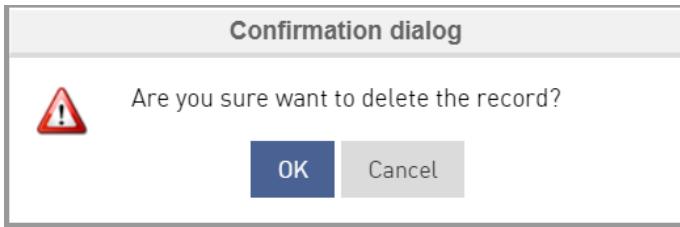
Request for partner change							
<div> <div>+ Add new</div> <div>To add a new partner, click Add new.</div> </div> <div> <div>- Remove</div> <div>To remove an existing partner, click remove button.</div> </div>							
Partner	Country	Status	Type	Active	Add/Edit information	View	
Partner to be added 14.10.2019	Sweden	Submitted	Partner	Active		Q	
Partner request to be rejected 14.10.2019	Russia	Rejected	Partner	Inactive		Q	
Partner to approved and the removed 14.10.2019	Finland	Approved	Partner	Inactive		Q	
Halkkynölkky	Finland		Partner	Active		Q	
Draft partner	Finland	Draft	Partner	Inactive		Q	

Request for change view:

Requests for change						
<div> <div>+ Add new</div> <div>Delete selected</div> </div>						
<input type="checkbox"/>	Project ID	Date	Request for change status	Edit/Add File	Delete	View
<input type="checkbox"/>	TOP2000	29/10/2019	Draft			

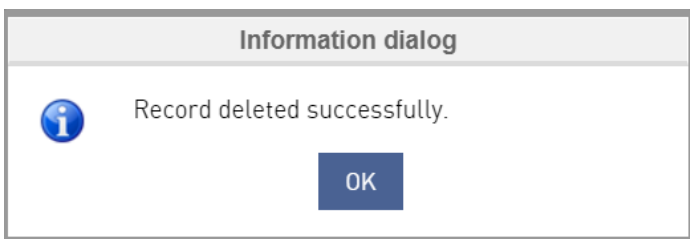
Request can be deleted by clicking Delete icon in the request row.

Promas asks to confirm the deletion:



Press OK.

Promas confirms the deletion.



3.2.4 Partner change request decisions by the authority

Request for partner change						
<div> <div>+</div> <div>Add new</div> <div>To add a new partner, click Add new.</div> </div> <div> <div>-</div> <div>Remove</div> <div>To remove an existing partner, click remove button.</div> </div>						
Partner	Country	Status ▾	Type	Active	Add/Edit information	View
Partner request to be rejected 14.10.2019	Russia	Rejected	Partner	Inactive		
Add partner_5 15.10.2019		Submitted	Partner	Inactive		
Partner to be added 14.10.2019	Sweden	Submitted	Partner	Active		
Jopo Mopo kolome		Submitted	Partner	Inactive		
UUSI 2 22.10.2019		Approved	Partner	Inactive		
Partner to approved and the removed 14.10.2019	Finland	Approved	Partner	Inactive		

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						
<div> <div>+ Add new</div> <div>Delete selected</div> </div>						
<input type="checkbox"/>	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			
<input type="checkbox"/>	ATOP1000	18/07/2019	Draft			
<div> <div>Page size : 20</div> <div>Records 1 to 10 of (10)</div> <div>1</div> </div>						

Also partner requests which has been saved as draft but not yet submitted are visible and editable and removable (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:

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.

Contract article details

Grant contract basics

Article 1

Article 2

Article 3

Article 4

Article 5

Article 6

Article 7

Article 8

Signature

Addendum

Upload Document

Change request number

CR000026

Change

Budget

Proposed change

More money

Grounds for the change

Empty pocket

Budget impacts

No money

Requested by

Organization

Lahjajavisoona

Name

Jaska Jokunen

Position

Ajattelijä

Change request details:

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


Addendum details:

- The following provision of the Grant Contract are replaced/completed as follows
- Date
- Attachments
- Signatures

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

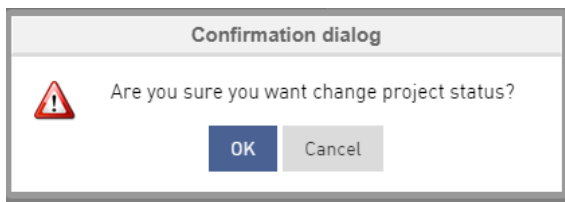
Description *

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

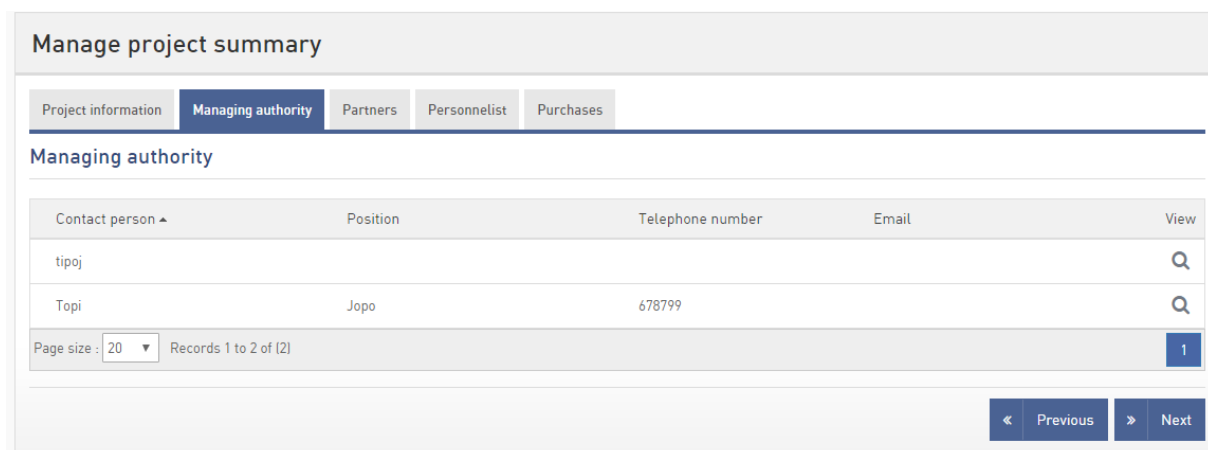


3.5.1 Project information

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

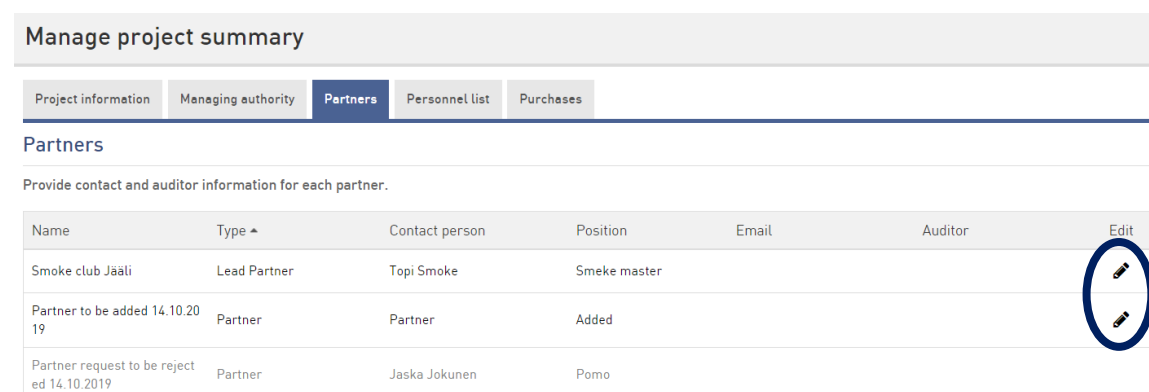
3.5.2 Managing authority



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

3.5.3 Partners

In the Partners view, active Partners are highlighted with black color and inactive partners are greyed out.



In partners view, following details can be maintained for the partners with status active.

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

Project information
Managing authority
Partners
Personnel list
Purchases

Partners

Provide contact and auditor information for each partner.

Name ^	Type	Contact person	Position	Email	Auditor	Edit
Karelia mushrooms	Lead Partner	Topi Nurmi	Sienipomo			

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

Contact information

Name: Karelia mushrooms
Type: Lead Partner
Contact person: Topi Nurmi
Position: Sienipomo
Telephone number: 05044444
Email:
Auditing company: Autits OYJ
Contact information of the auditor: Juppe Tarkastaja

Save
Cancel

Previous
Next

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.

Information dialog

Lead partner updated successfully.

OK

3.5.4 Personnel list

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

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

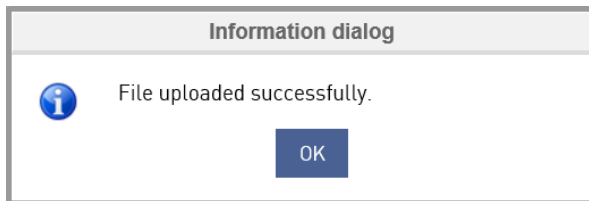
Press Add new purchases push button.

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.

Annexes

Attachment file * Browse Recommended maximum size is 15 Mb per file.

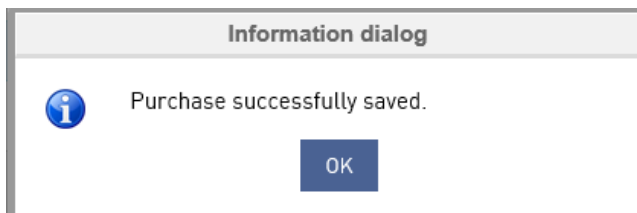
Upload Reset

Annexes:

File name	Download	Delete
Kalastustupa.pdf		

Press Save push button to save purchase details.

System informs that Purchase successfully saved.



Added purchase item is visible the purchase list.

Item ▲	Value in original currency	Date	Edit	Delete
Uistin	122	06/10/2017		
Page size : 20 ▼ Records 1 to 1 of {1} 1				

4. Recoveries

In case authority has created recovery order, lead partner can view recovery orders in Promas.

Go to Project management-> Recoveries. Manage recovery order page opens:

Manage recovery order

Search

Recovery order number

Start date

End date

☒ Pending
 ☐ Paid

Search

Reset

Project name ▲	Date	Recovery order number	Total costs of the project	Status	View
Topi test 17.10.2019	02/03/2020	R0000097	100,00	Pending	Q

Page size : 20

Records 1 to 1 of (1)

1

Following functionalities and information is displayed and available in the Manage recovery order page:

- Search functionality

Please note that project partner is able to find recovery order details only if authority has submitted the recovery order, otherwise there will not be any information available in the manage recovery order view. In case the recovery order has been submitted, following details of the recovery order are displayed as follows:

- Project name
- Date. Date when recovery order has been submitted
- Recovery order number
- Total cost of the project
- Status (Pending or Paid)
- View functionality

4.1 Search recovery orders

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

Search options are displayed

Manage recovery order

Search

Recovery order number

Start date

End date

☒ Pending
 ☐ Paid

Search

Reset

Available search options are:

- Recovery order number.
- Start date and End date (when recovery order has been submitted)
- Recovery order status = Pending (recovery amounts not fully paid) or Paid (recovery amounts fully paid)

Click Search push button to execute the search. Reset push button clears the given search criteria's.

Search result is displayed and is having same content that Manage recovery order page.

4.2 View recovery order

Manage recovery order					
<div> <div>+</div> <div>Search</div> </div>					
Project name ▲	Date	Recovery order number	Total costs of the project	Status	View
Topi test 17.10.2019	02/03/2020	R0000097	100,00	Pending	<div> <div>Q</div> <div>1</div> </div>
<div> <div>Page size :</div> <div>20</div> <div>Records 1 to 1 of (1)</div> </div>					

Click View sign of the recovery order. View recovery order page is opened.

View recovery order
<div>Basic information</div> <div> <div>Name of the project: Topi test 17.10.2019</div> <div>Project ID: TOP2001</div> <div>Name of the lead partner: Testing by Topi</div> <div>Postal address of the beneficiary: d</div> <div>Business ID: d</div> <div>Implementation period of the project: 17/10/2019 to 14/11/2019 (1 Months)</div> </div>

In the View recovery order view, the details of the project are displayed as follows:

Project basic information:

- Name of the Project
- Project ID
- Name of the lead partner
- Postal address of the beneficiary
- Business ID
- Implementation period of the project

Recovery order details:

Recovery order/ Debit note

Recovery order number R0000097

Date 02/03/2020

Legal grounds for recovery Topi test recovery order

Financial year of the cost 2020

Total costs of the project 100,00

Financier	Amount
European Union _ Topi	1,00
Finland _ Topi	2,00
Russia _ Topi	3,00
Sweden _ Topi	4,00
Total	10,00

Due date (within 45 days from receiving the request) 30/04/2020

Method of recovery email

Interest for delayed payment (%) 2,00

Justification Money awarded too much


Additional information second payment

Following information is visible:

- Recovery order number
- Date
- Legal grounds for recovery.
- Financial year of the cost
- Total cost of the project
- Amount to be recovered per financier (program financiers)
- Total amount to be recovered is automatically updated
- Due date for the recovery payment
- Method of recovery
- Interest for delayed payment (%)
- Justification
- Additional information

Signatures and attachments:

Signature			
Name	Topi Smith	John Nurmi	
Position	Manager	Director	
Date	02/03/2020	02/03/2020	

Attachment details	
Attachments	
File name	Download
Activity cannot be deleted.pdf	

Close

Click Download icon to download the attachment(s).

Return to the manage recovery order page by clicking the Close push button.