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

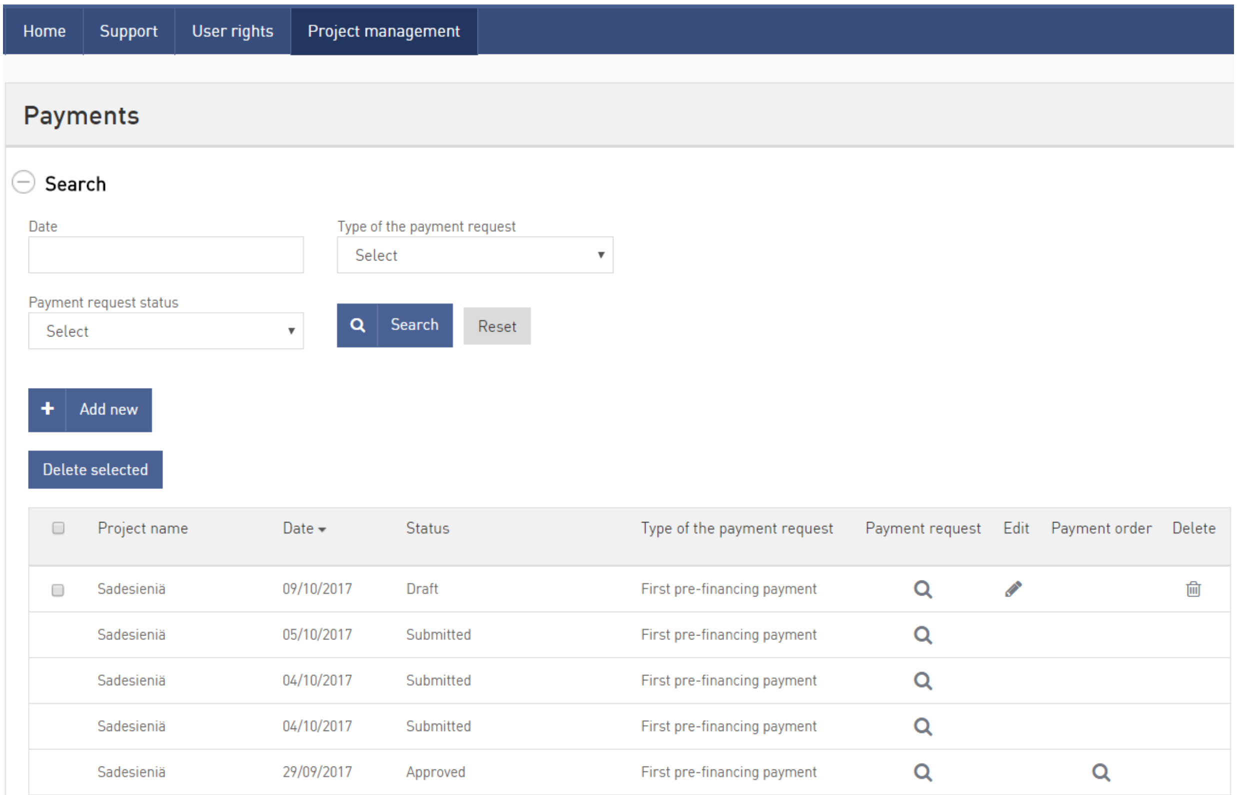
Project partner must supplement the payment request with corresponding reports that are described later in this user guide:

- 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.



	Project name	Date	Status	Type of the payment request	Payment request	Edit	Payment order	Delete
	Sadesieniä	09/10/2017	Draft	First pre-financing payment				
	Sadesieniä	05/10/2017	Submitted	First pre-financing payment				
	Sadesieniä	04/10/2017	Submitted	First pre-financing payment				
	Sadesieniä	04/10/2017	Submitted	First pre-financing payment				
	Sadesieniä	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)

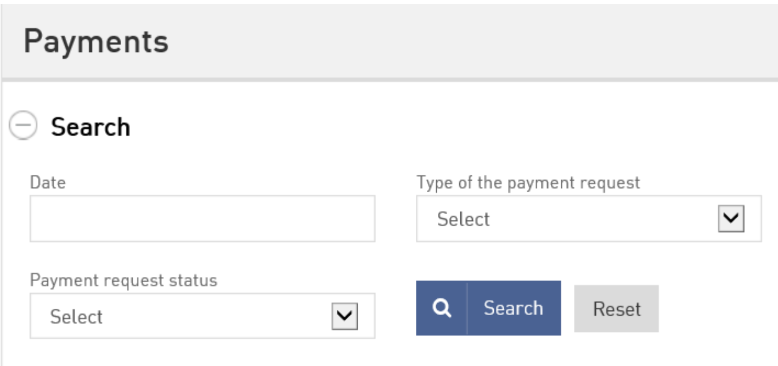
Please note that when project partner is accessing payments page first time there will not be any information available in the result view. After creating first payment request, the details of the payment request are displayed as follows:

- 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

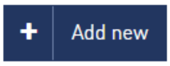
   - **Approved**. Payment request has been approved by Authority

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

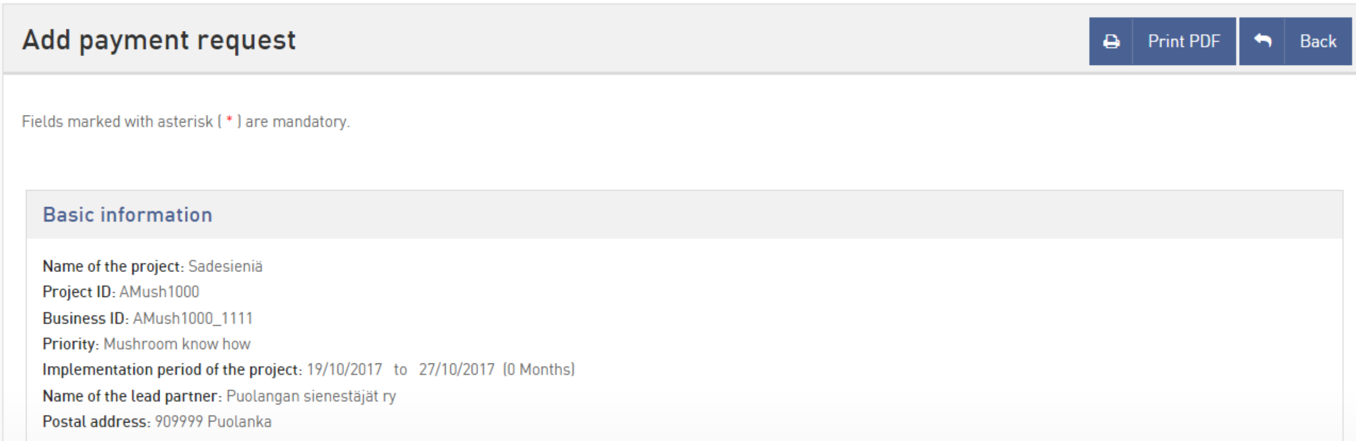
Search result is displayed and is having same content that Payments page.

1.3 Create payment request

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

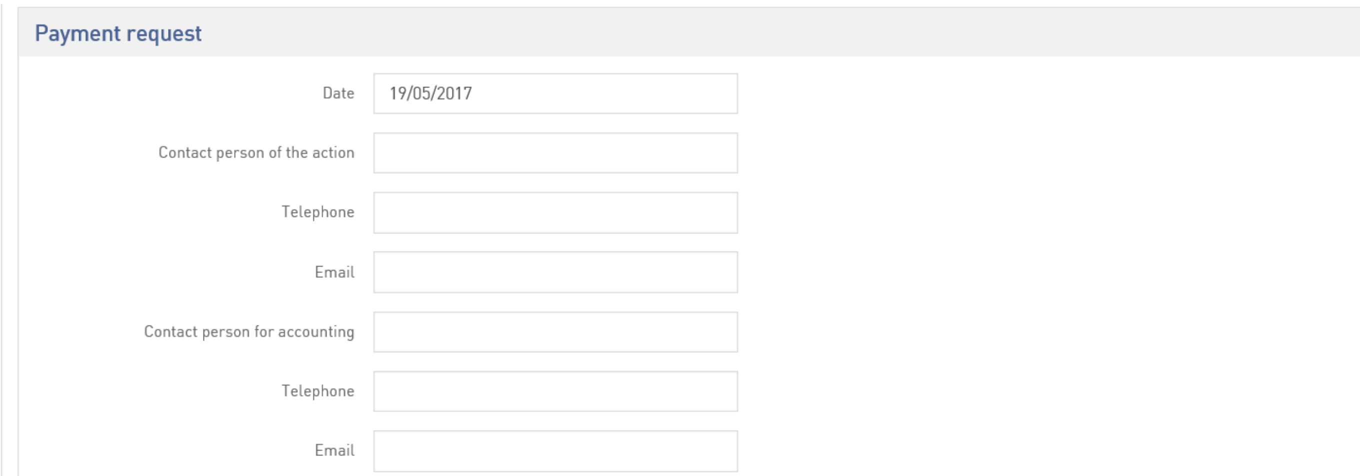


Add payment request page is opened. Add payment request page contains following information and input fields for the project partner to be filled for the payment request.



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



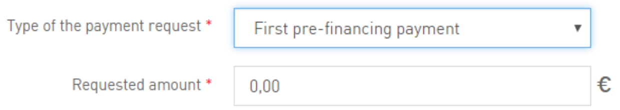
Following information is needed to provide for the payment request:

- Date. Calendar selection for the payment request date.
- Contact person of the action.
- Telephone.
- Email. Email check validation.

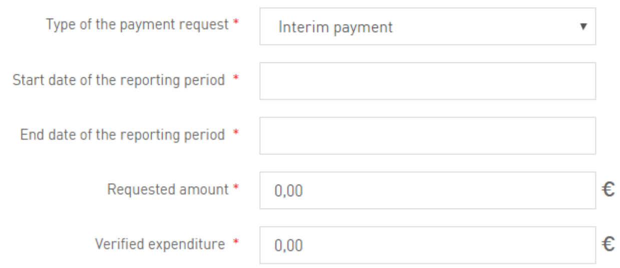
- Contact person for accounting.
- Telephone.
- Email. Email check validation.

Payment type selection:

- First pre-financing payment

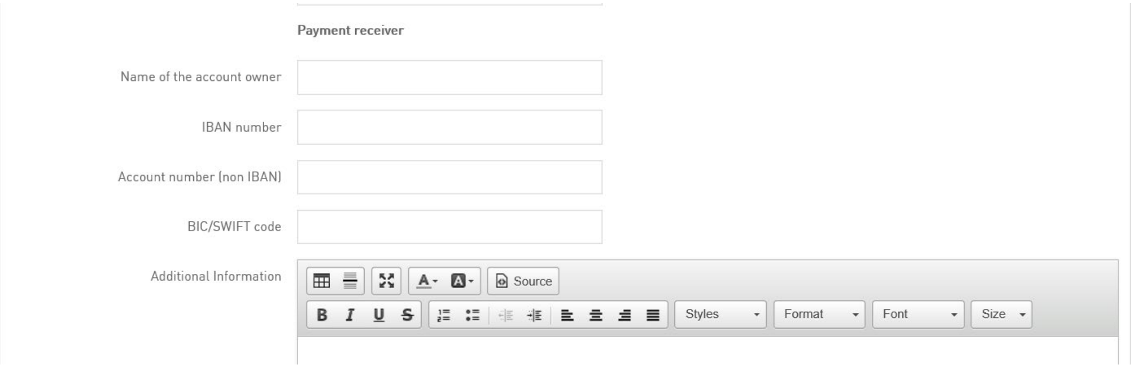


- Interim payment/Final payment



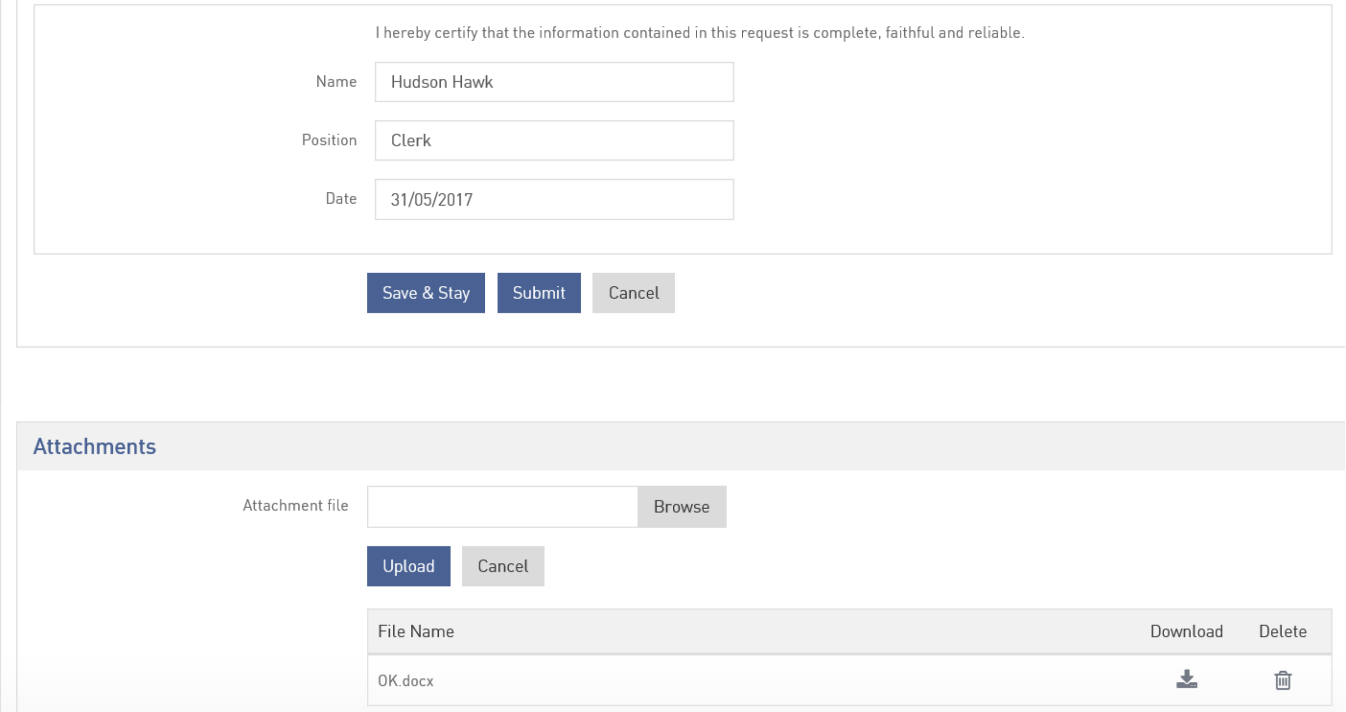
- Type of the payment request {First pre- financing payment, Interim payment, Final payment} Mandatory
- Start date of the reporting period.Calendar selection (mandatory). Not available with first pre-financing payment
- End date of the reporting period. Calendar selection (mandatory). Not available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

Provide payment receiver details:



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

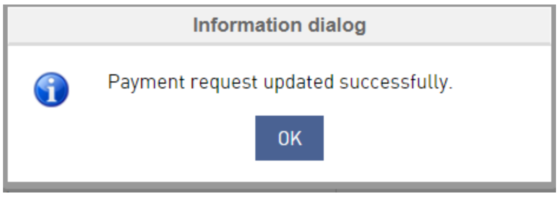
Signature and attachments:



- Project partners name
- Position
- Date

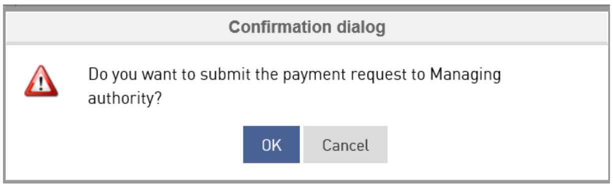
Project partner can also add attachments to the payment request.

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.

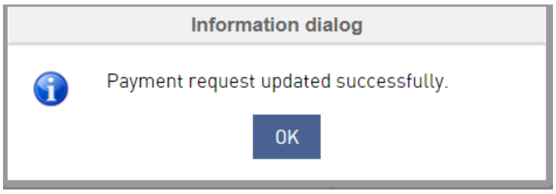


Once the payment request is ready, project partner can submit by Submit push button.

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

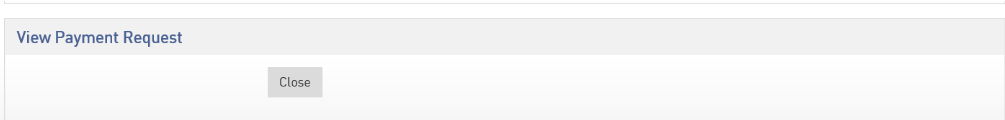


System confirms that payment request has been submitted succesfully and takes the project partner to the payments page.



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.

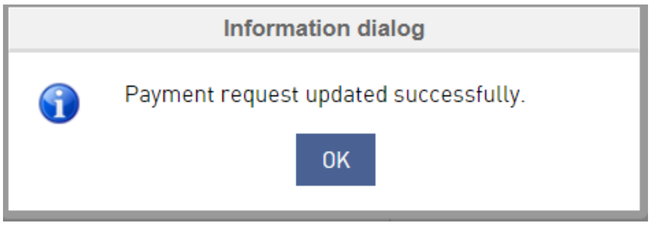
1.5 Edit payment request

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

Payment request page is opened for the editing.

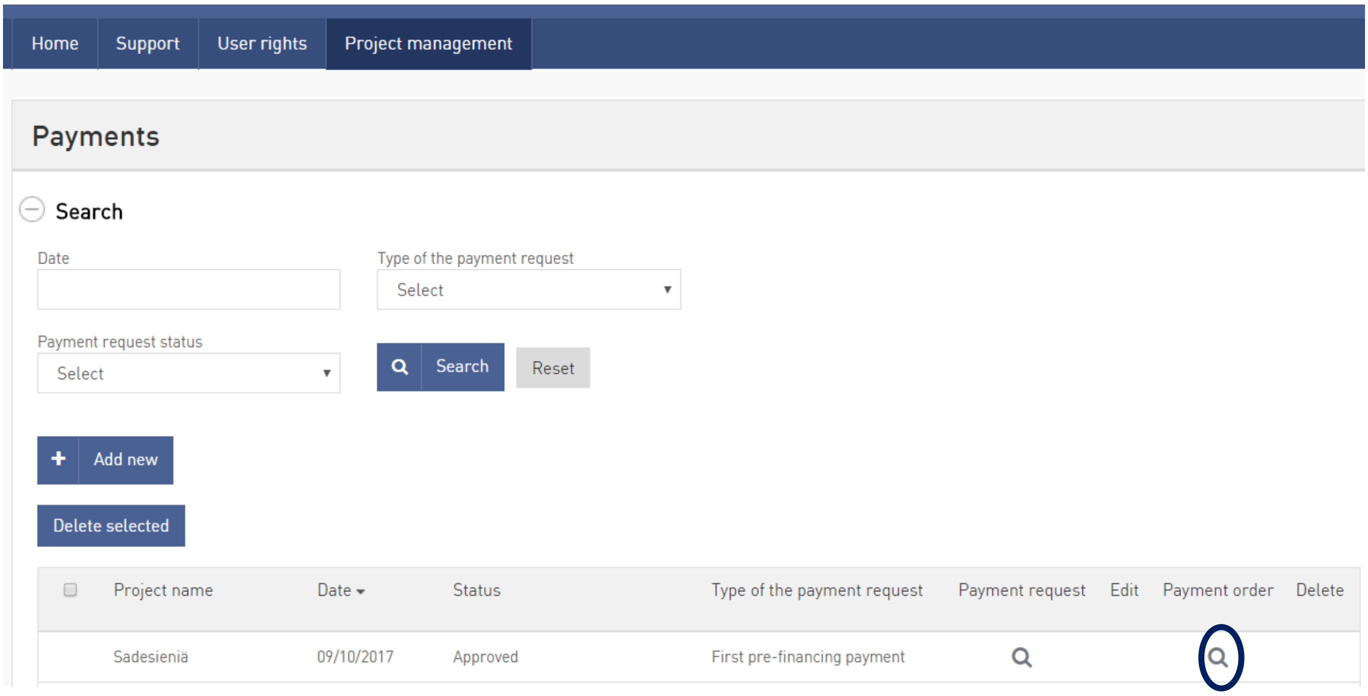
Edit the payment request and click Save push button.

A window confirms the update.

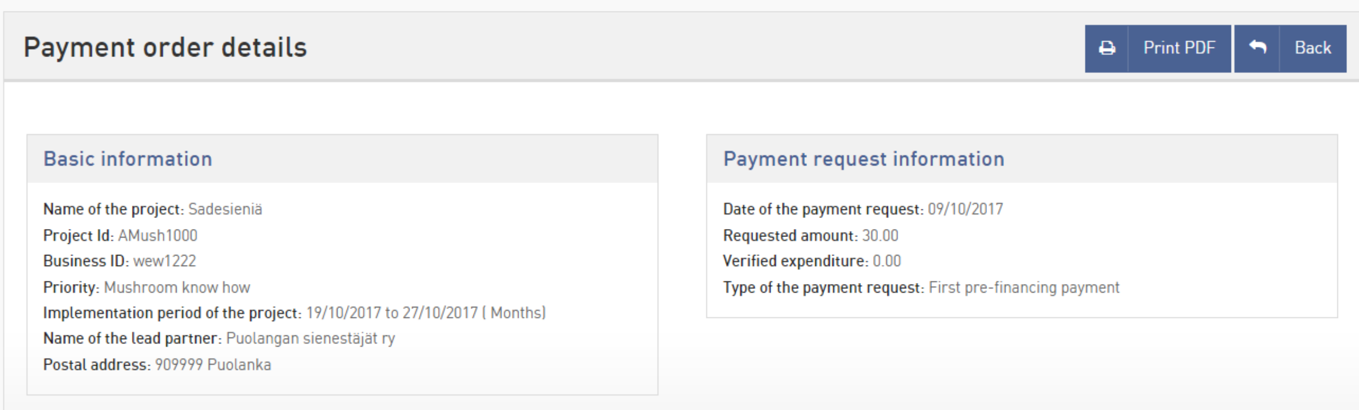


1.6 View payment order

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 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.

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.

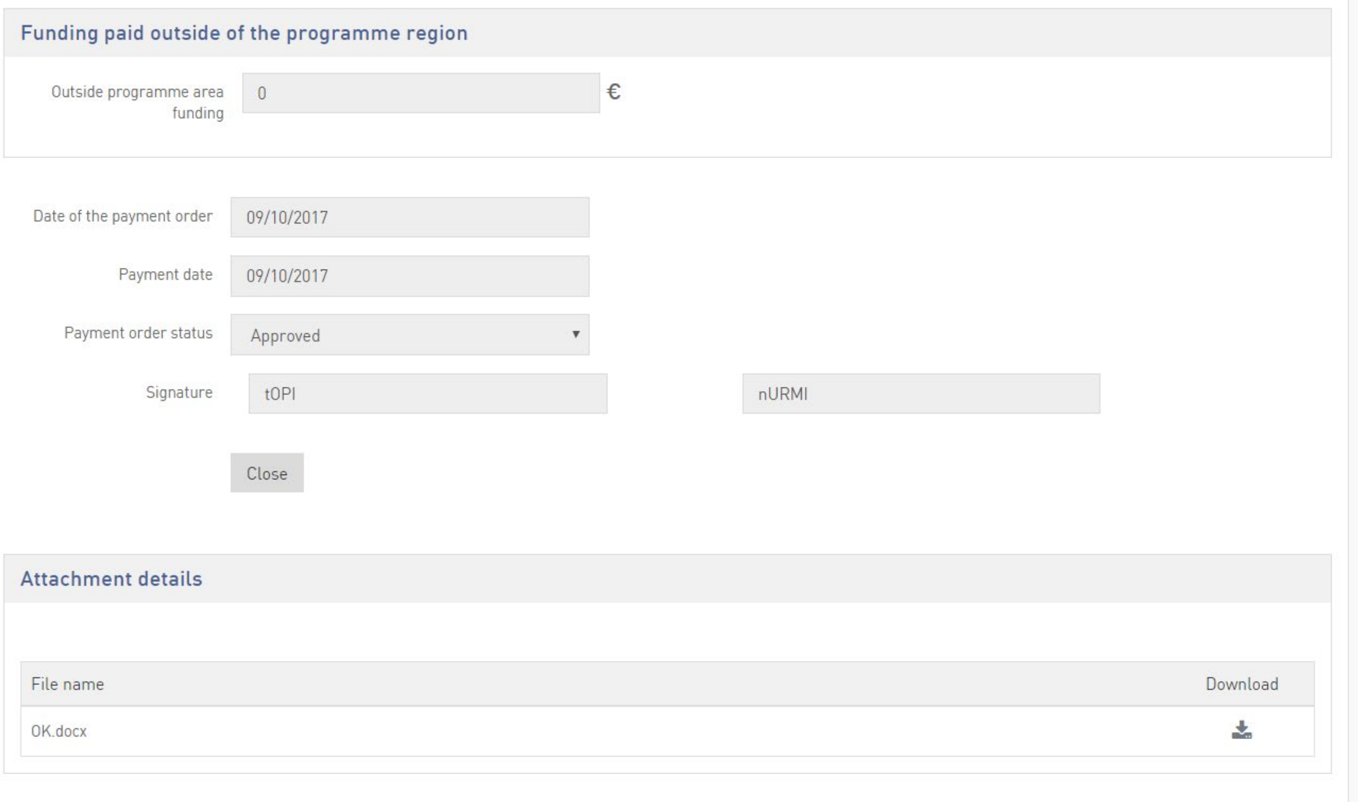
Decision on payment, TOTAL

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

Specification of the decision on payment

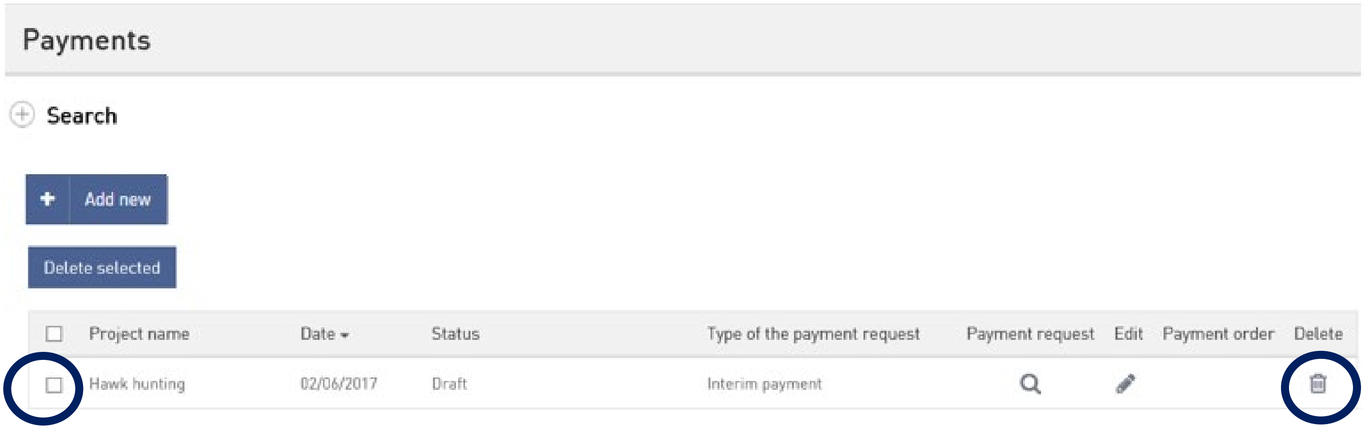
Name of the receiver	Topi
Bank Acount Number	11111
SWIFT	22222
FINLAND	100.00
Norway	100.00
Sweden	100.00
Russia	100.00
EU	100.00
Total	500
Additional information	Alles kyyd

Outside funding information, Payment approval details and Signatures

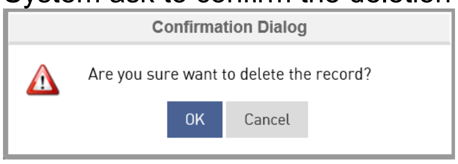


1.7 Delete payment request

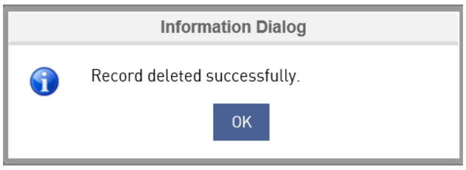
Choose Project management > Payments. Click on the Delete icon of the question that you want to delete or alternatively tick the tickbox front of the question and press Delete selected push button. Deletion can be done only requests with status draft.



System ask to confirm the deletion



and confirms the deletion.

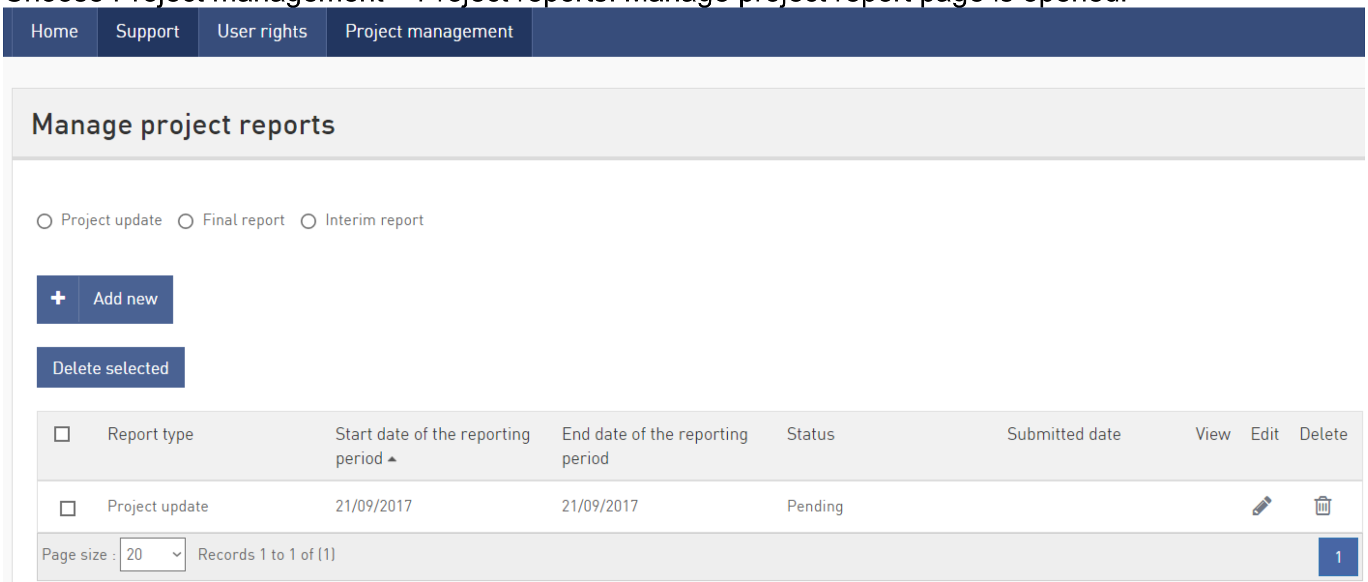


2. Manage project reports

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.



In this view Project partner can create following reports:

- Project update
- Final report
- Interim report

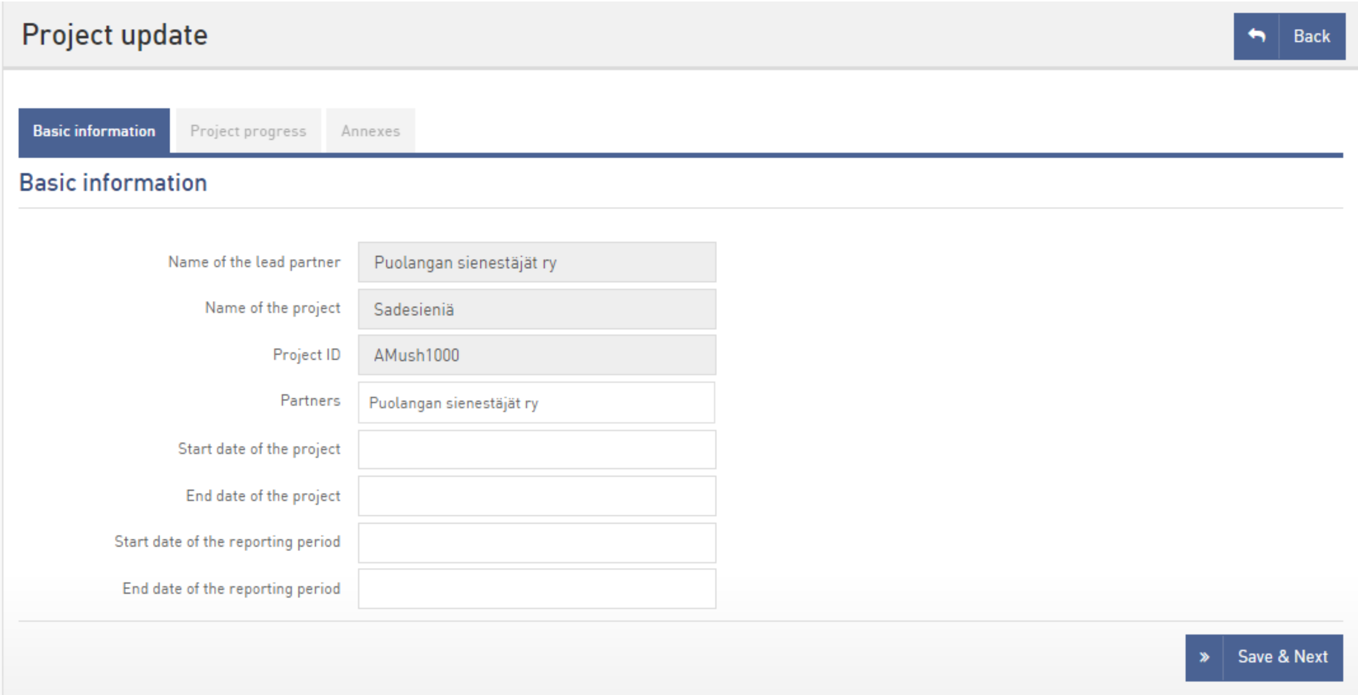
By selecting report type to be created and by pressing Add new push button.

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

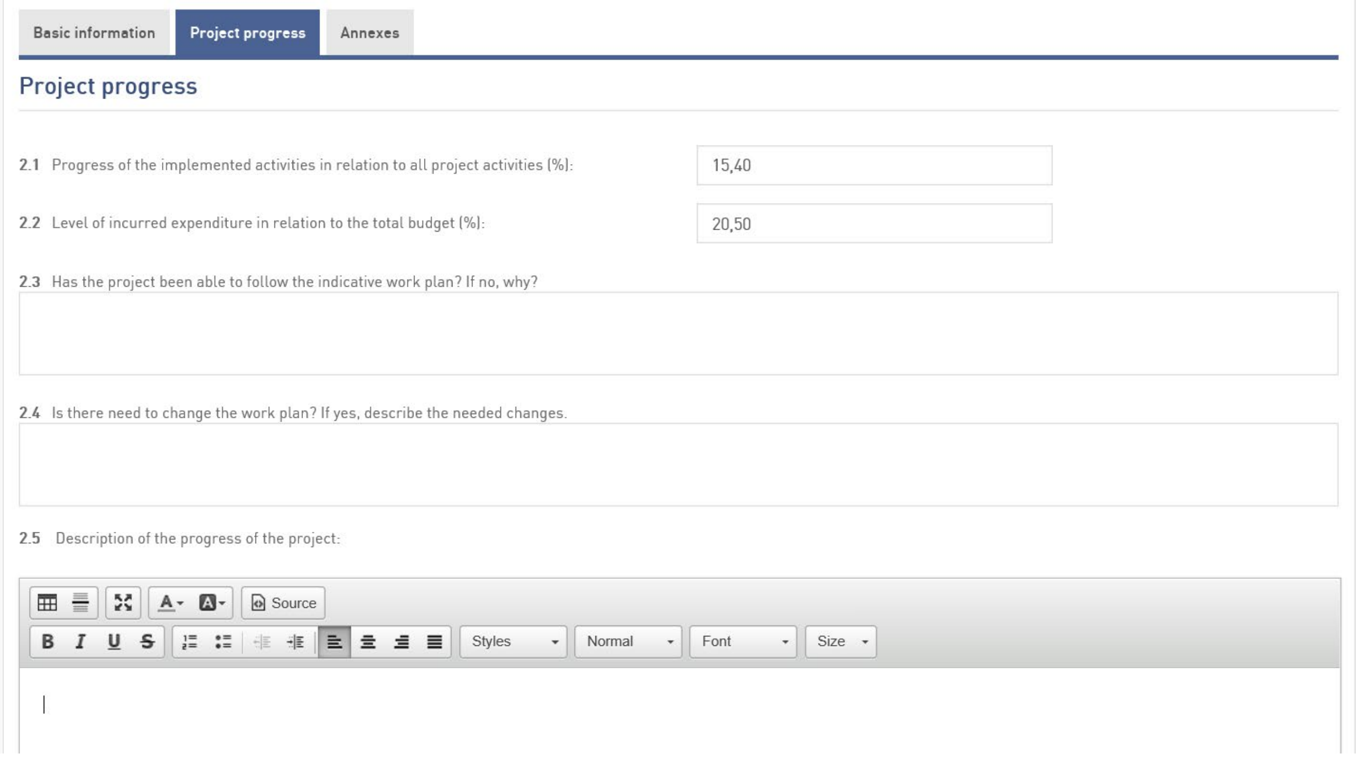
2.1.1 Basic information

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

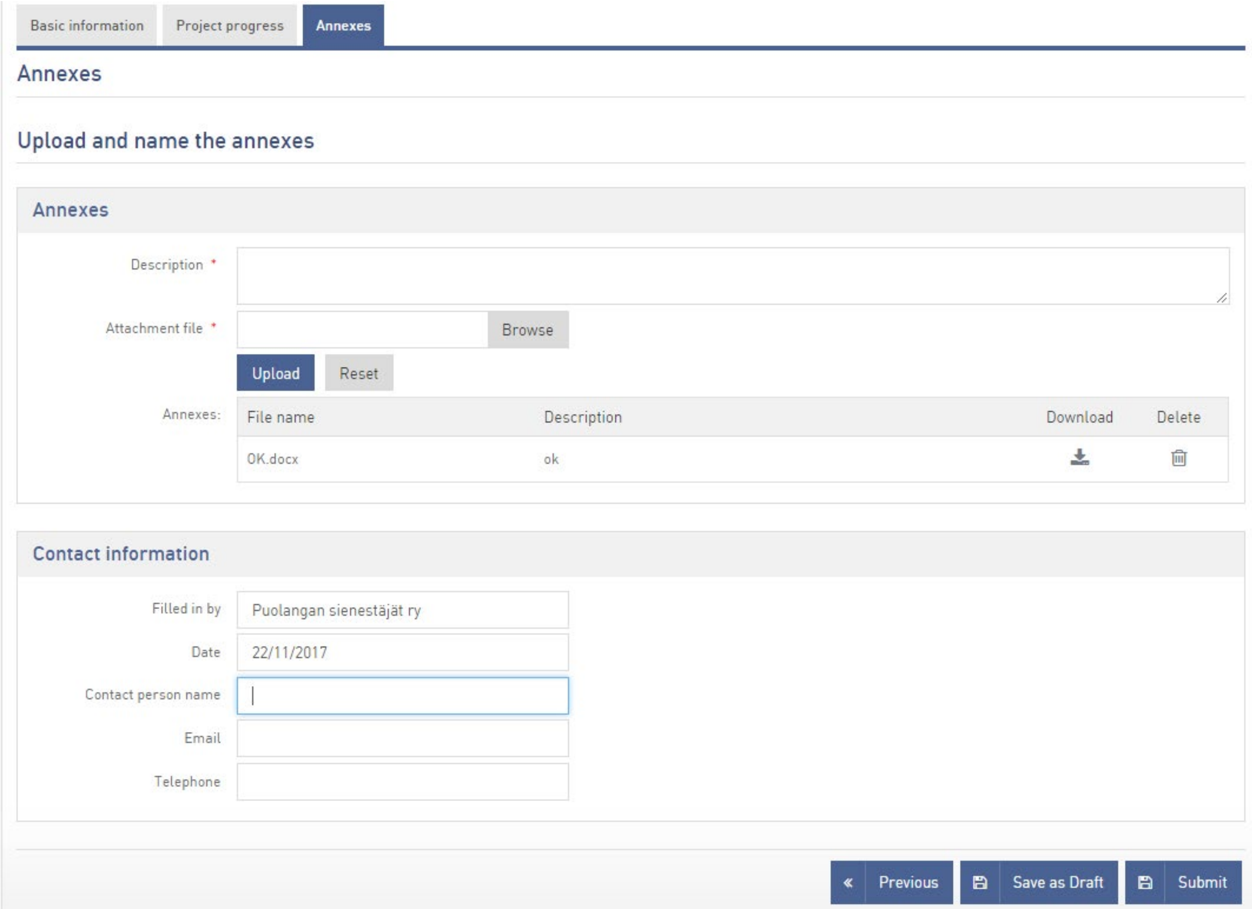


In Project progress view, project partner is asked to provide following information:

- 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:

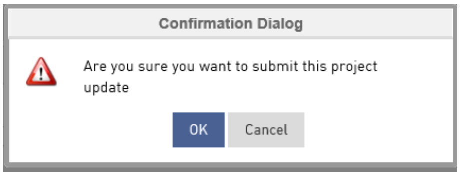
Project partner can save the updates and move to the next tab by pressing Save & Next push button.

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.

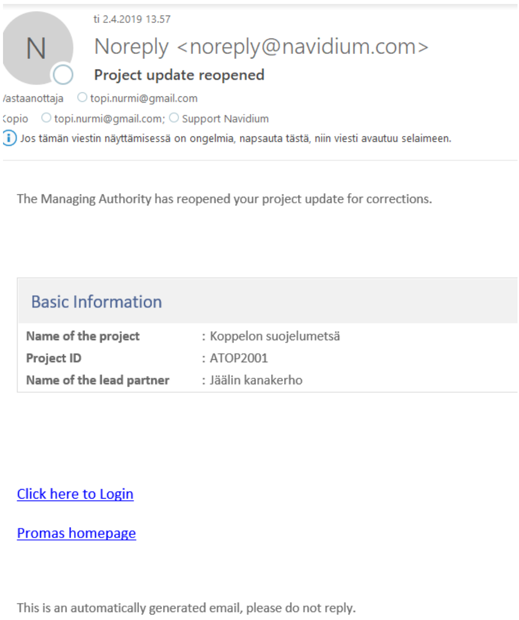


Press OK. System confirms that report has been submitted successfully.

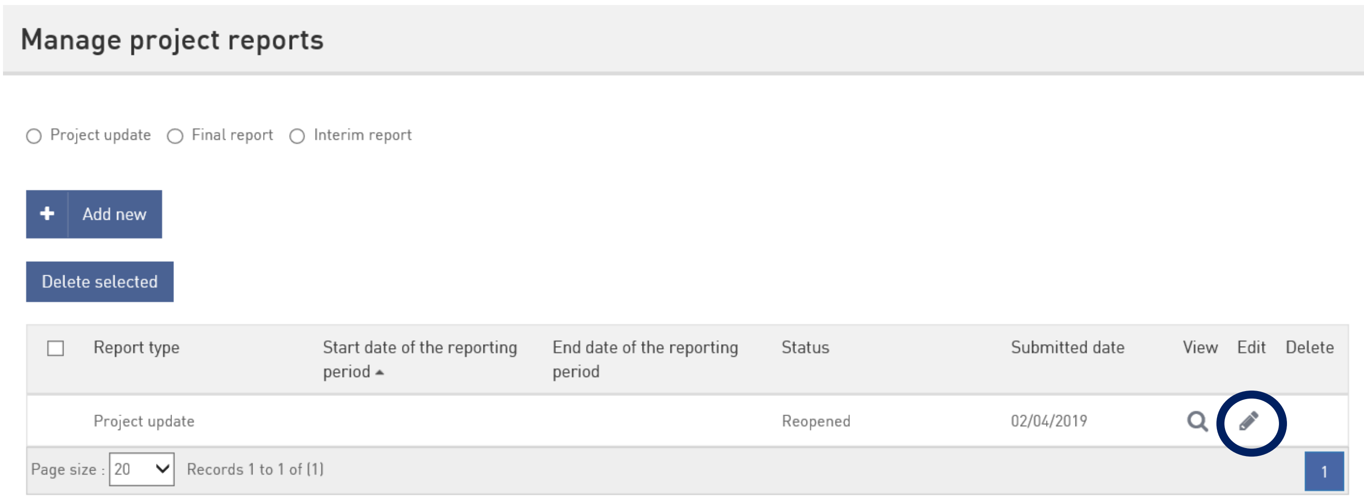
2.1.4 Project update reopened by the authority

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:

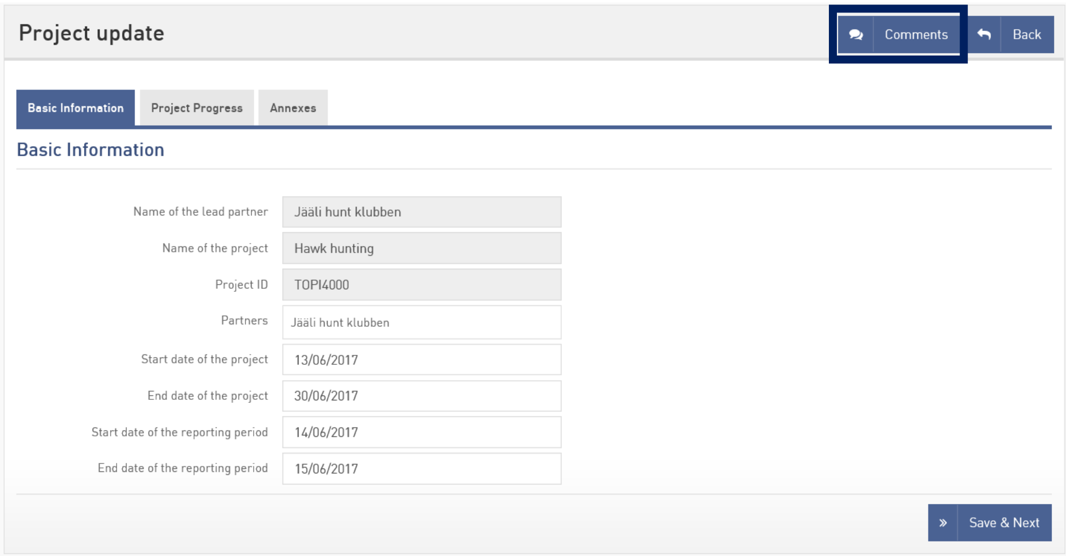


In the manage project reports, status of the project update has changed to reopened and it is editable for the project partner.

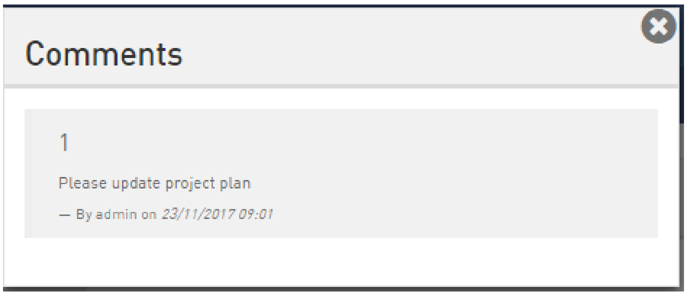


Project partner opens the report for editing by clicking Edit icon of the project update.

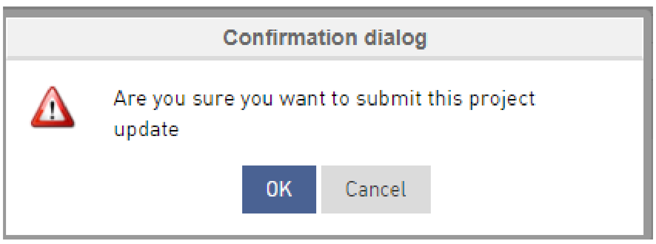
Project update view opens.



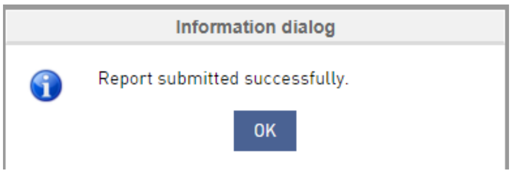
By clicking Comments push button, project partner can see what authority user has requested to be provided as additional information for the project update.



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

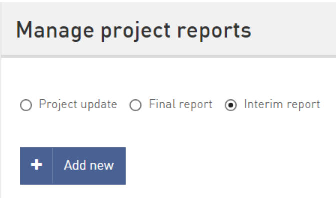


Press OK. System confirms that project update has been submitted successfully.

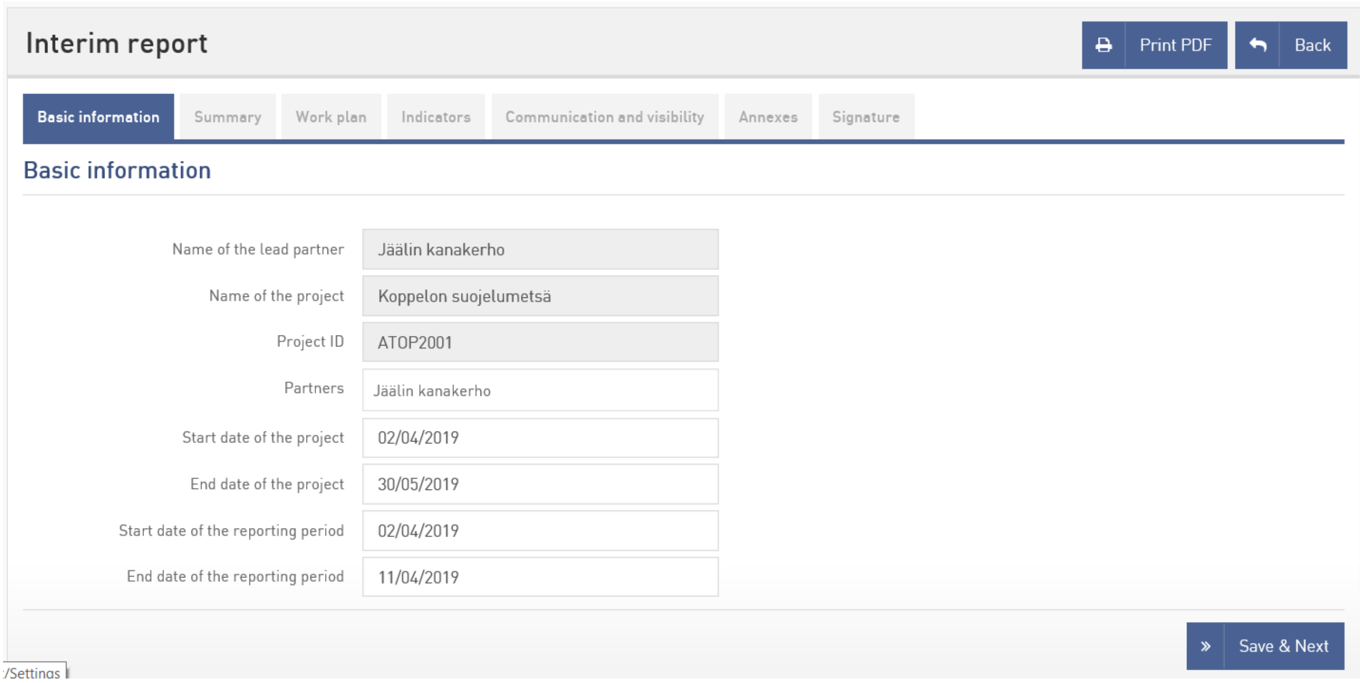


2.2 Interim report

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

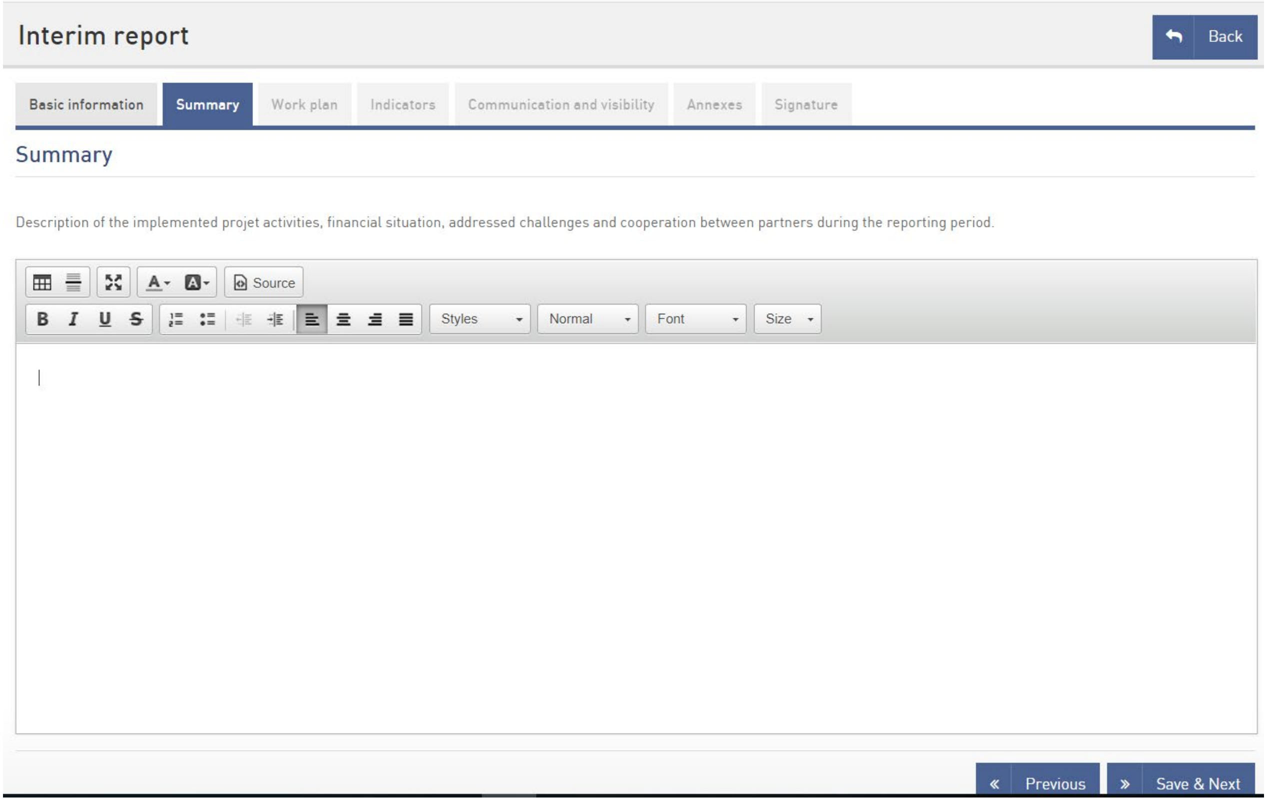
2.2.1 Interim report - Basic information

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

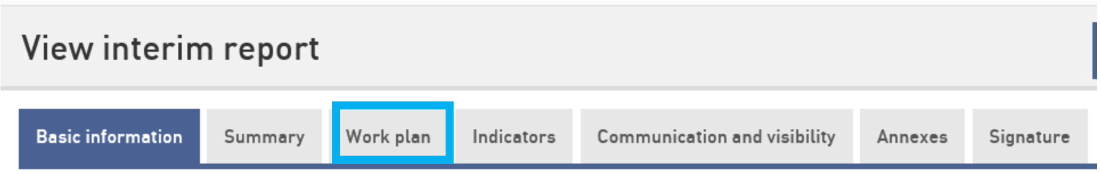


In the summary section of the interim report, project partner can add free text to describe the implemented project activities, financial situation, addressed challenges and cooperation between partners during the reporting period.

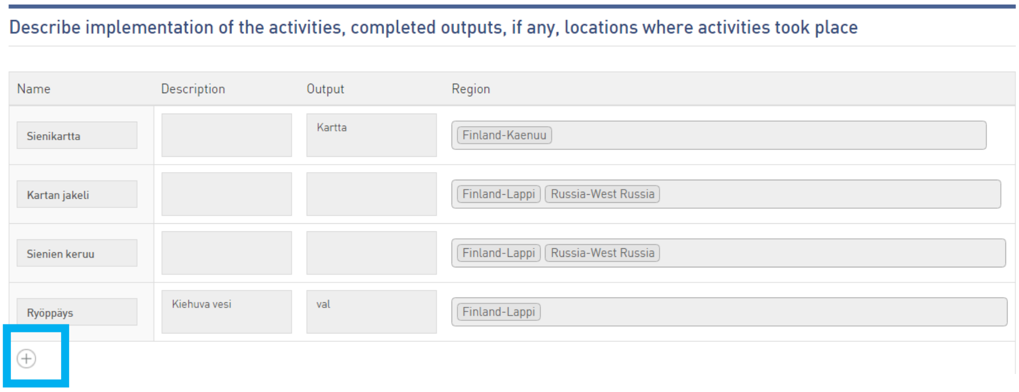
Project partner can save the updates and move to the next tab by pressing Save & Next push button.

2.2.3 Interim report – Work plan

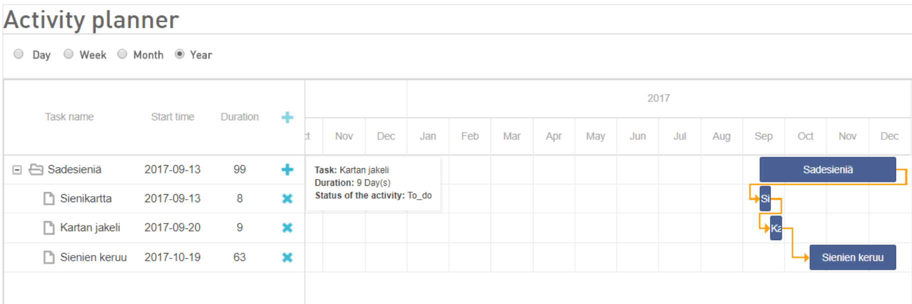
Project partner can update the activity work plan for the project. Updated activity plan is a new version of the activity plan as original Activity plan will remain as it was in the application. In case several Interim reports will be created, and activity plan will be updated, the previous activity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



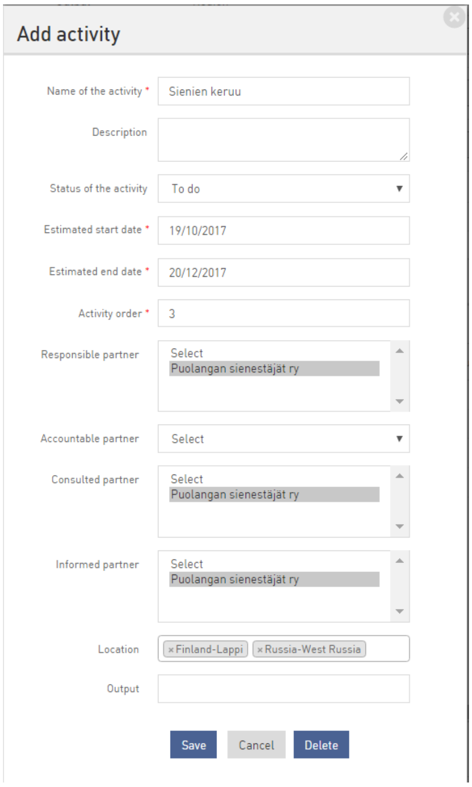
New activity can be added by clicking Click + sign.



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



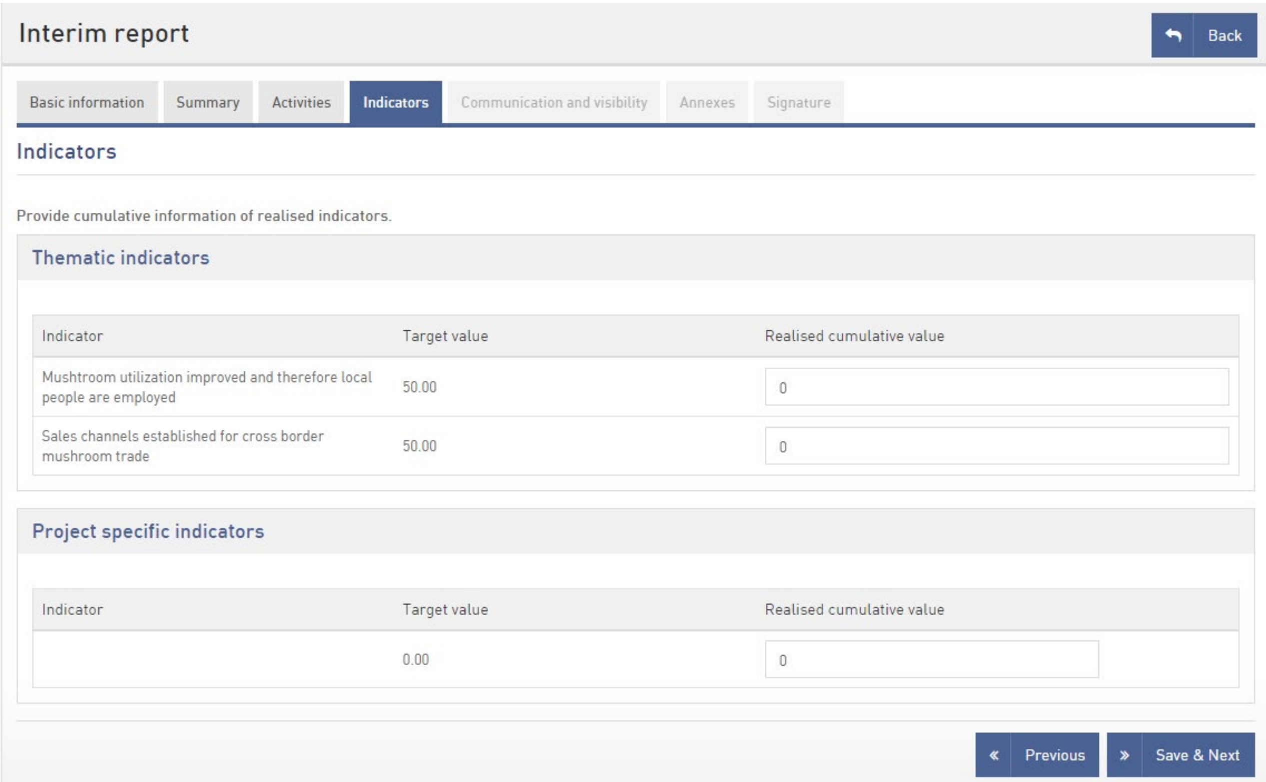
Activity pop up window opens for creating a new task or editing purposes.



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.

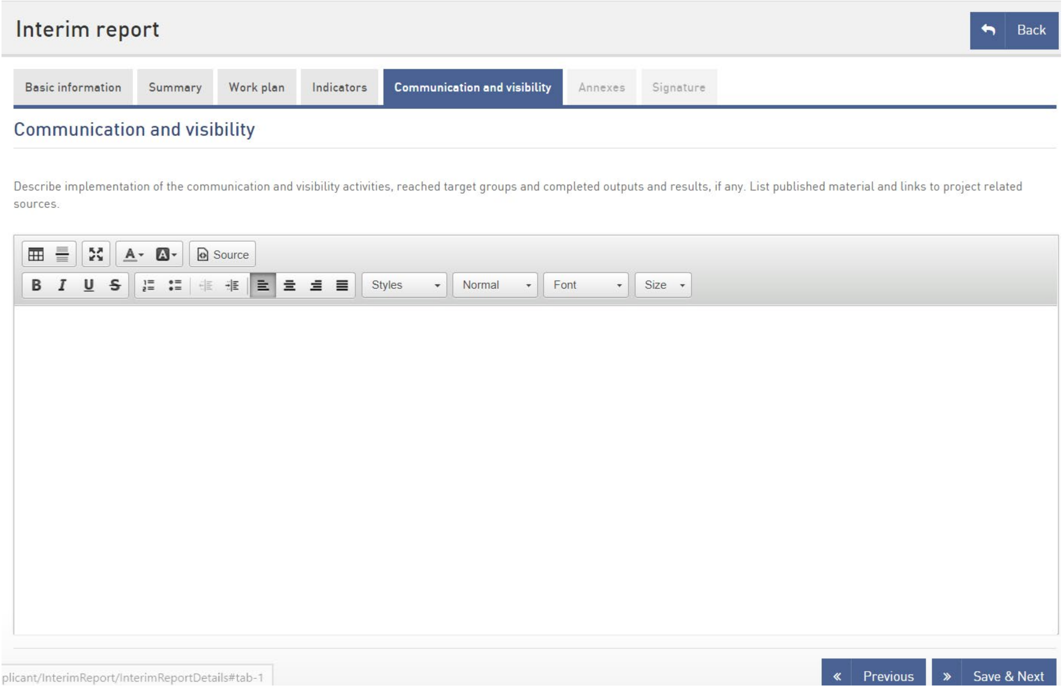
2.2.4 Interim report - Indicators



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

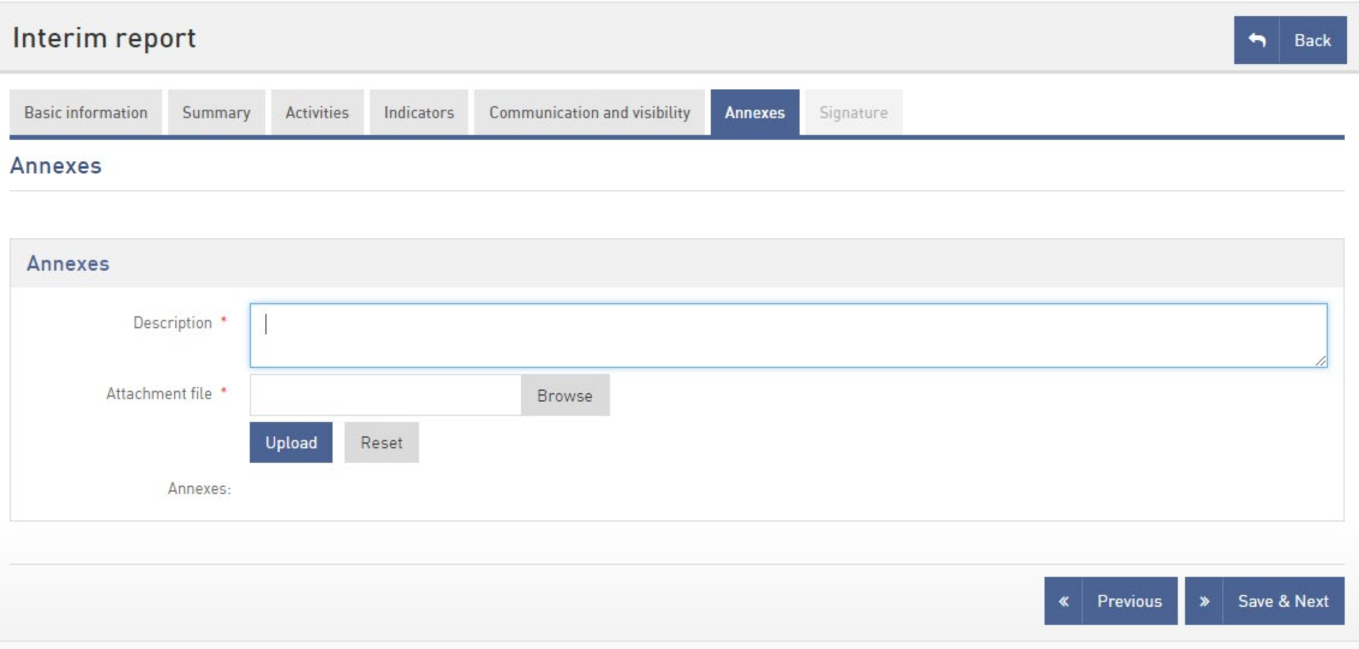
Project partner can save the updates and move to the next Tab by pressing Save & Next push button.

2.2.5 Interim report – Communication and visibility



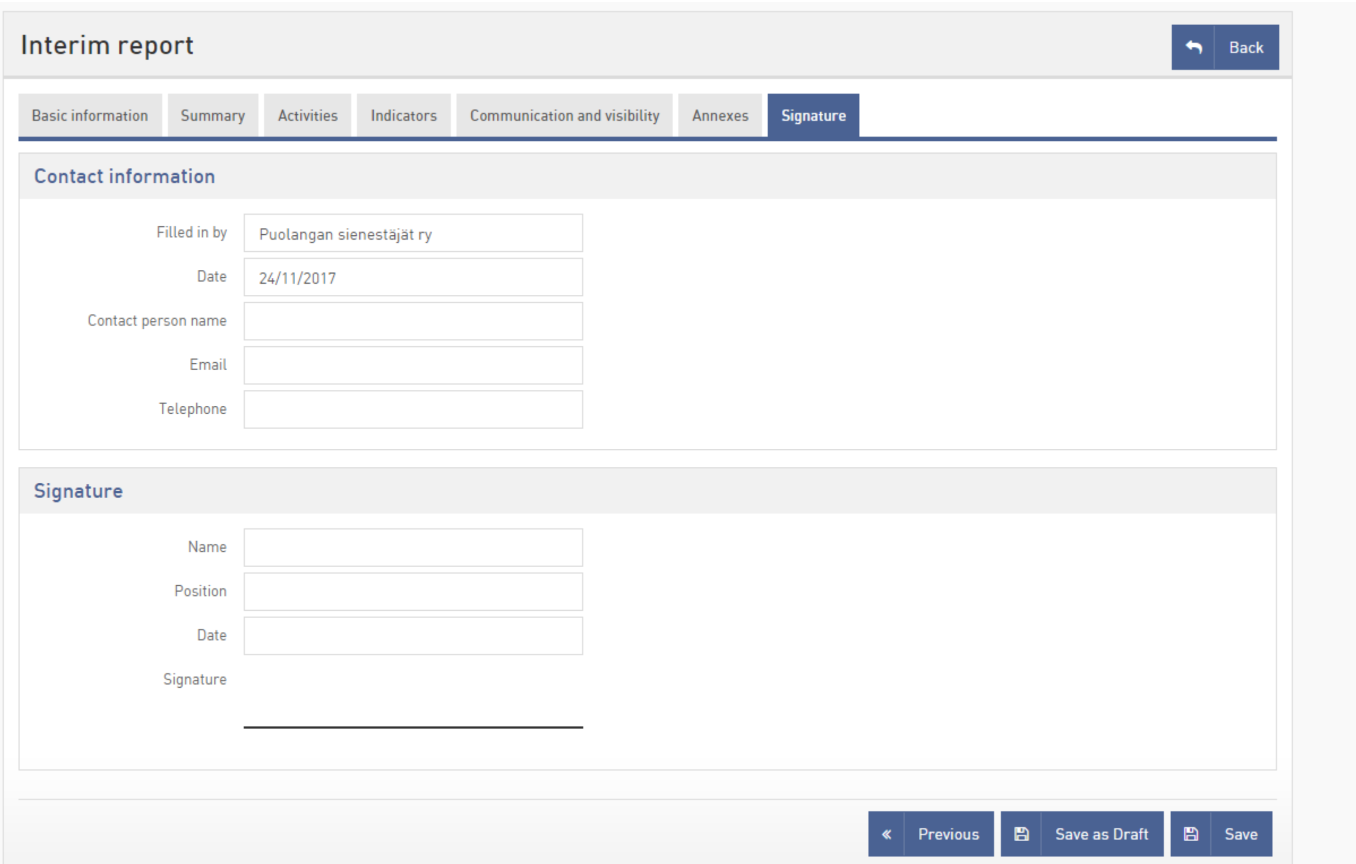
Project partner can update the implemented communication and visibility activities to this part of the interim report. Once completed, project partner can save the update and move to the next Tab by pressing Save & Next push button.

2.2.6 Interim report – Annexes



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



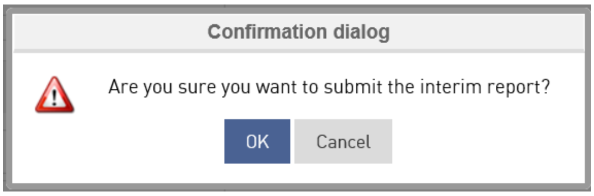
In signature section of the interim report, project partner must provide contact person details:

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

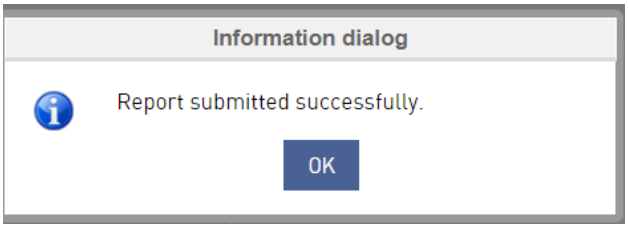
Project partner must also sign the interim report by providing:

- 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.



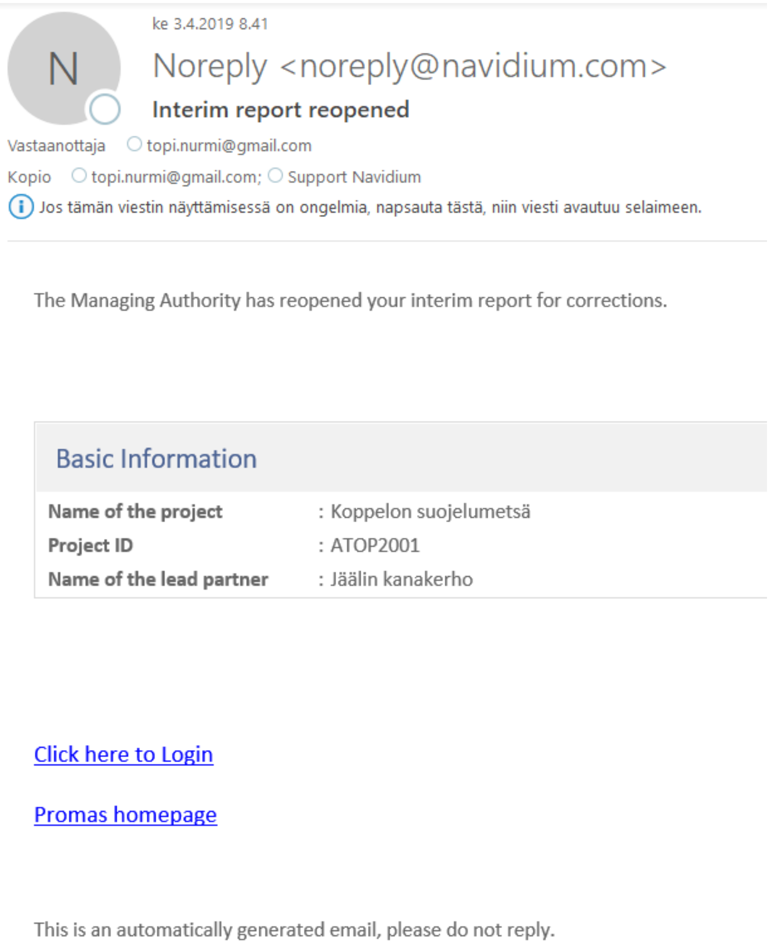
Press OK and system confirms that report has been submitted successfully.



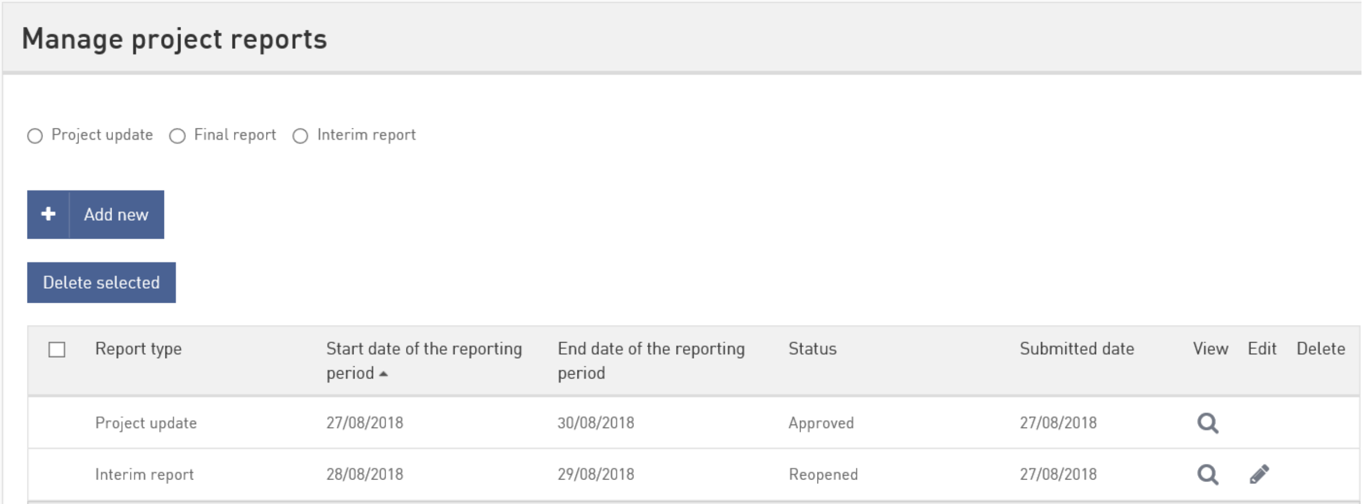
2.2.8 Interim report reopened by the authority

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.

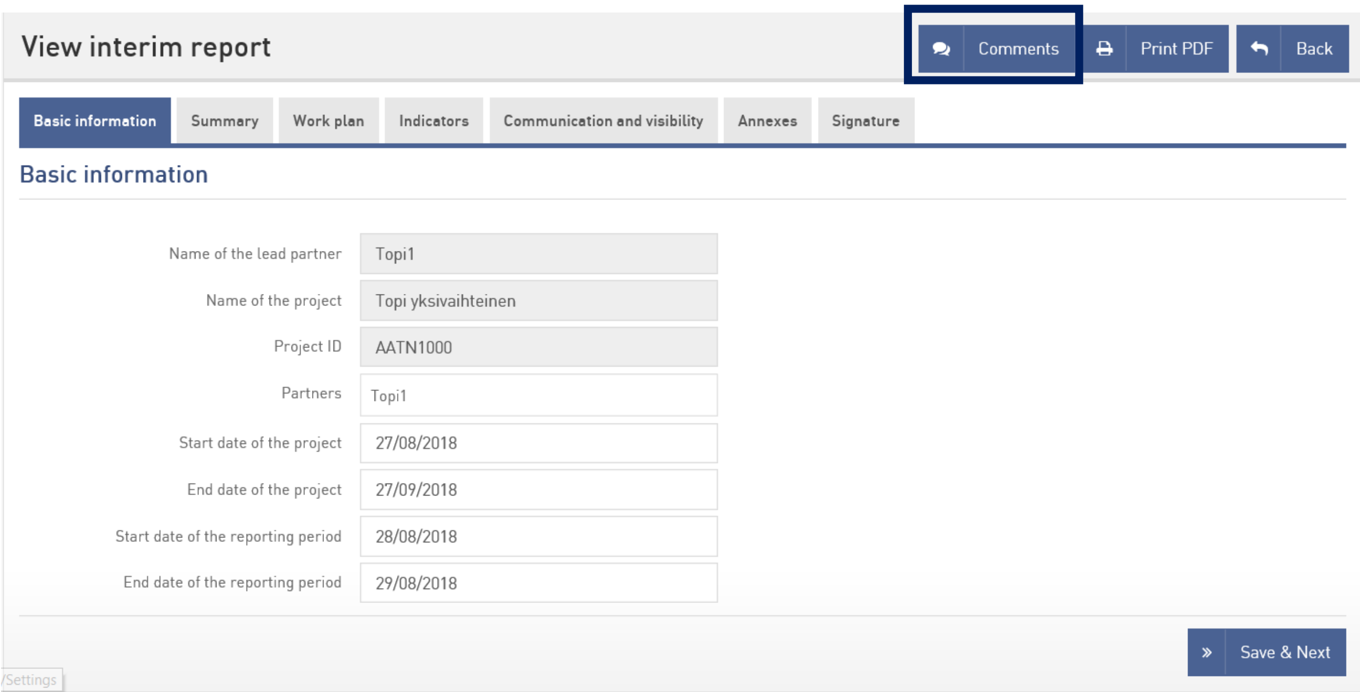


In the manage project reports, status of the interim report has changed to reopened and it is editable for the project partner.

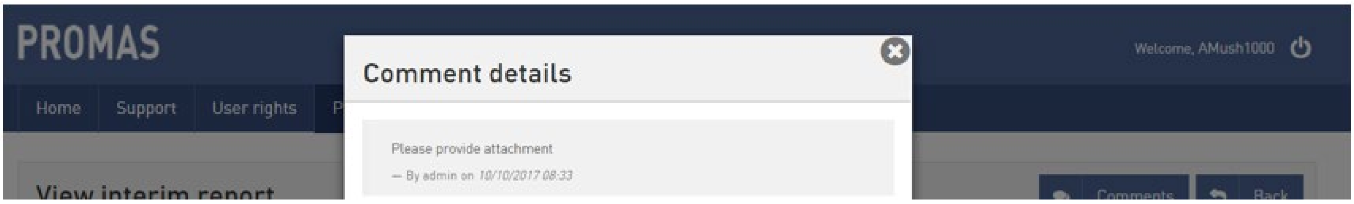


Project partner opens the report for editing by clicking edit icon of the interim report.

Interim report view opens.



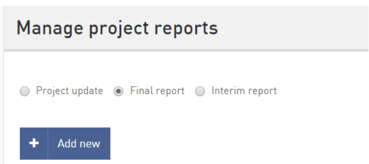
By clicking Comments push button, project partner can see what Authority user has requested to be provided as additional information for the interim report.



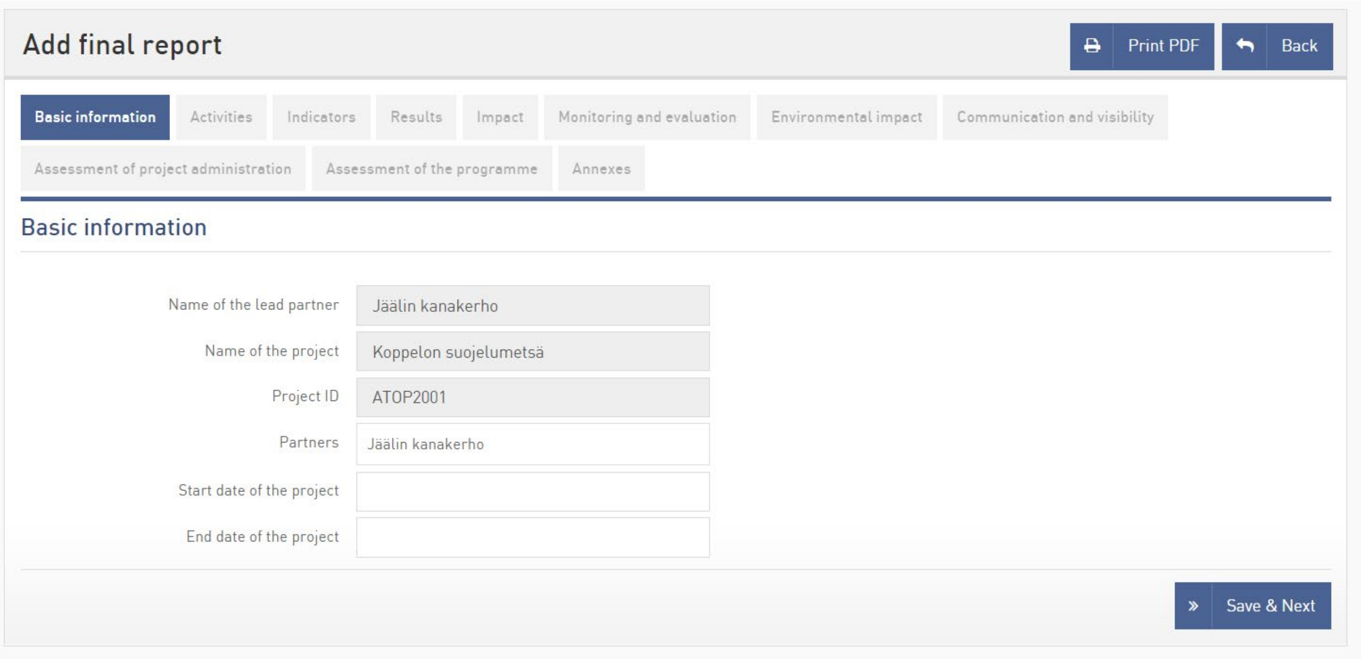
Project partner provides the requested additional information and Submits by pushing Submit push button. Authority will receive an email of the submitted interim report.

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.



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

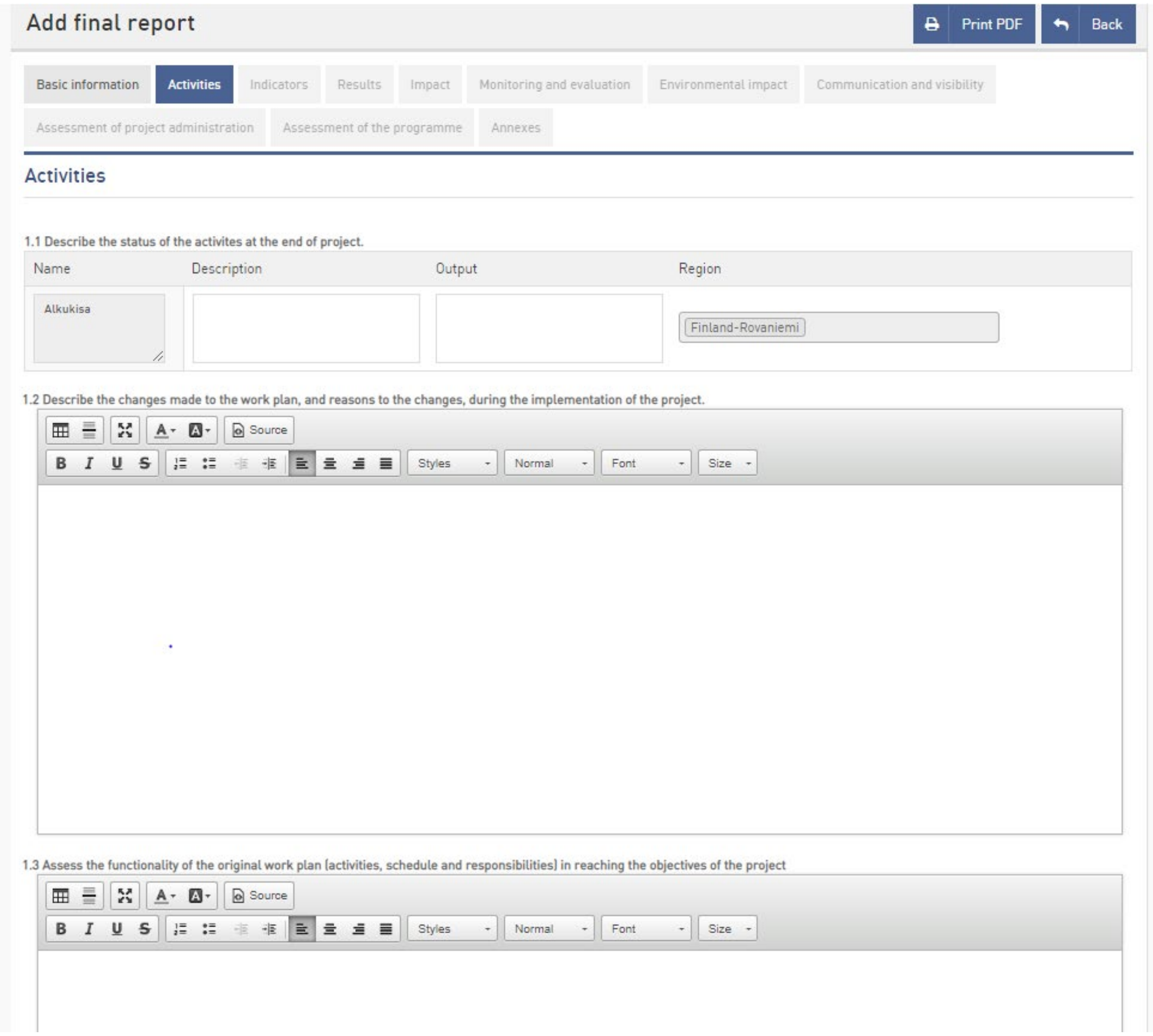
2.3.1 Final report - Basic information

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

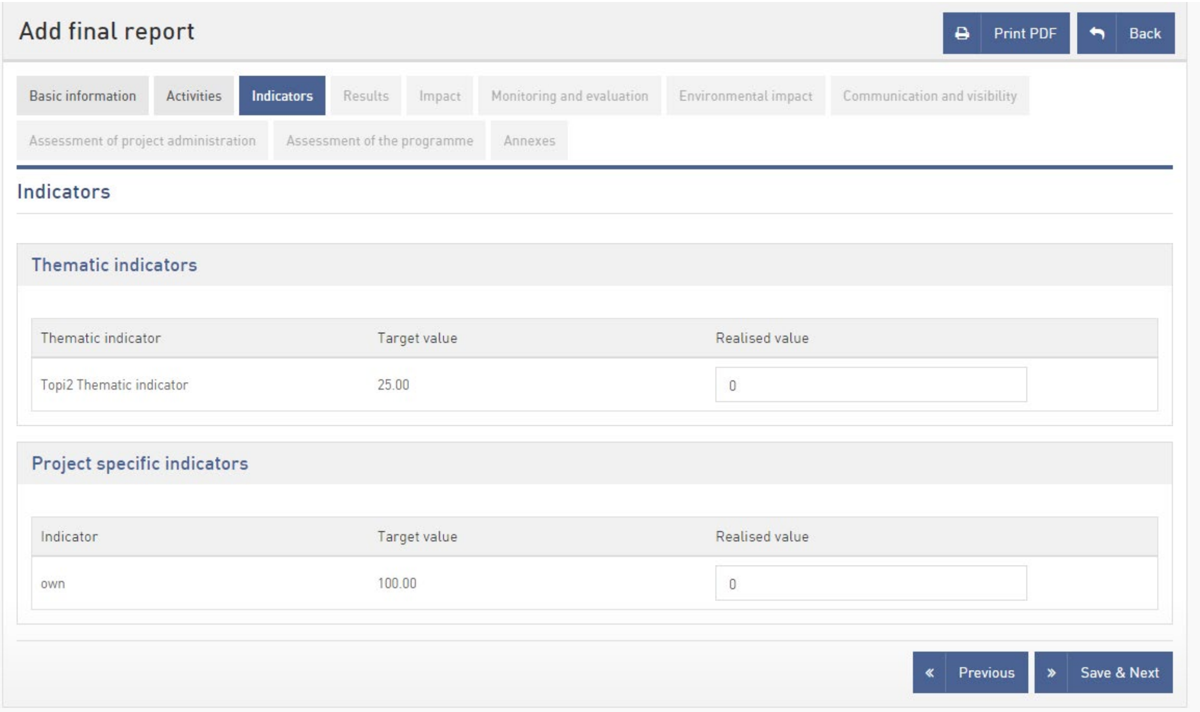


In the activity section of the Final report, project partner is requested to provide information to the following sections:

- 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 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.

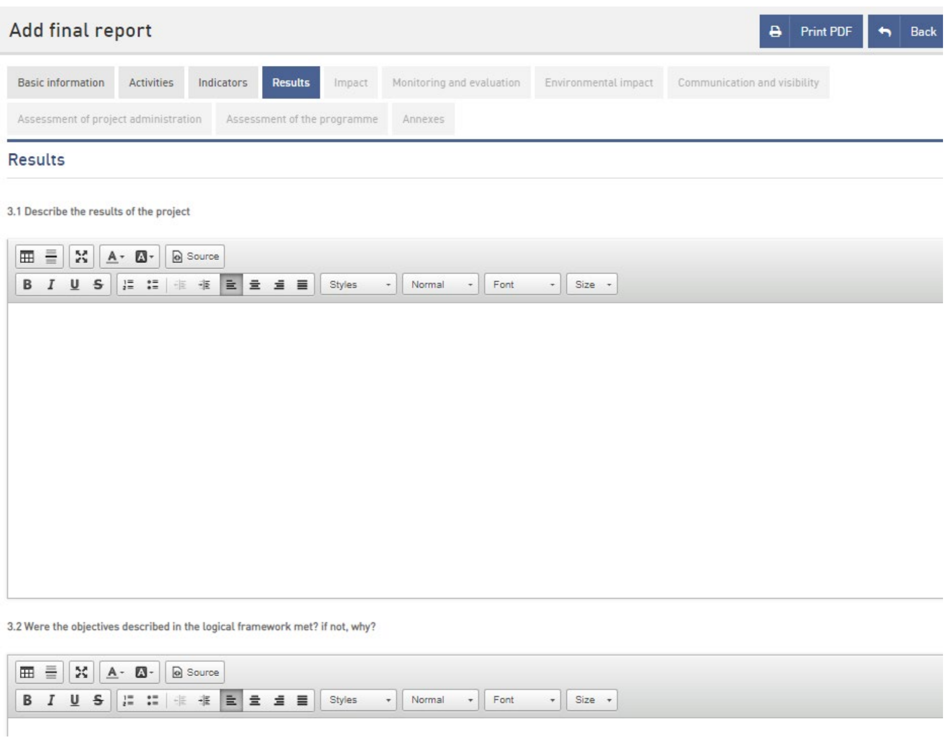
2.3.3 Final report – Indicators



In indicators part of the Final 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.

2.3.4 Final report – Results

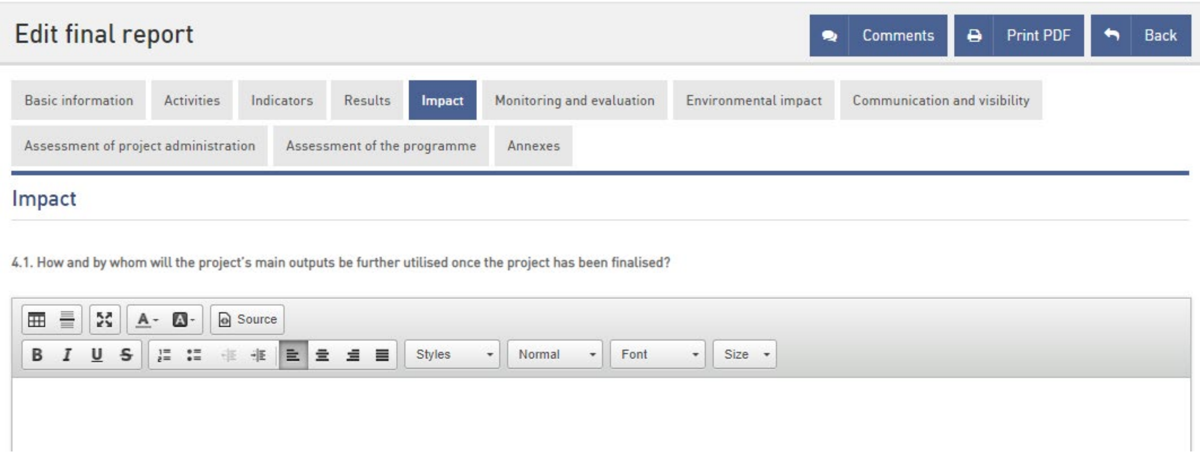


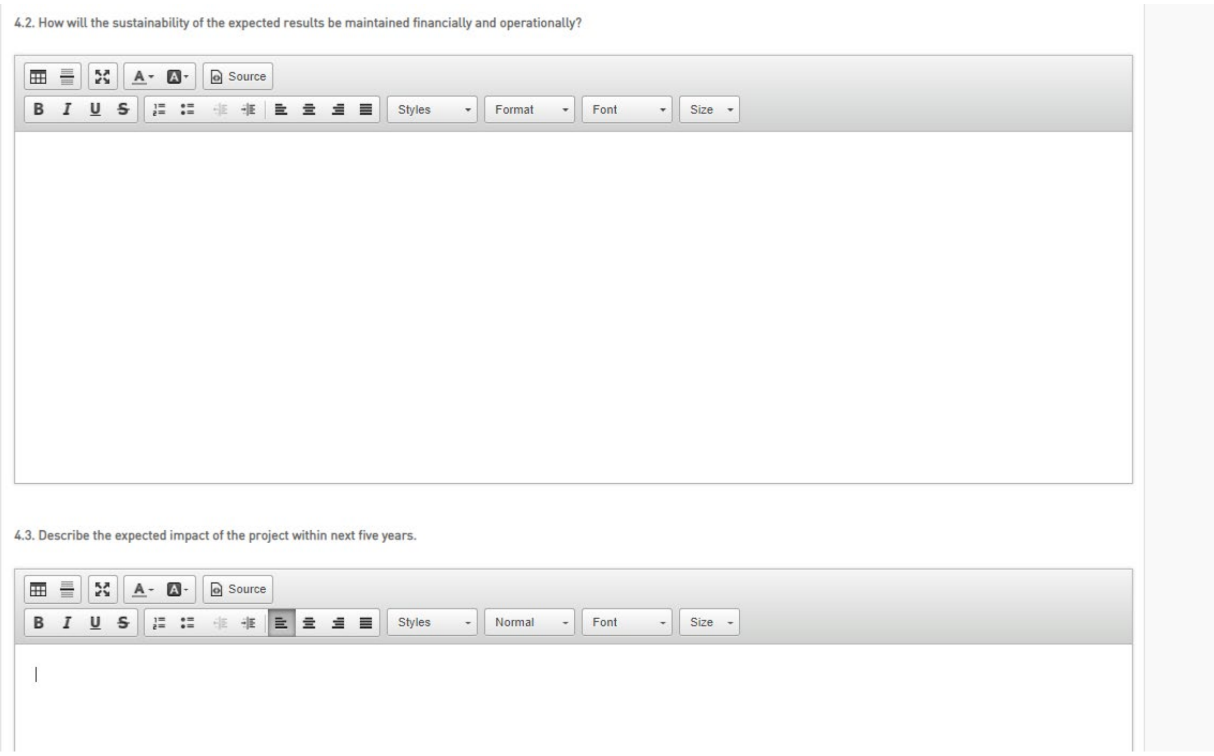
In the result section of the Final report, project partner is requested to provide information to the following sections:

- 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



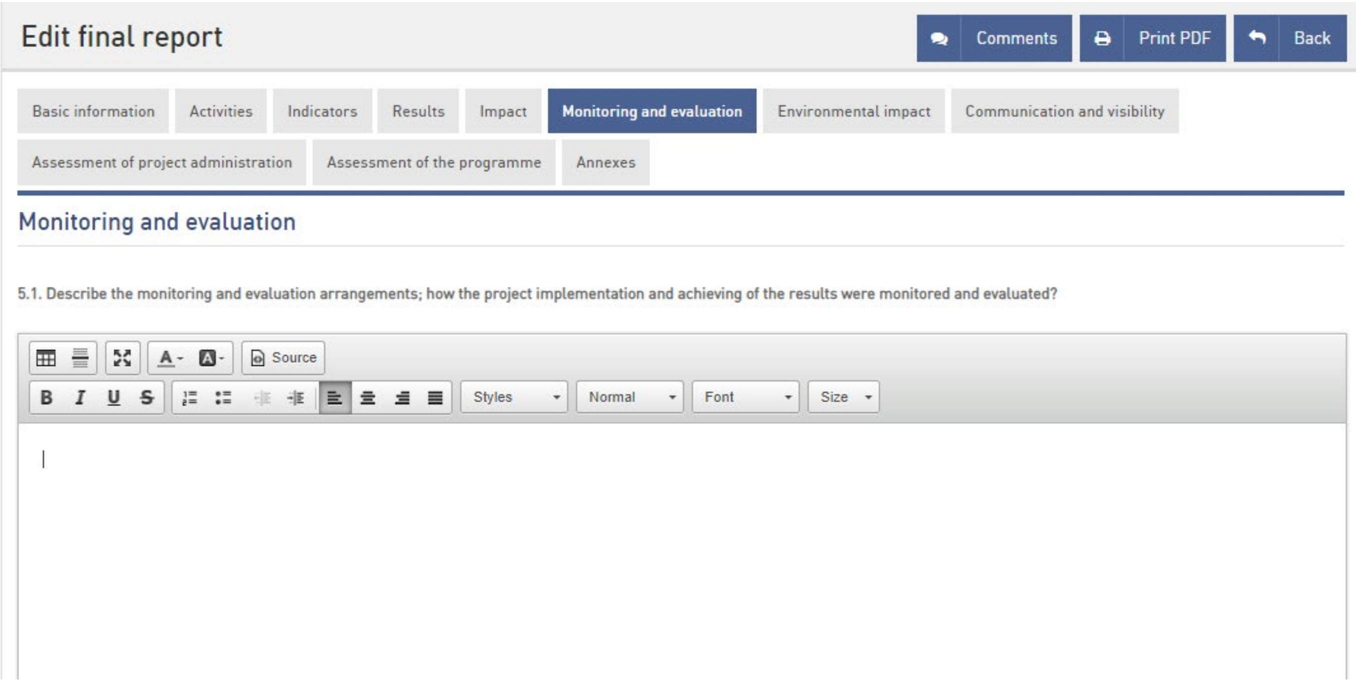


In the impact section of the Final report, project partner is requested to provide information to the following sections:

- 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

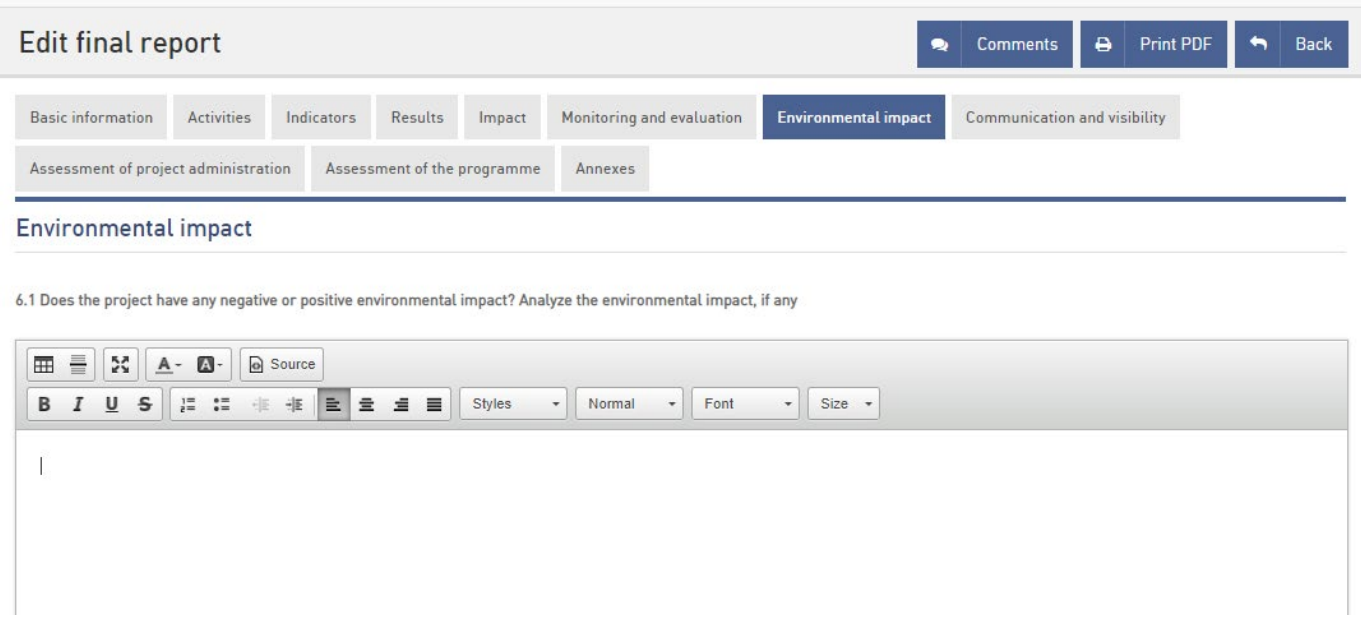


Partner must provide the answer to the following question in monitoring and evaluation section:

- 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

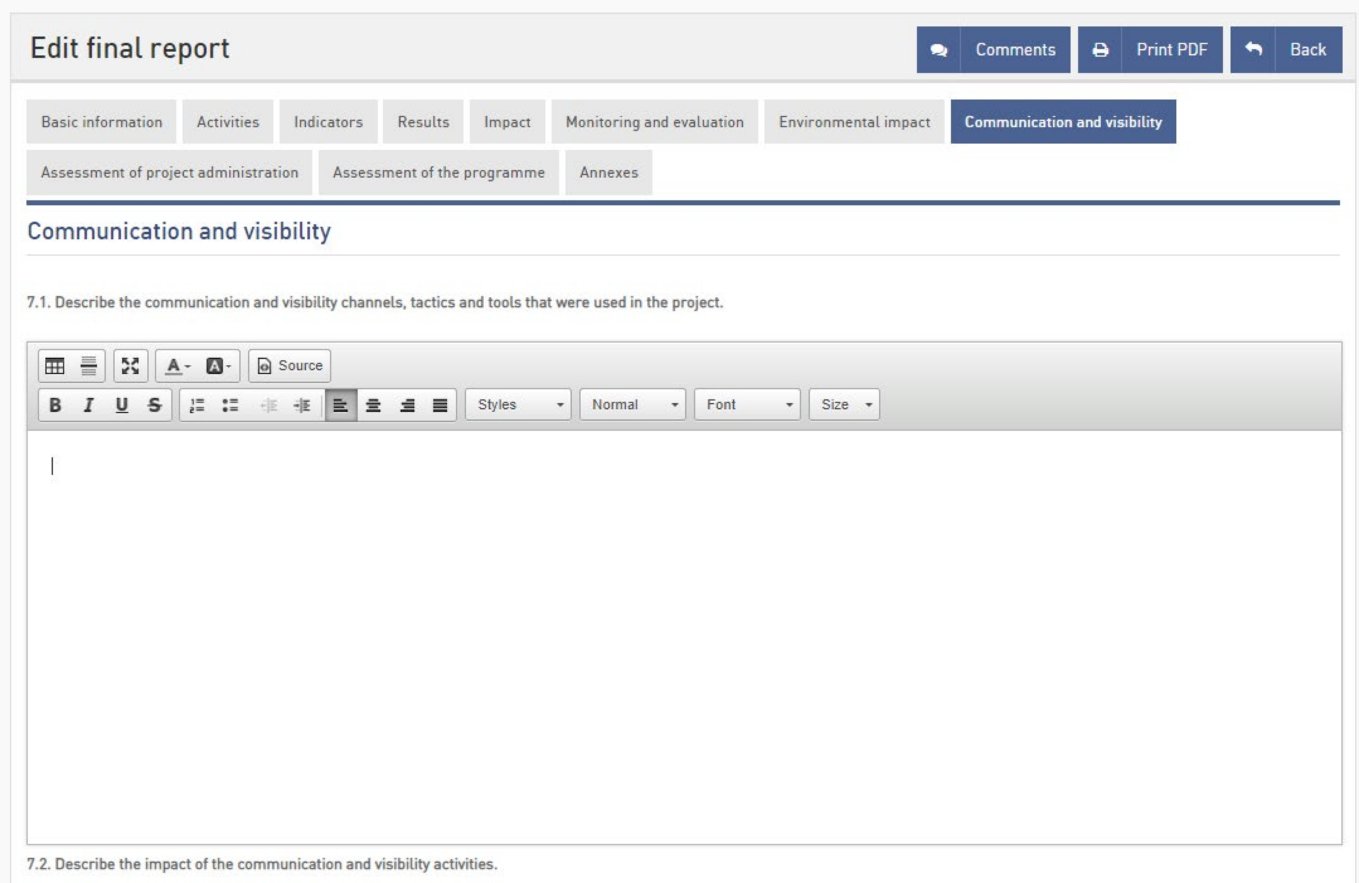


In the Environmental impact section of the Final report, project partner is requested to provide information to the following question:

- 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

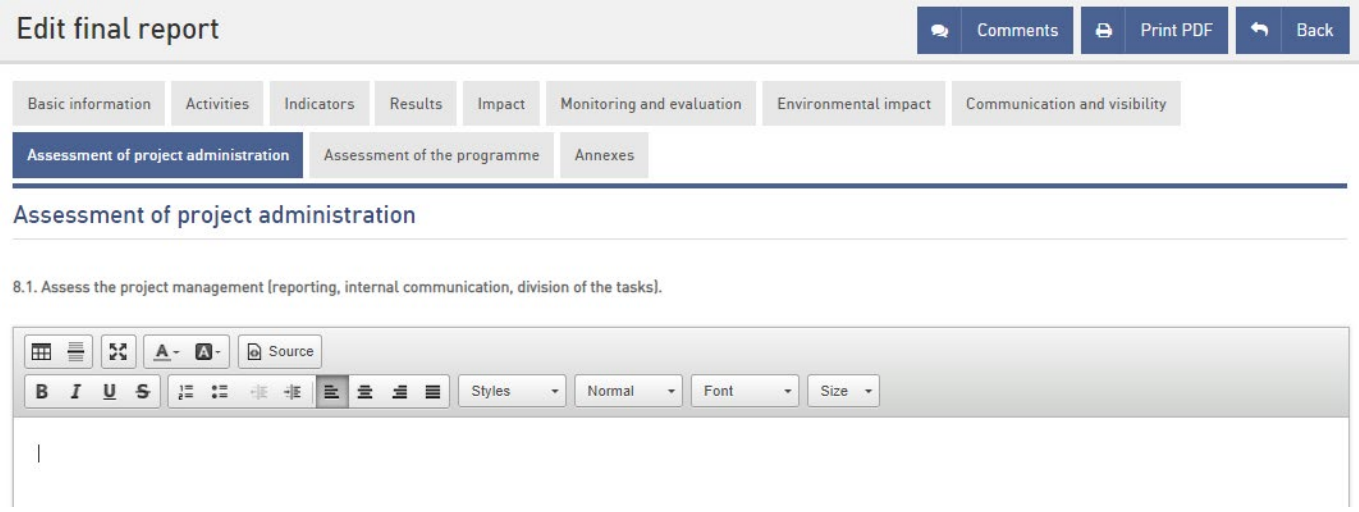


Project partner is requested to update the implemented communication and visibility activities to this part of the Final report:

- 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

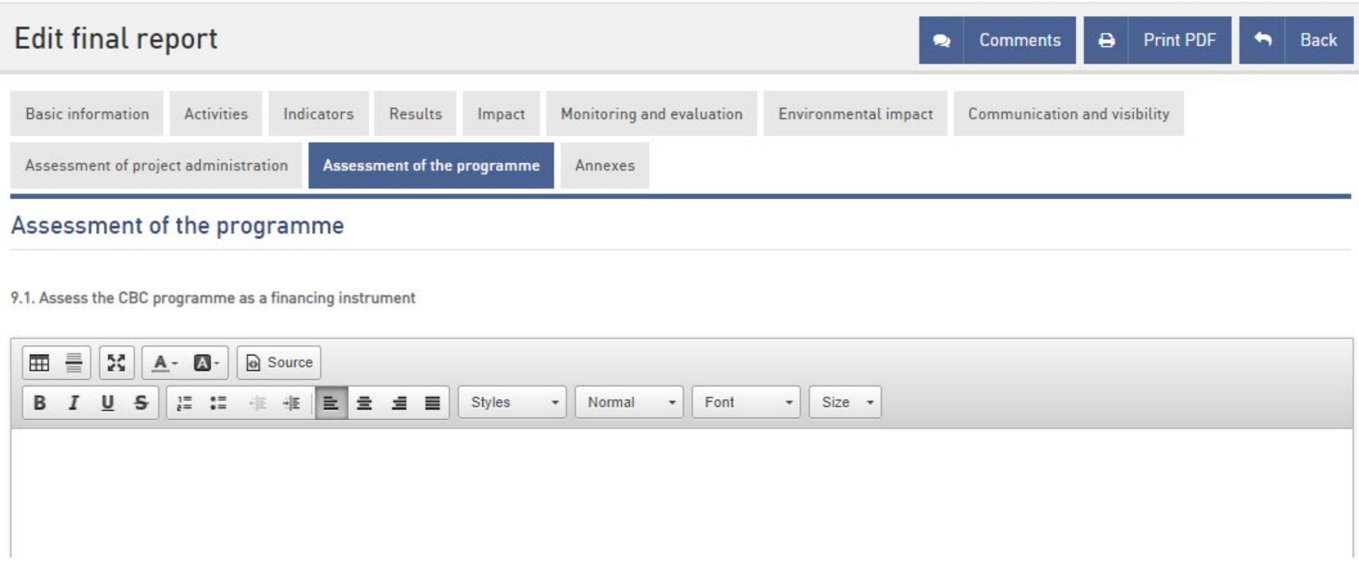


In the assessment of the project administration section of the Final report, project partner is requested to provide information to the following question:

- 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 partner is requested to update the implemented communication and visibility activities to this part of the Final report:

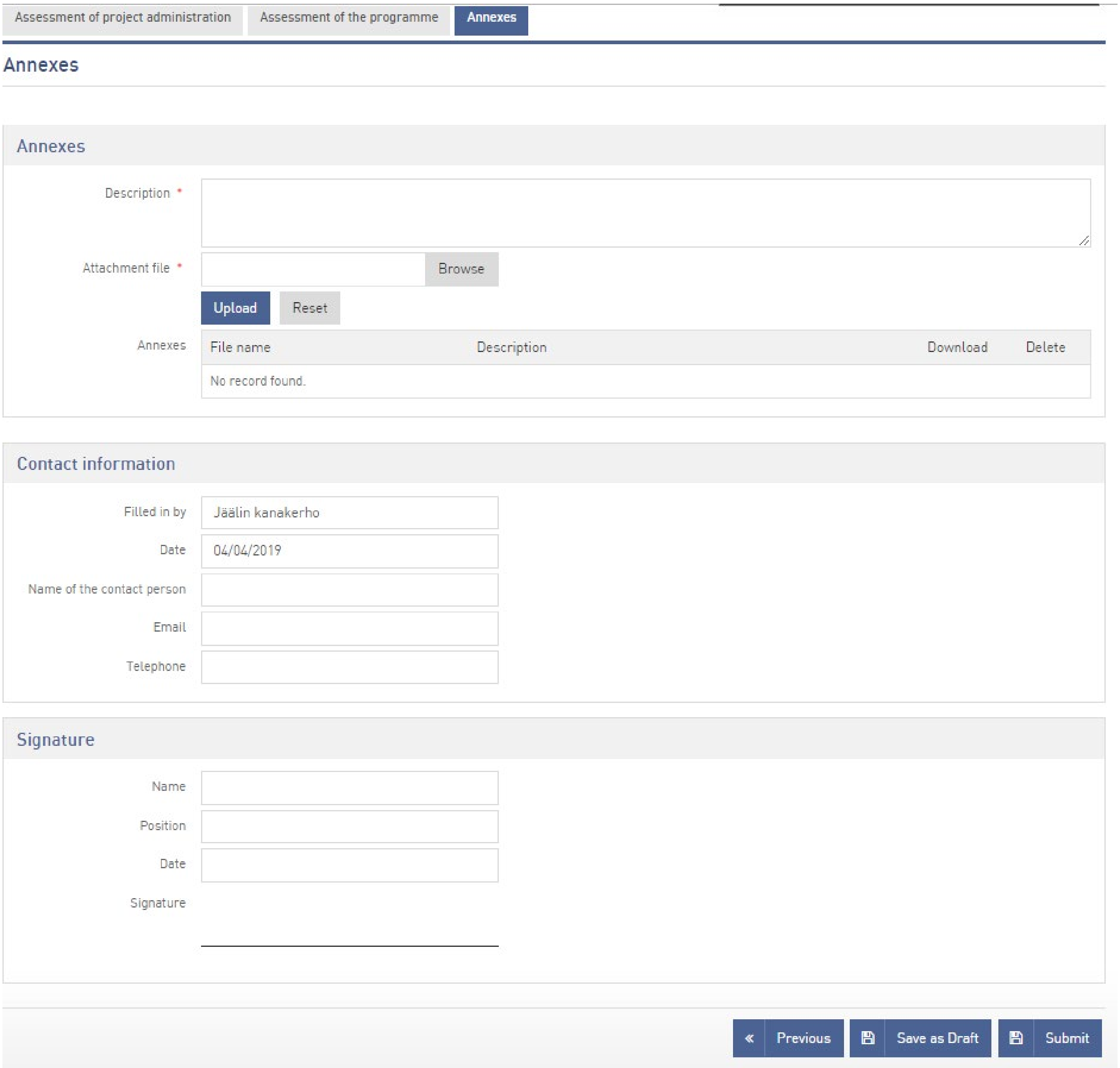
- 9.1. Assess the XXX programme as a financing instrument

- 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.



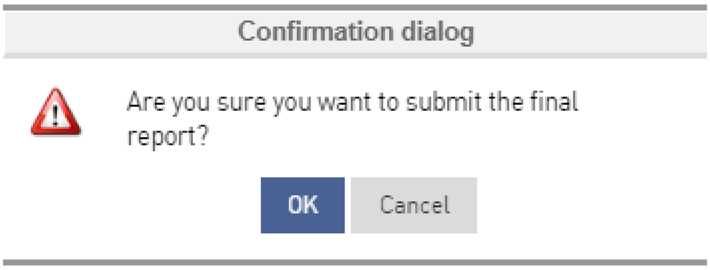
In signature section of the Final report, project partner must provide contact person details:

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

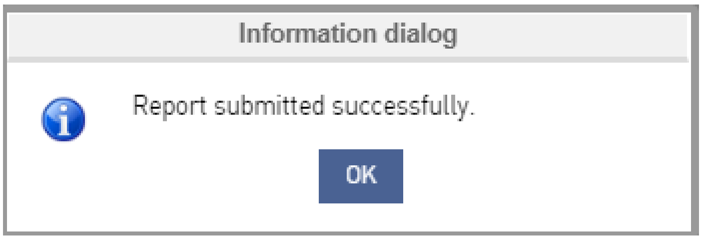
Project partner must also sign the Final report by providing:

- 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.



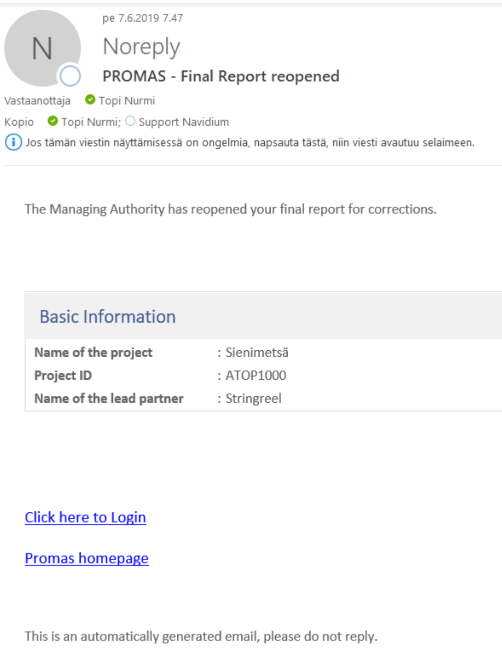
Press OK and system confirms that report has been submitted successfully.



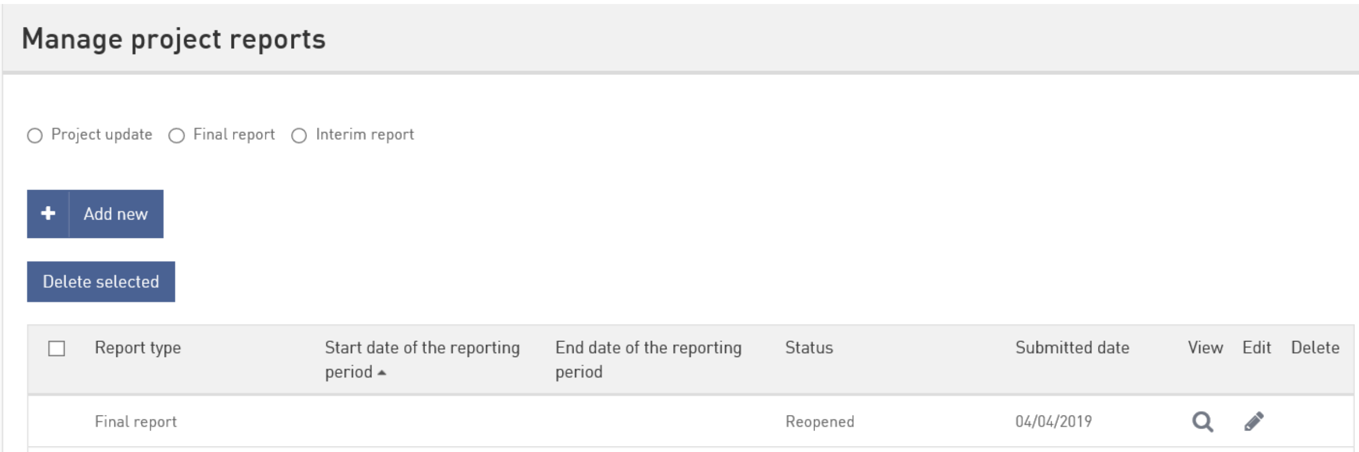
2.3.12 Final report reopened by the authority

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.

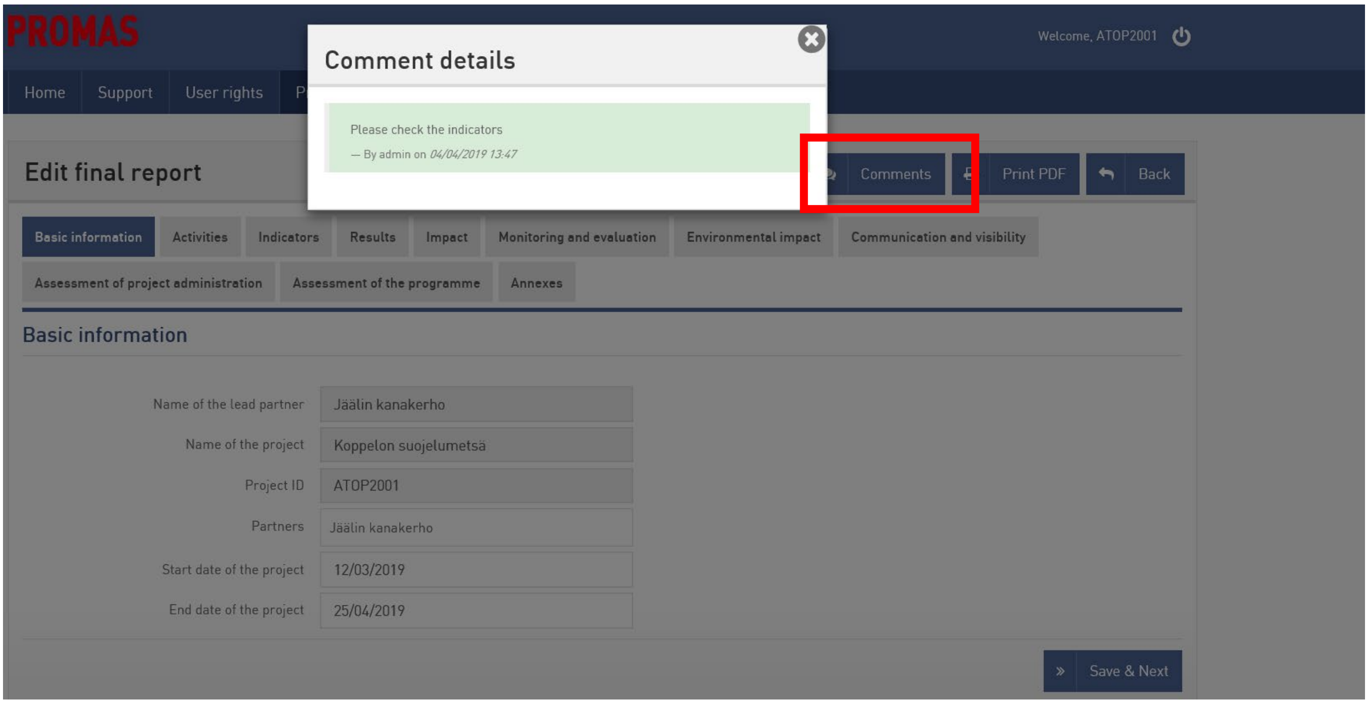


In the manage project reports, status of the Final report has changed to reopened and it is editable for the project partner.



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

Final report view opens.



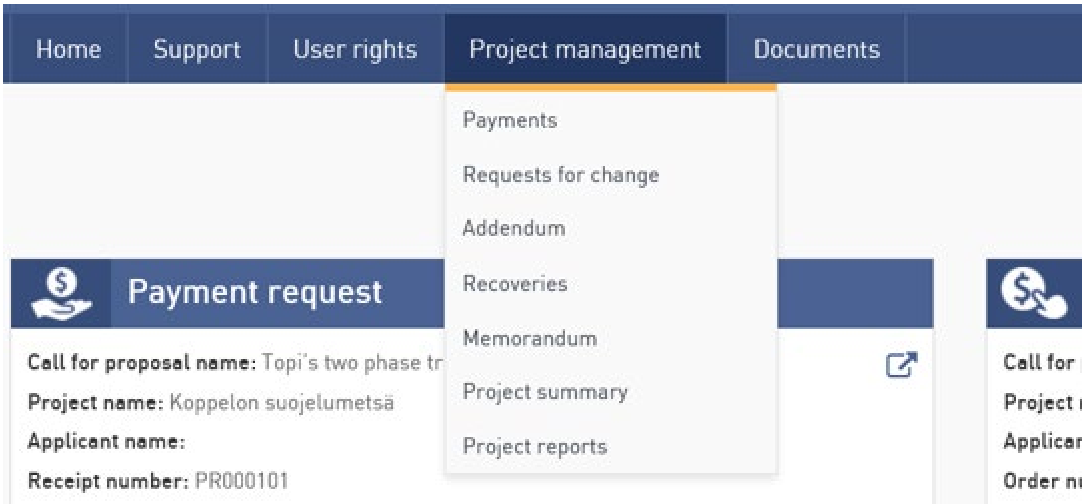
By clicking Comments push button, project partner can see what Authority user has requested to be provided as additional information for the Final report.

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

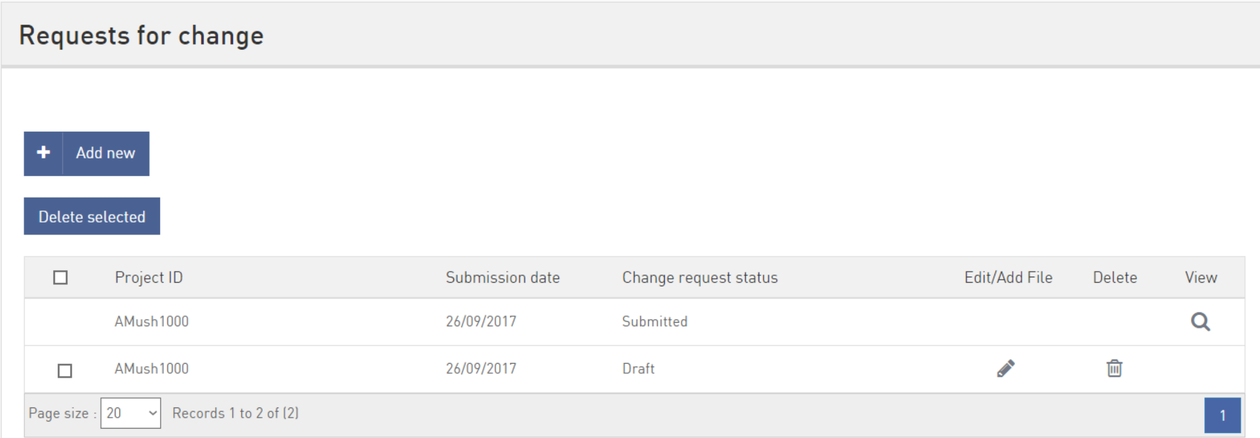
When Final report is approved by the authority, status of the final report changes to Approved. Please note that project partner will not receive any email concerning the approval of the final report.

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.

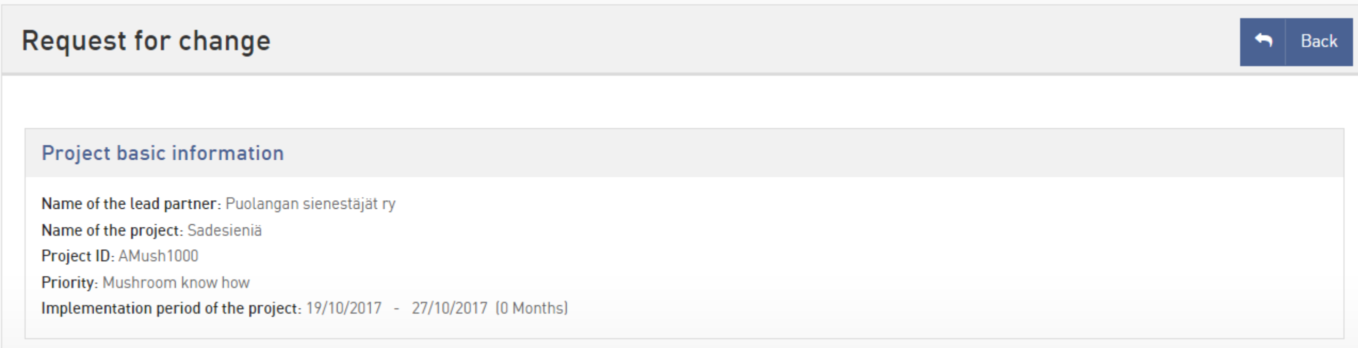


In the Requests for change result view, the details are displayed as follows:

- 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.



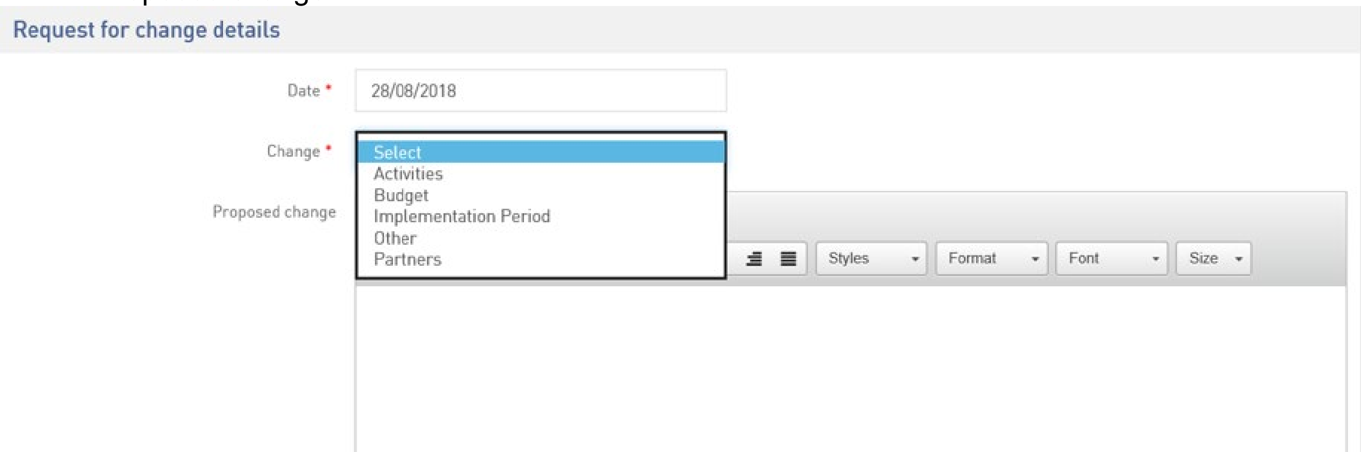
Basic information:

- 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

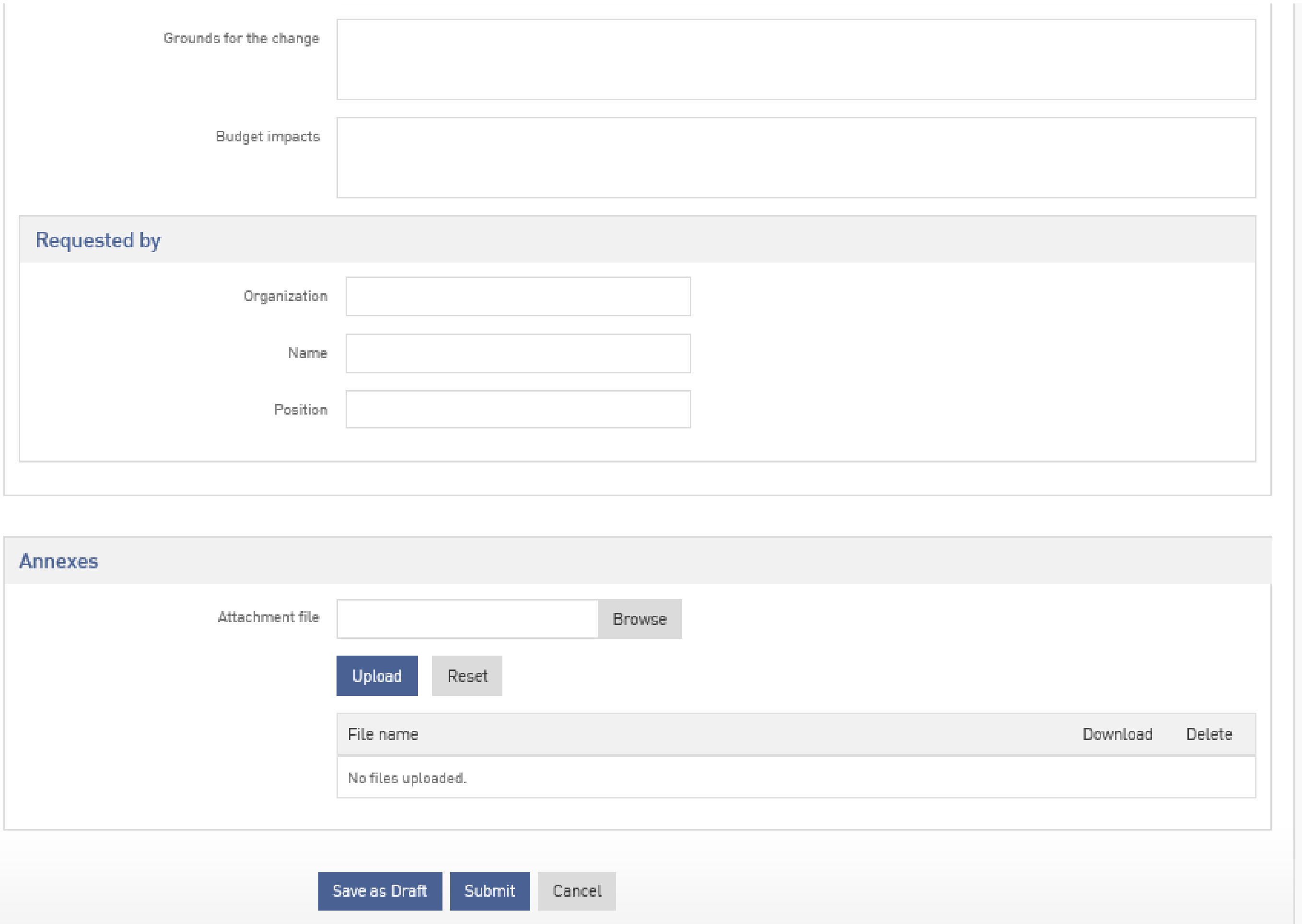


Project partner must also provide:

- Grounds for the change
- Budget impacts

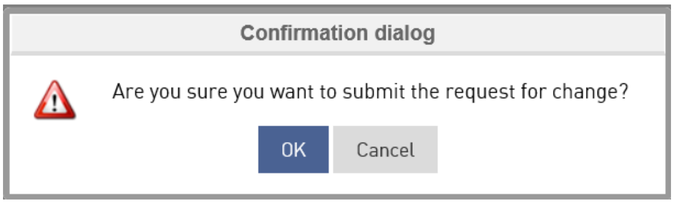
And details of the requestor:

- Organization
- Name
- Position

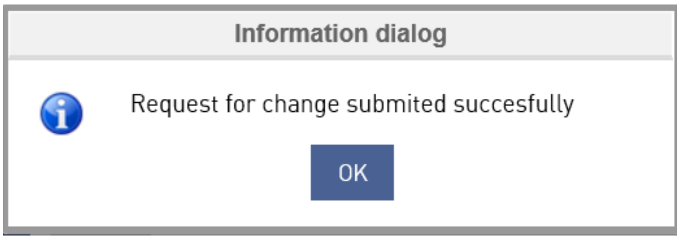


Project partner can also attach attachments to the request for change.

By pressing Submit project partner can submit the request for change for Authority review and approval.

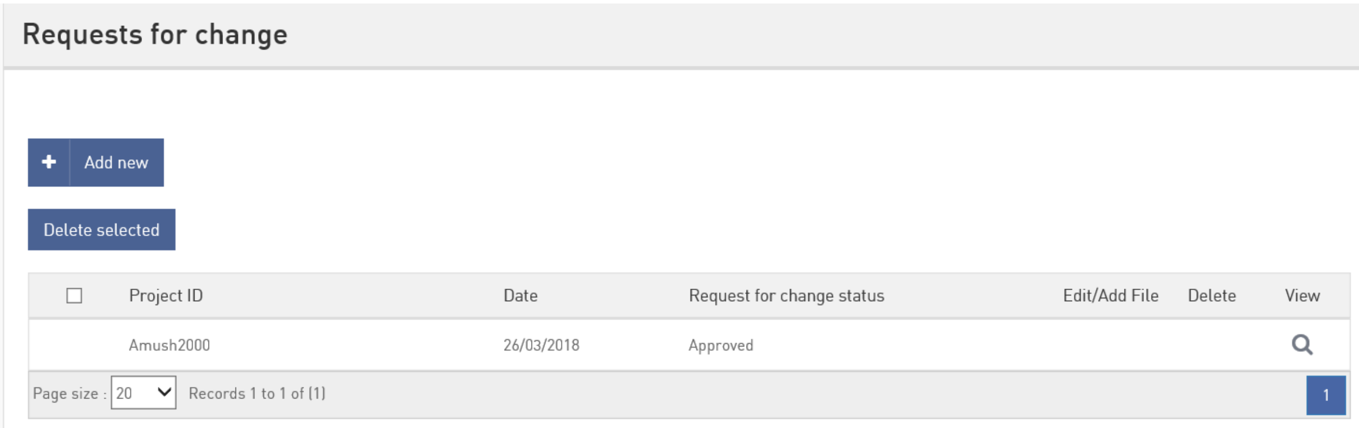


Press OK.



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.



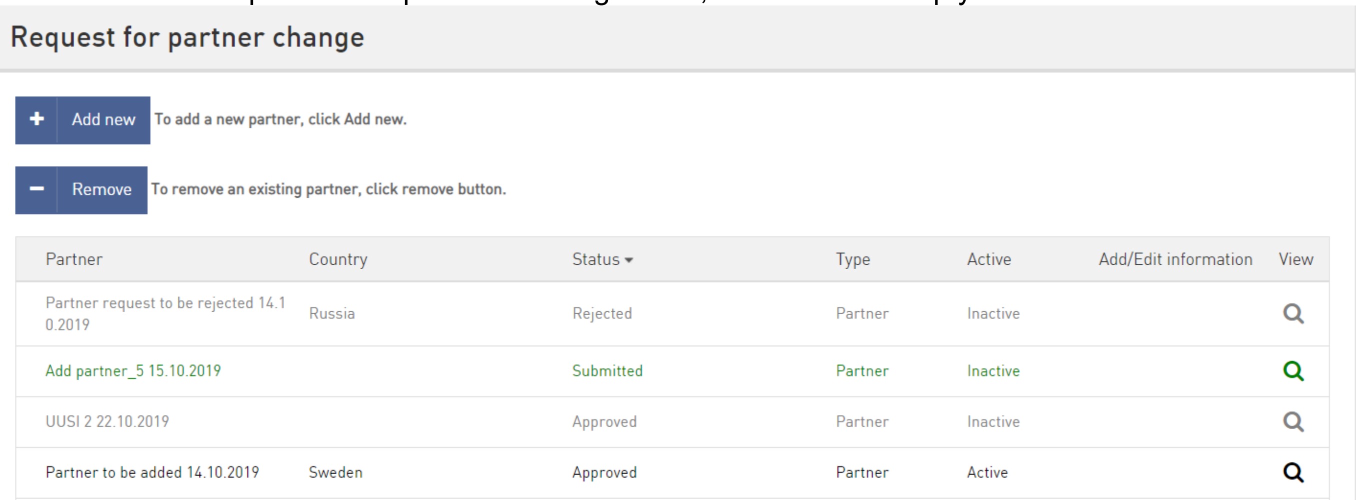
Click View icon for the request that you want to view.

Decision 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.



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		
UUSI 2 22.10.2019		Approved	Partner	Inactive		
Partner to be added 14.10.2019	Sweden	Approved	Partner	Active		

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

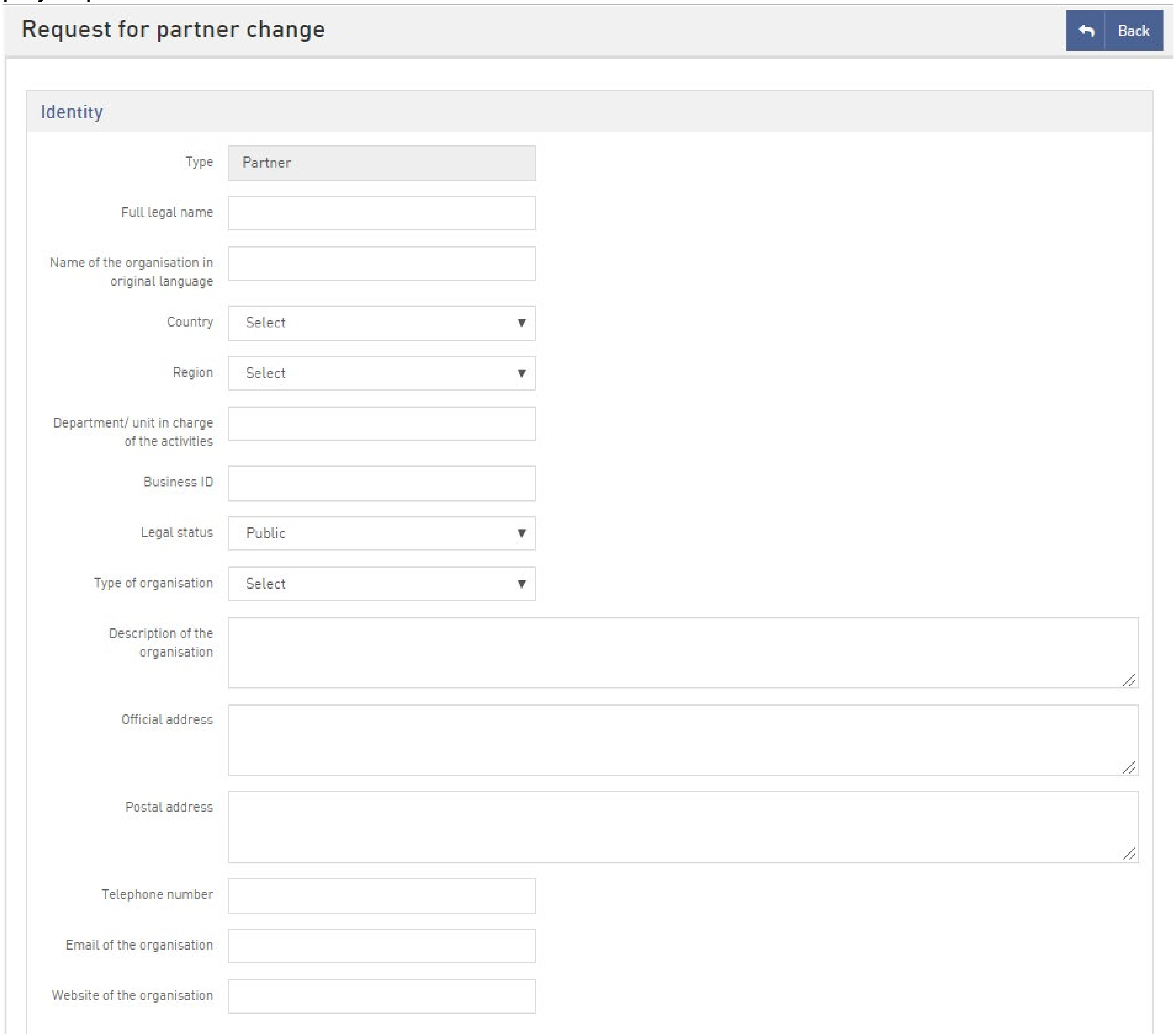
Requests for partner changes which have been submitted but not yet approved by the authority are displayed as follows:

- 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.

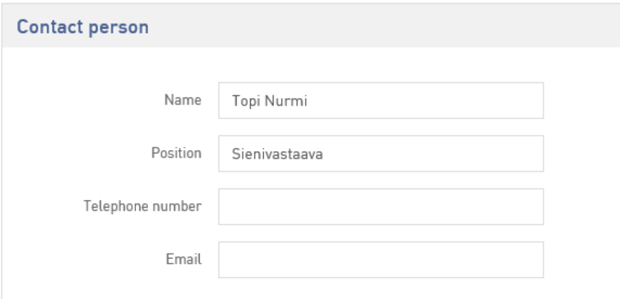


Provide/update following Identity information for the Partner:

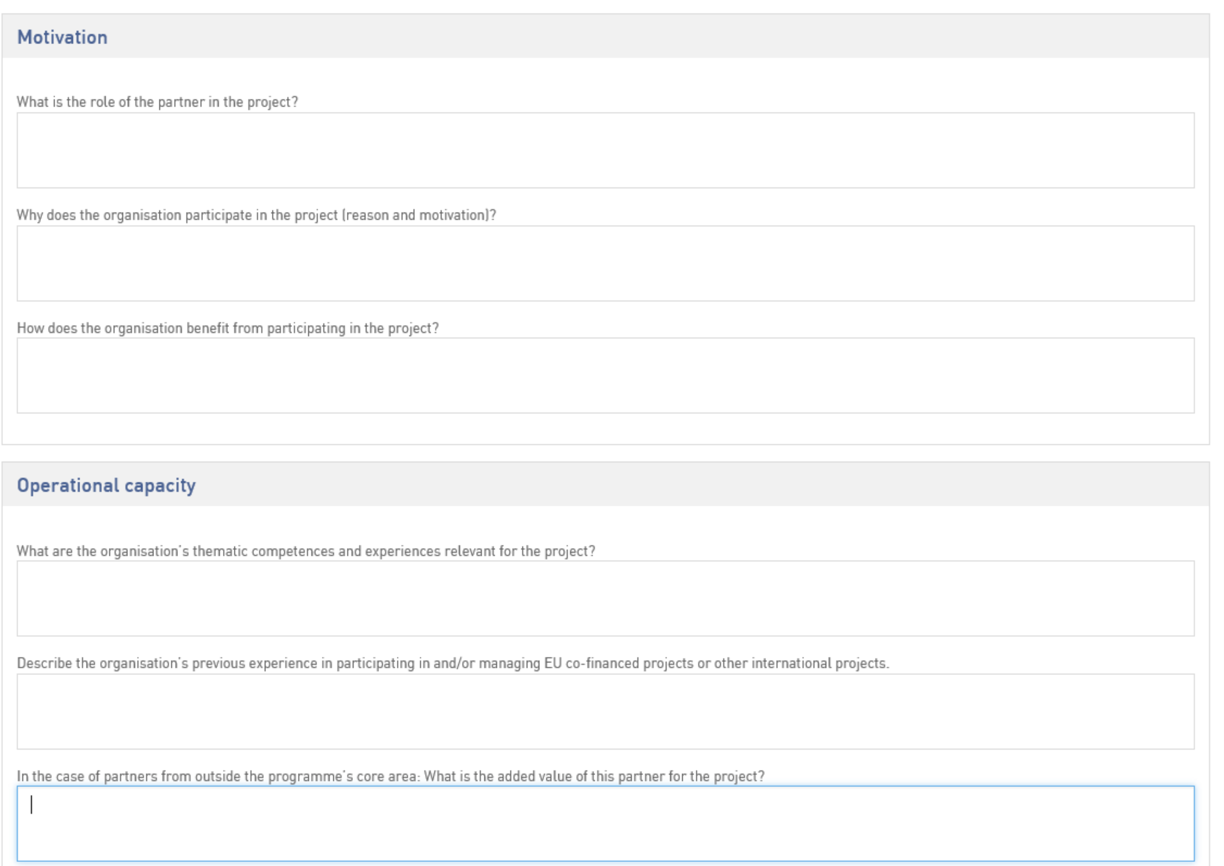
- Type (default from the system)
- Full legal name
- Name of the organization in original language
- Country

- 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

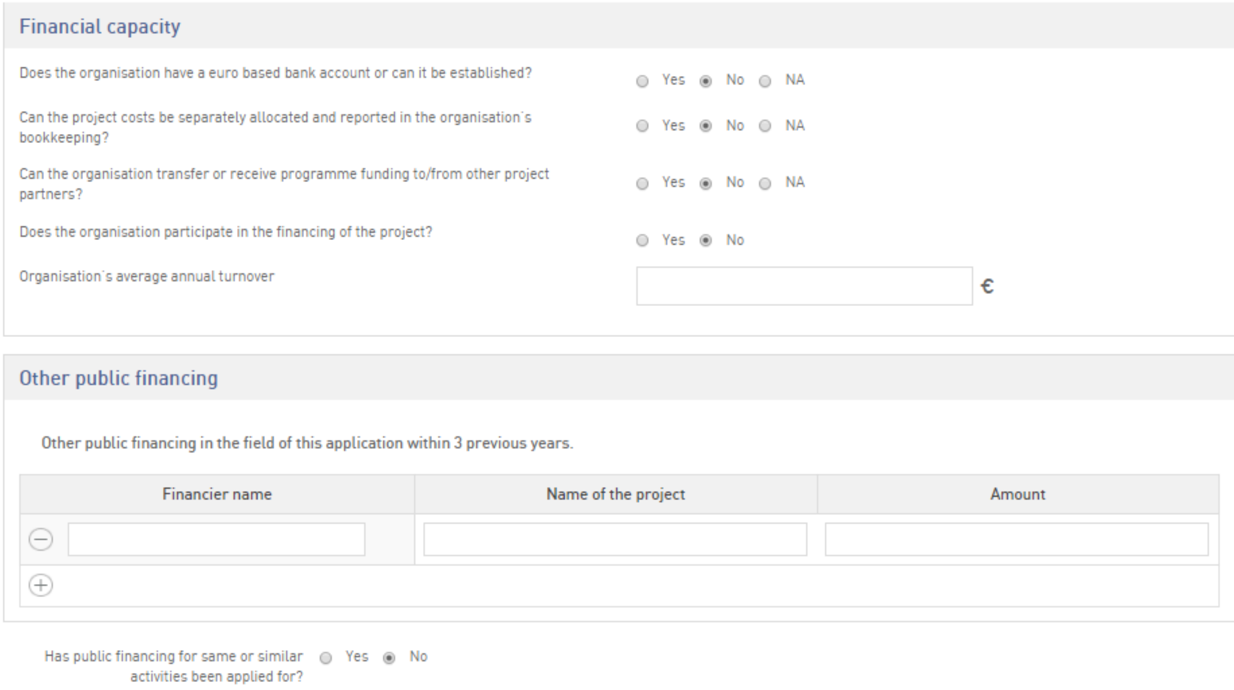
Continue with providing contact person details:



Fill the Motivation and Capacity sections:

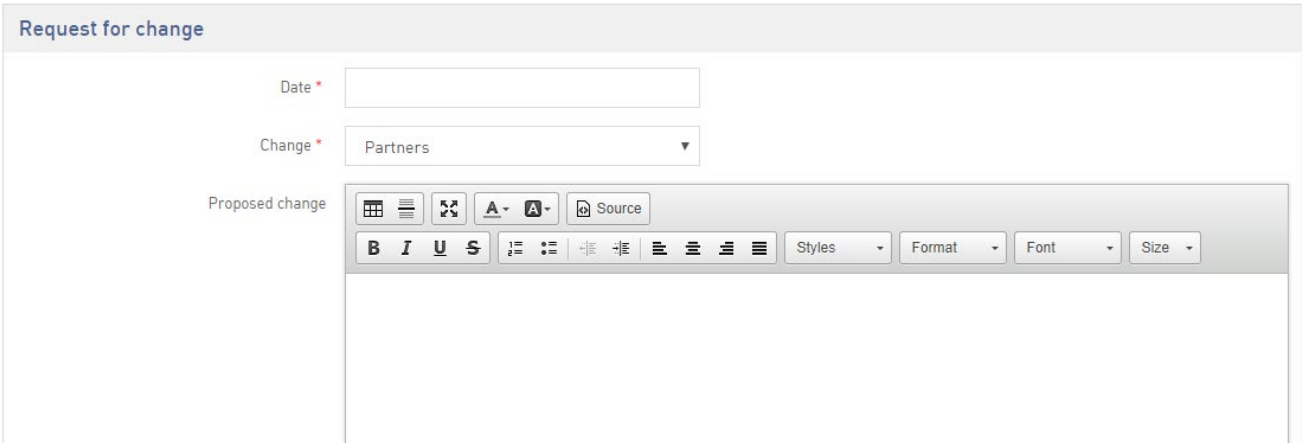


Provide Financial capacity information.



Provide following basic information for the request for partner changes:

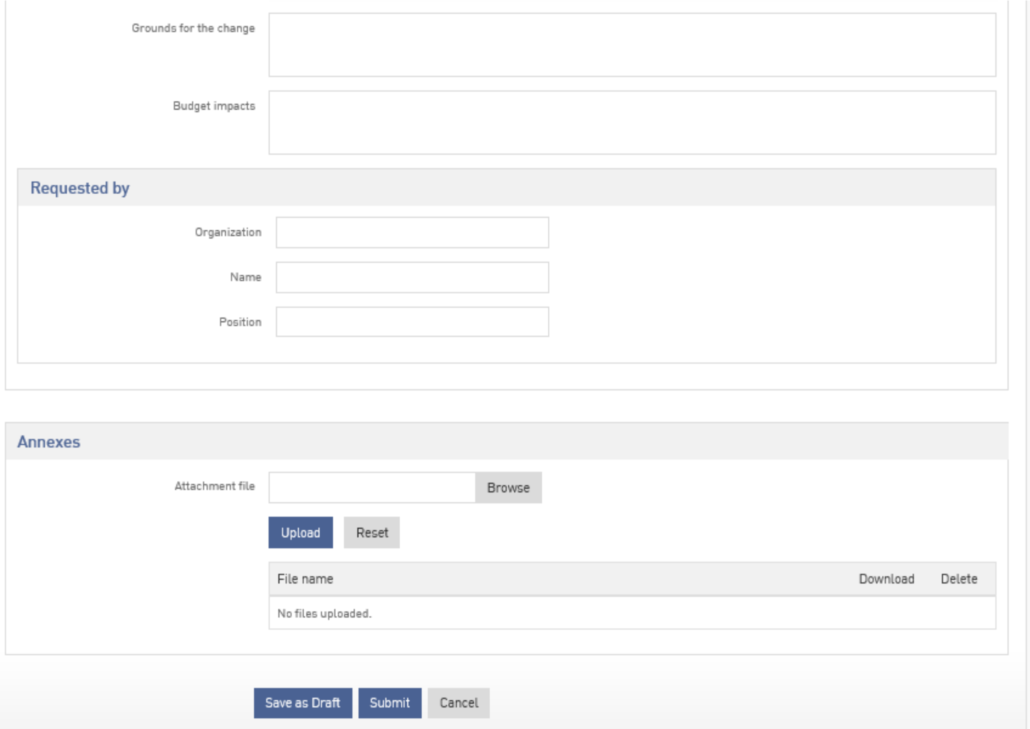
- Date
- Change: default value Partners
- Proposed change



Project partner must also provide:

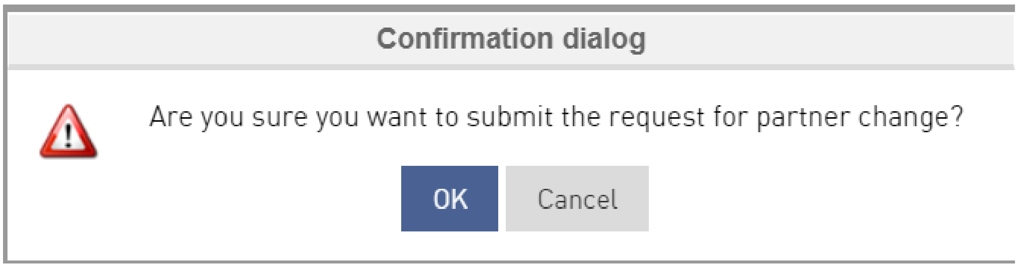
- Grounds for the change
- Budget impacts

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

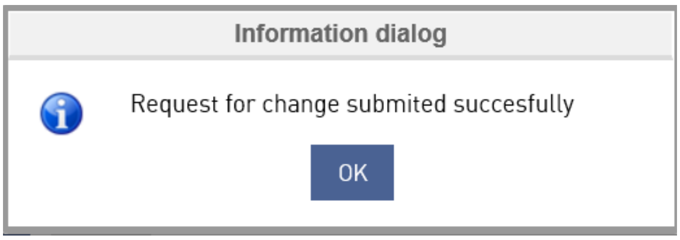


Project partner can also attach attachments to the request for partner change.

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



Press OK.

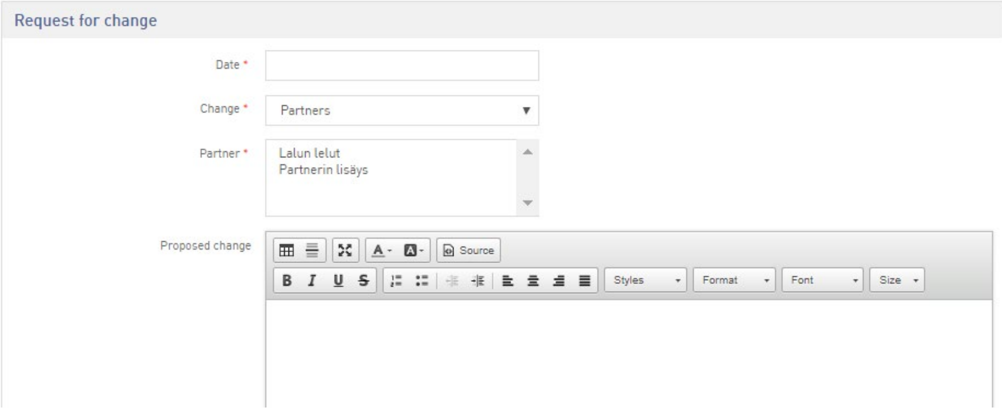


3.2.2 Request for removing an existing partner

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

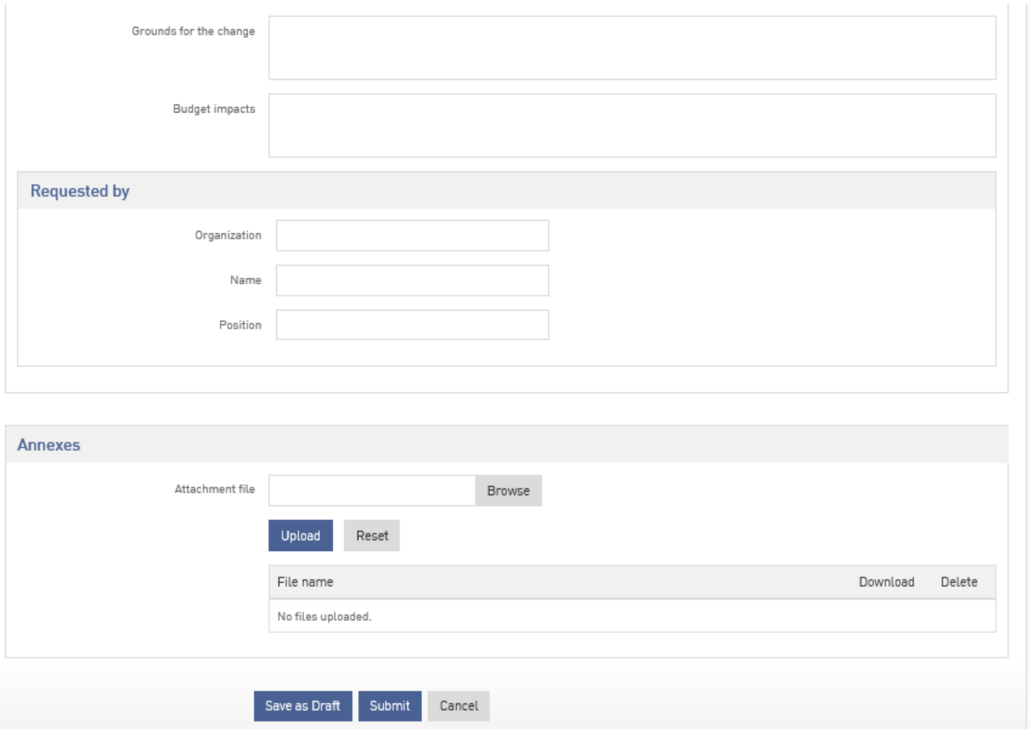


Project partner must also provide:

- Grounds for the change
- Budget impacts

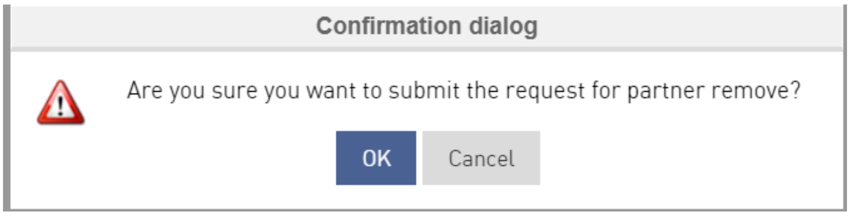
And details of the requestor:

- Organization
- Name
- Position

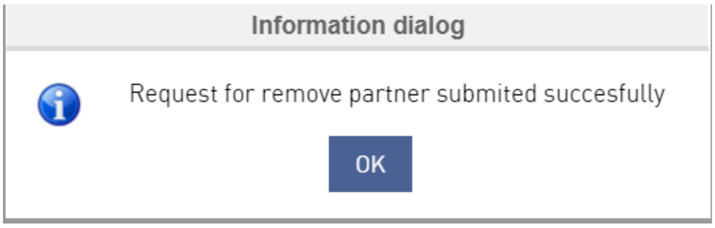


Project partner can also attach attachments to the request for partner removal.

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

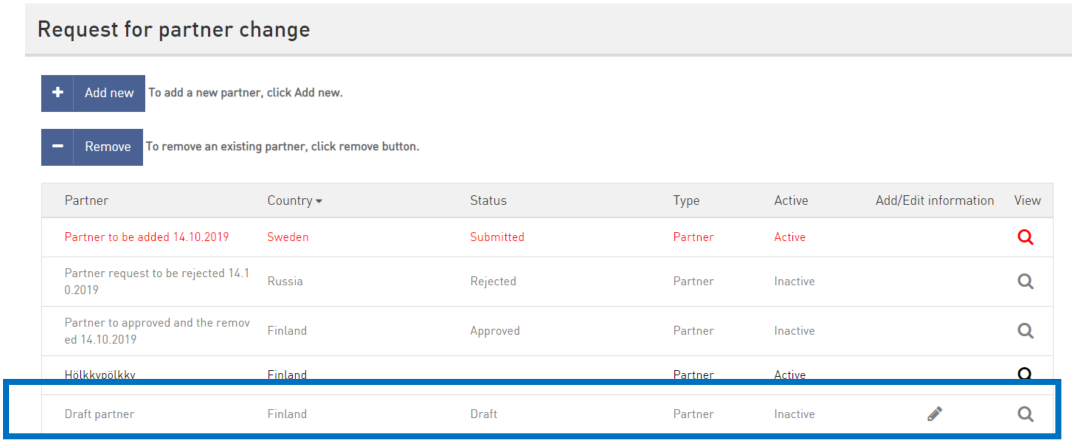


Press OK.

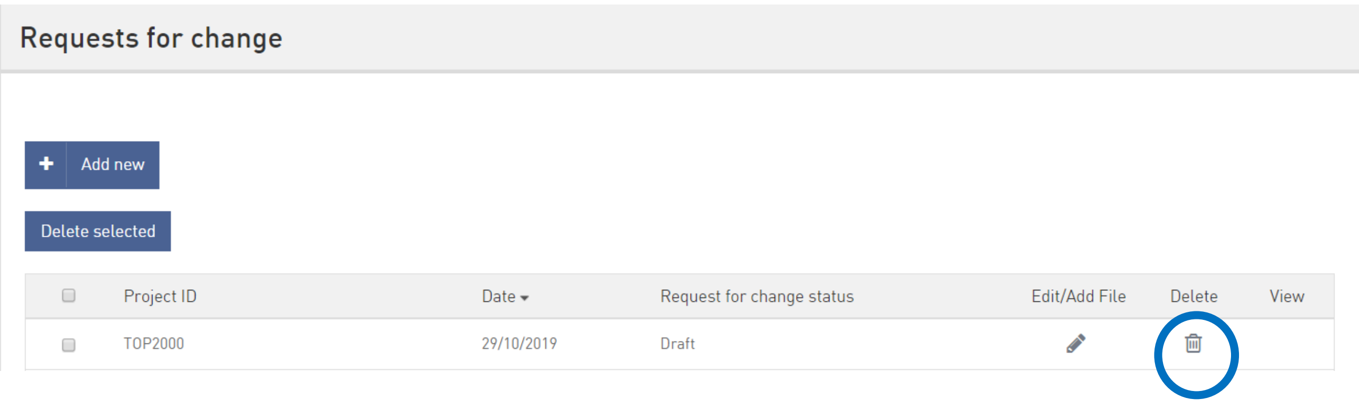


3.2.3 Removing the draft partner request

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

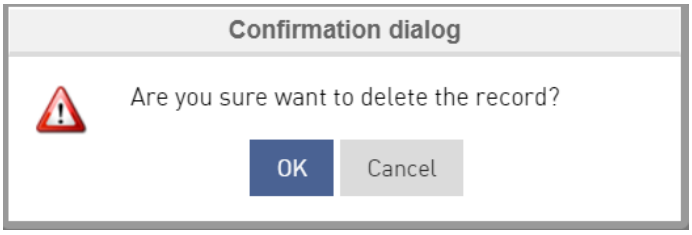


Request for change view:



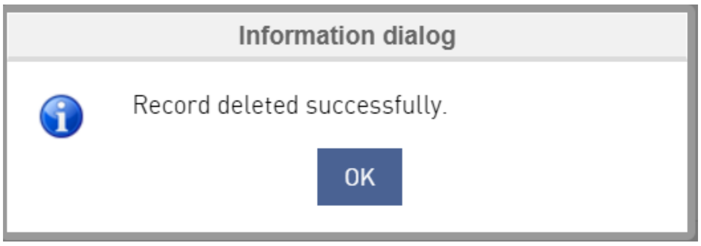
Request can be deleted by clicking Delete icon in the request row.

Promas asks to confirm the deletion:

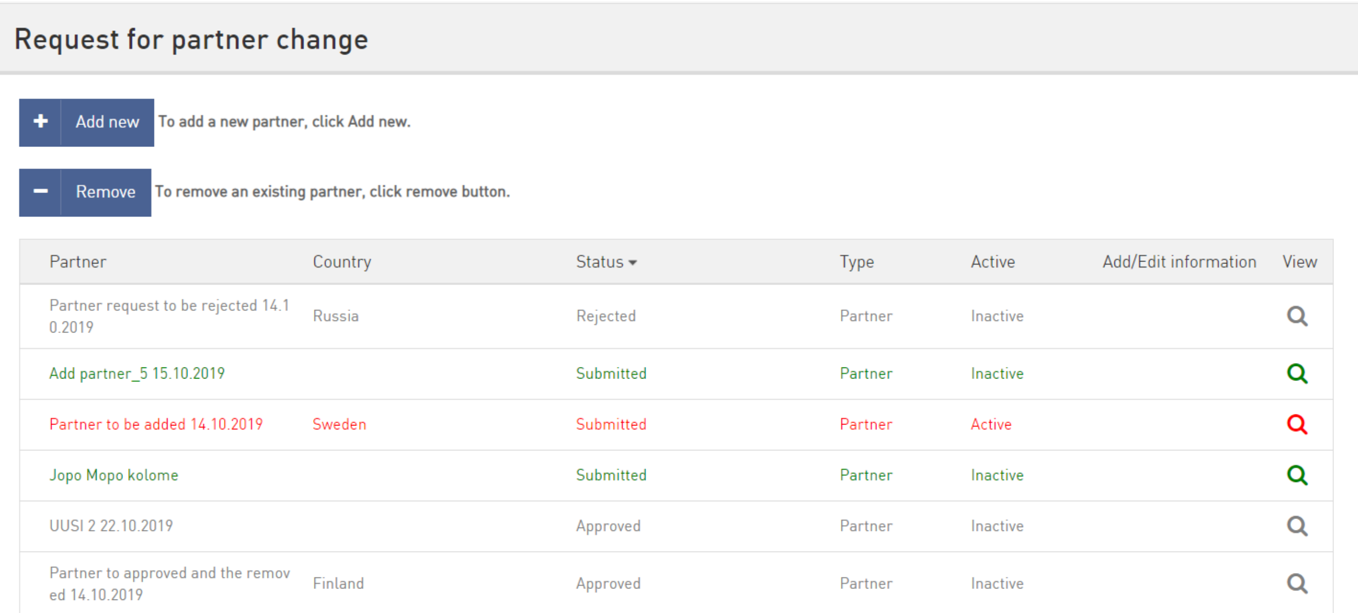


Press OK.

Promas confirms the deletion.

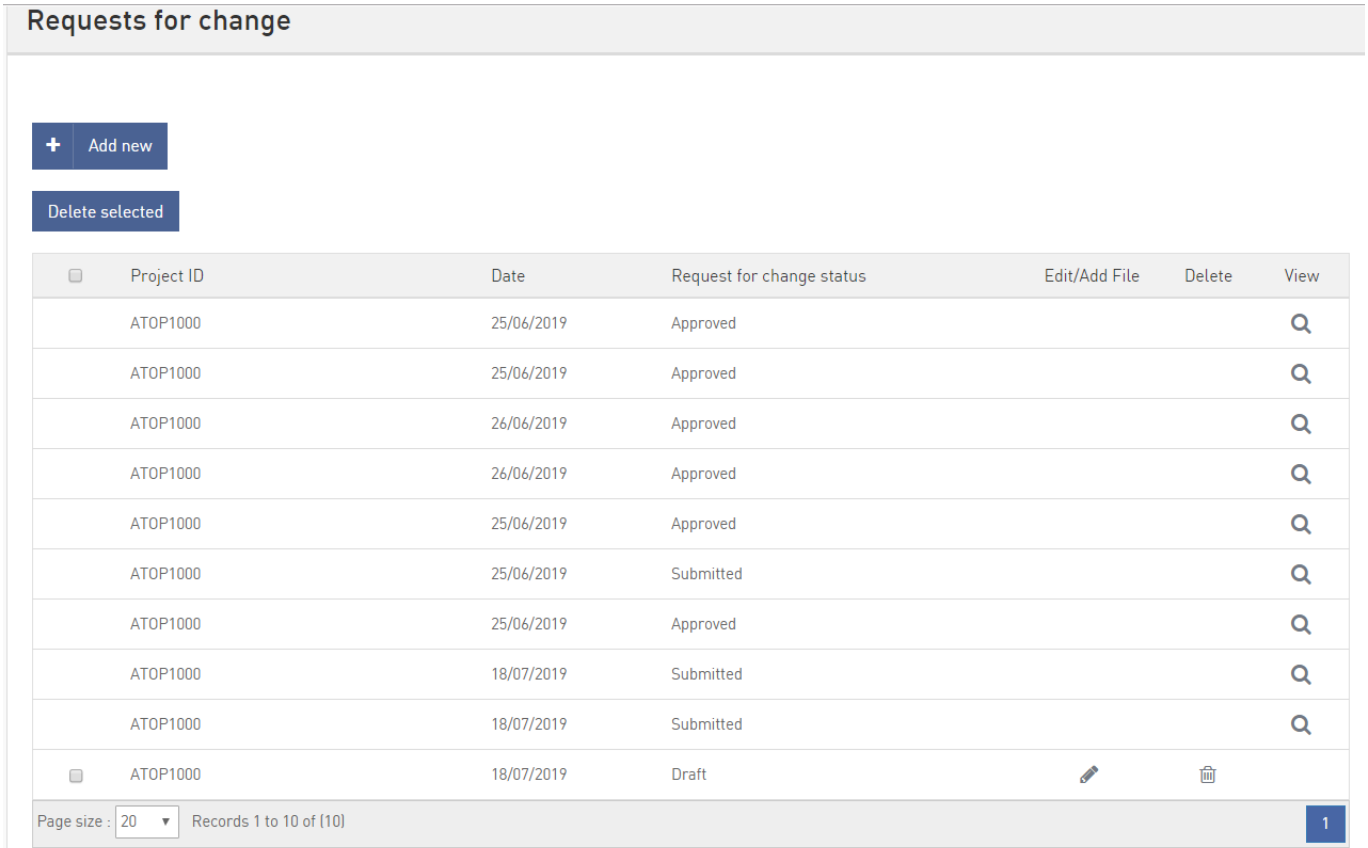


3.2.4 Partner change request decisions by the authority



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.



	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			

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

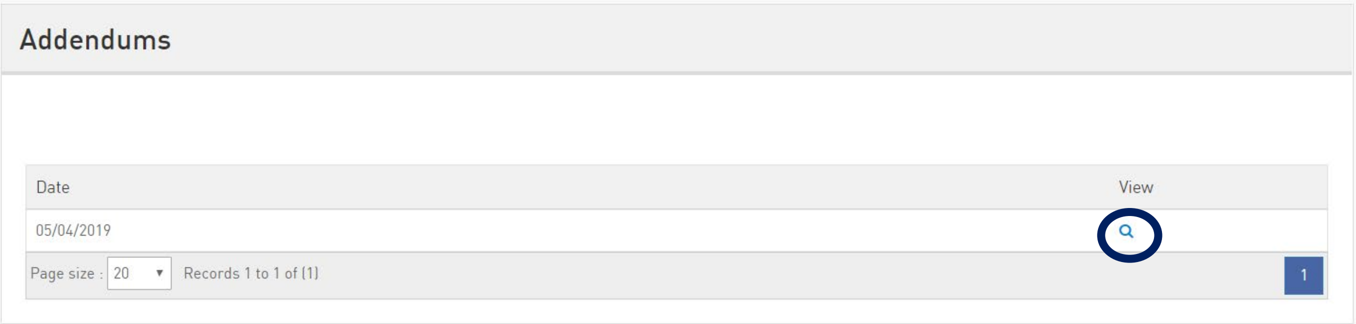
Click View icon for the request that you want to view.

Decision 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

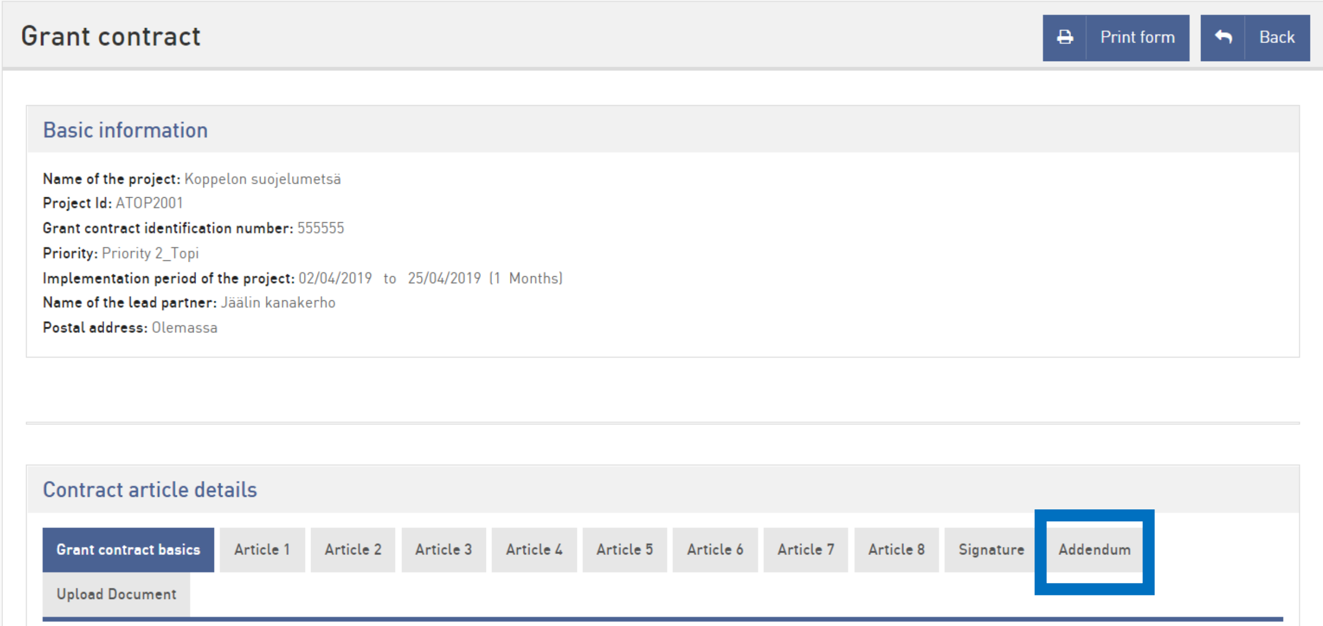
Go to Project management-> Addendums. Addendums page opens:



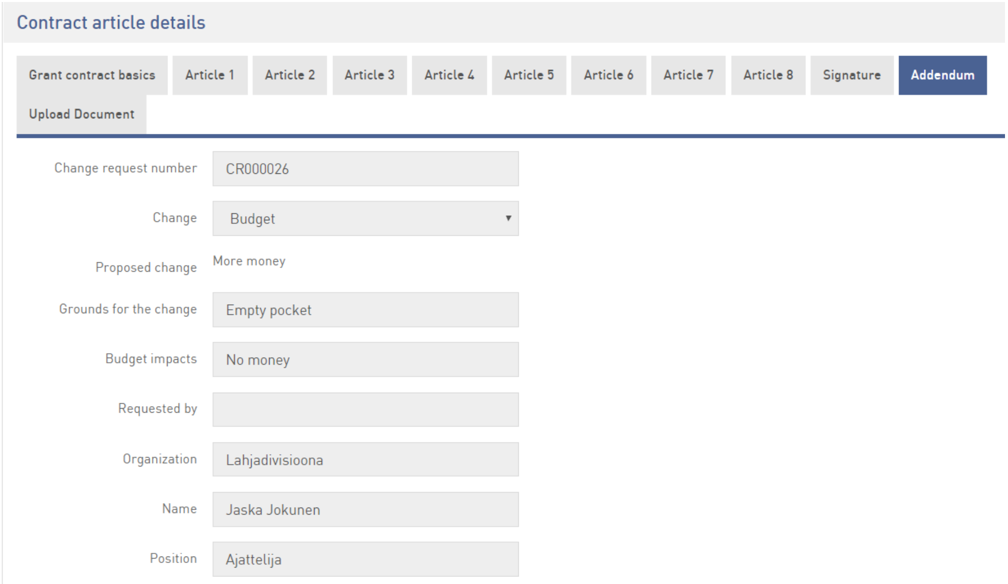
In the Addendums view, the details are displayed as follows:

- Date (approval)
- View

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

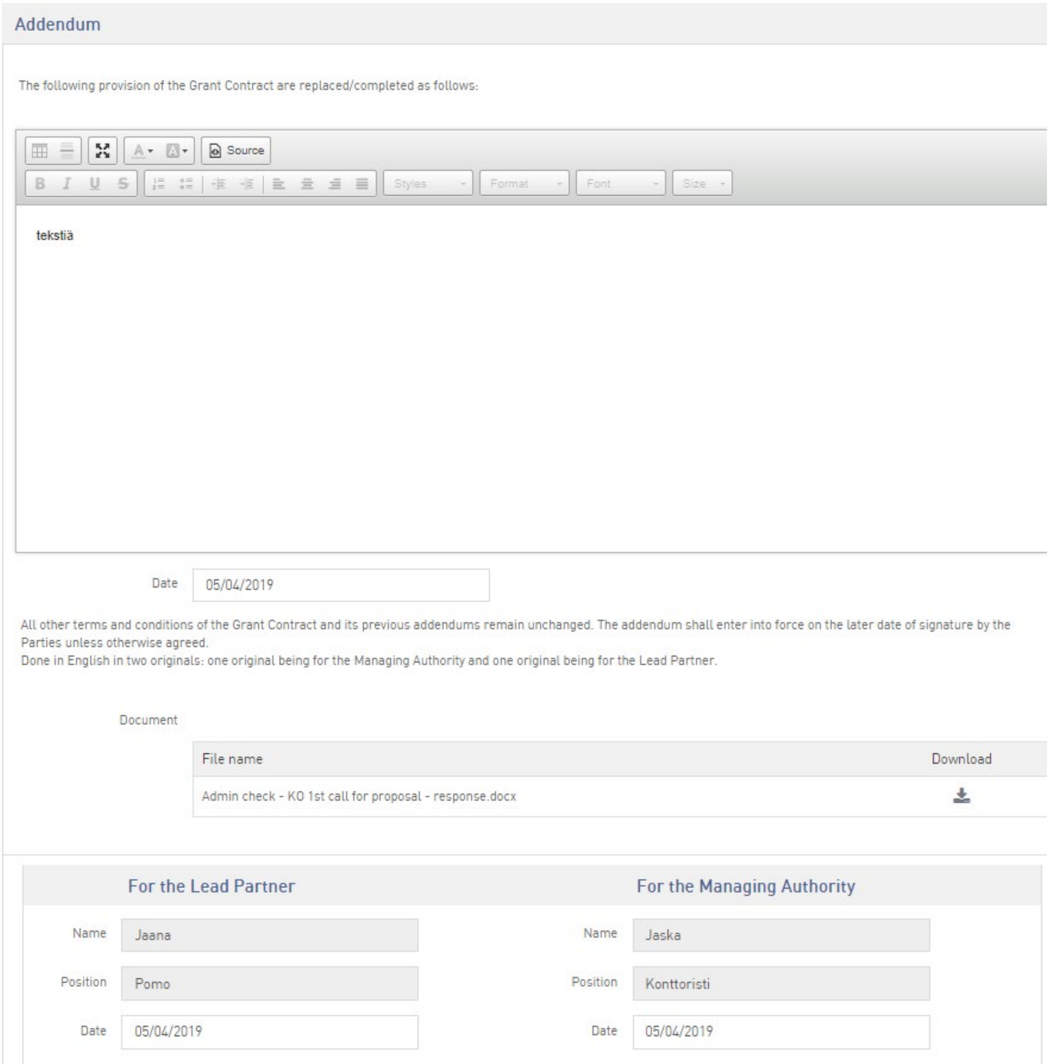


Click Addendum tab. Addendum view opens.



Change request details:

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



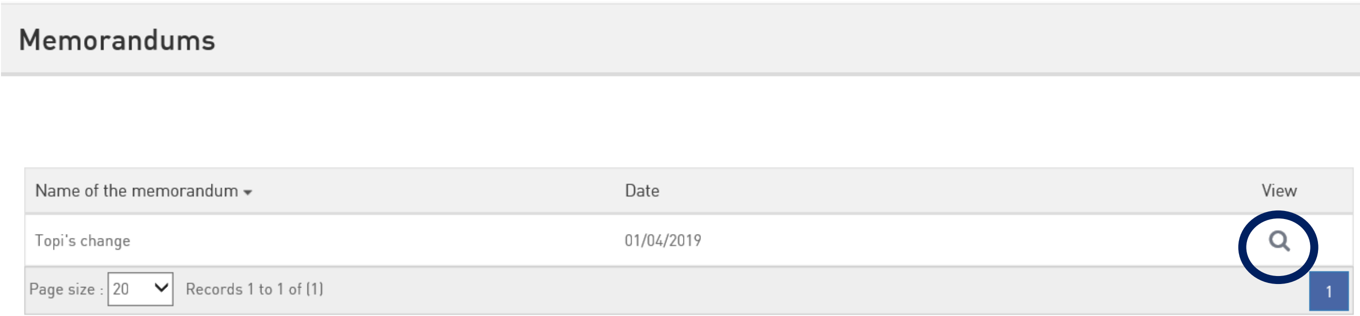
Addendum details:

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

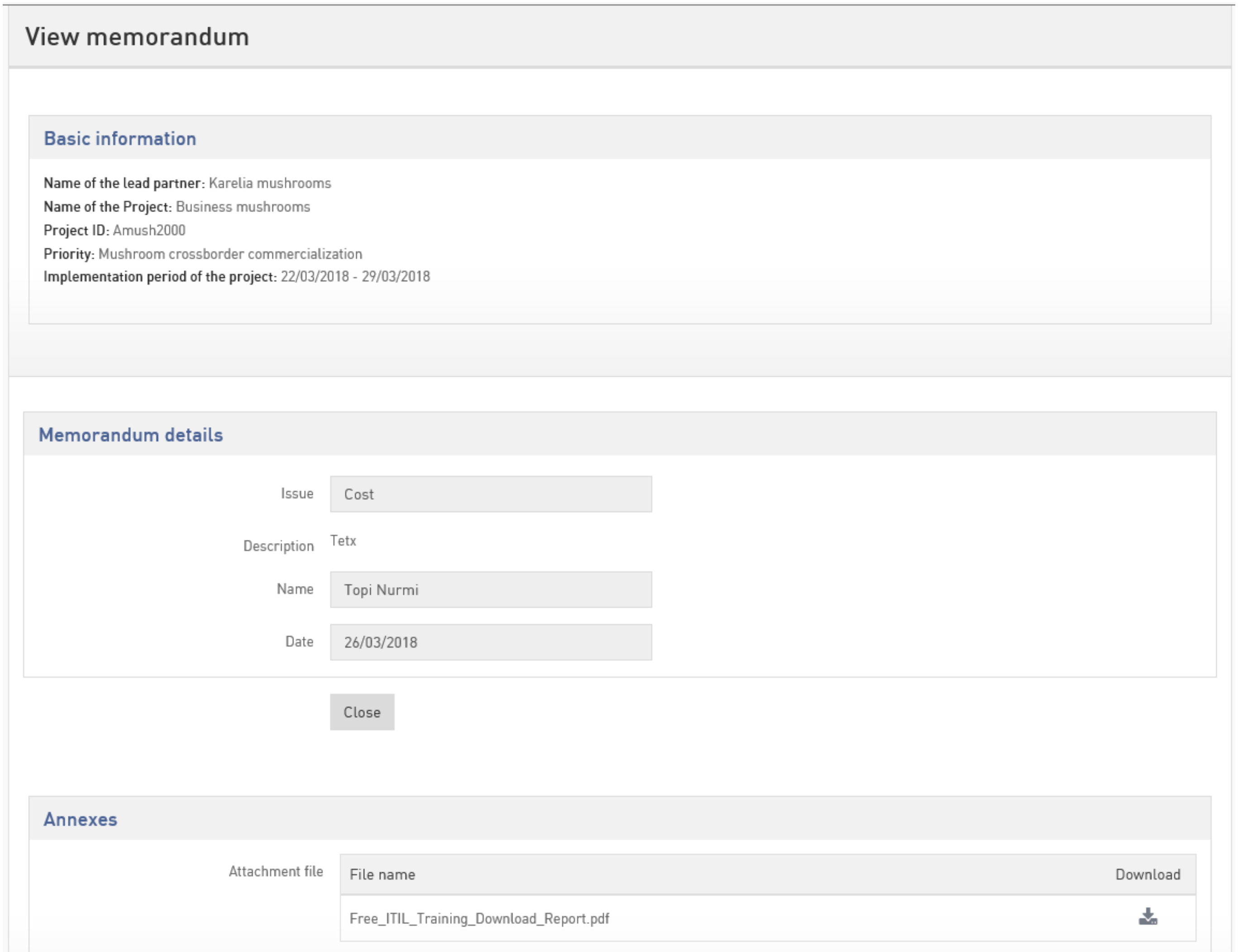
3.4 Memorandum

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

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



Click View icon. Selected memorandum opens.



Following information is displayed.

Project Basic Information:

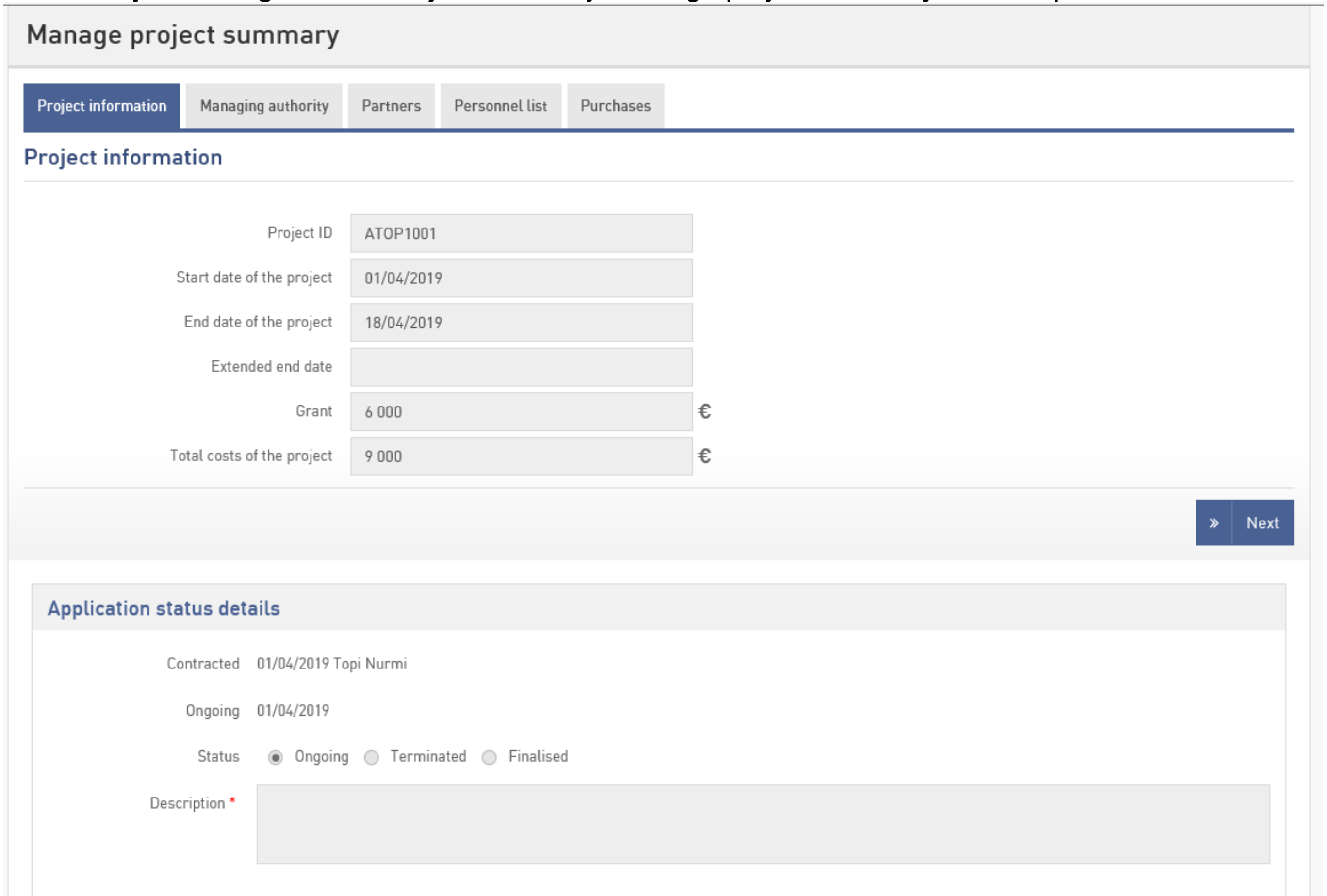
- Name of the lead partner
- Name of the project
- Project ID
- Priority
- Implementation period of the project

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

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

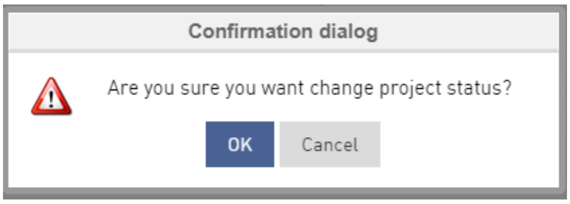
3.5 Project summary

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



Manage project summary 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

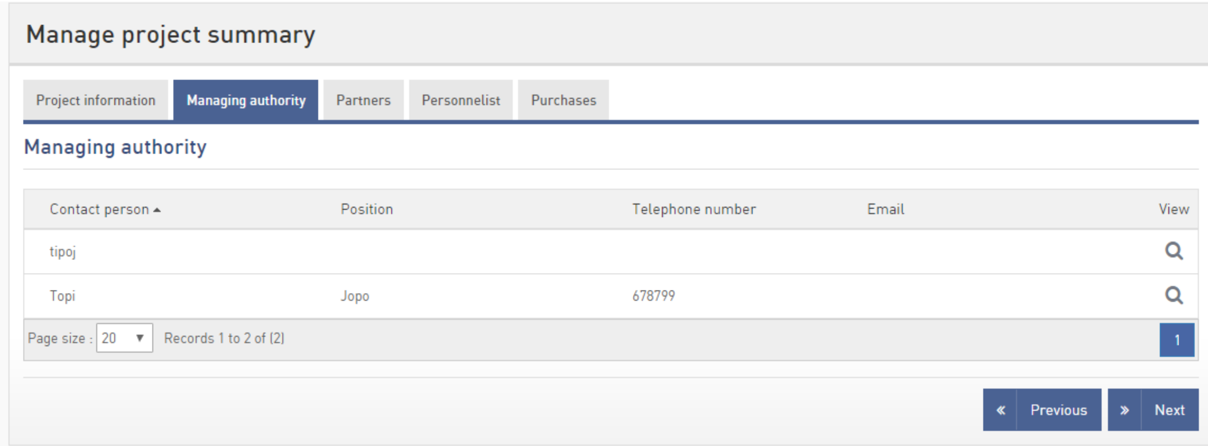


3.5.1 Project information

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

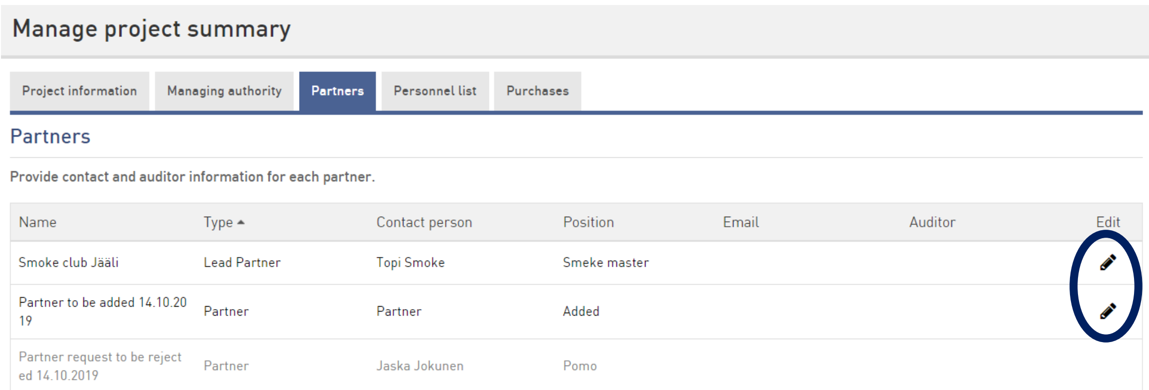
3.5.2 Managing authority



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

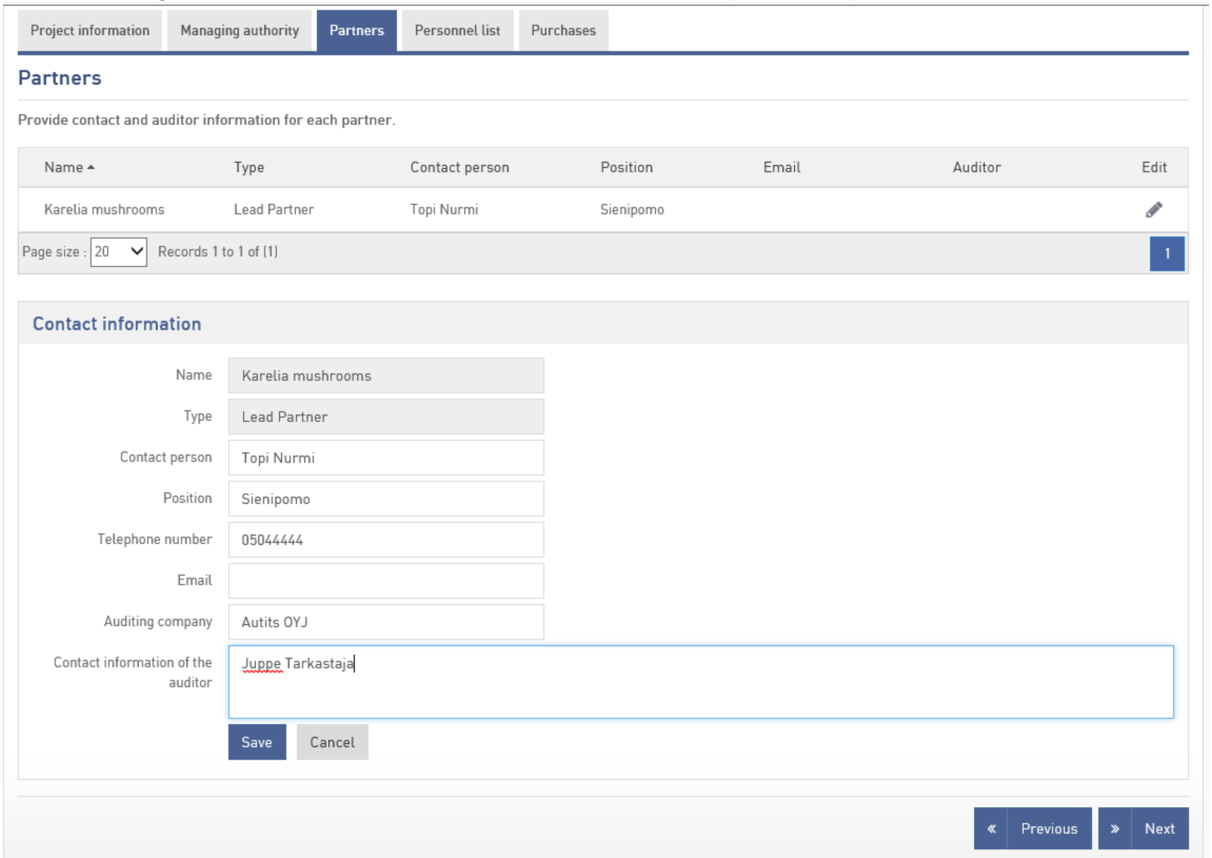
3.5.3 Partners

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.

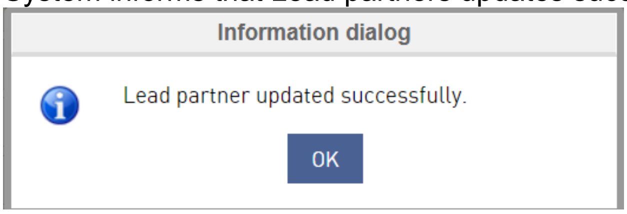


Update/provide following partner information:

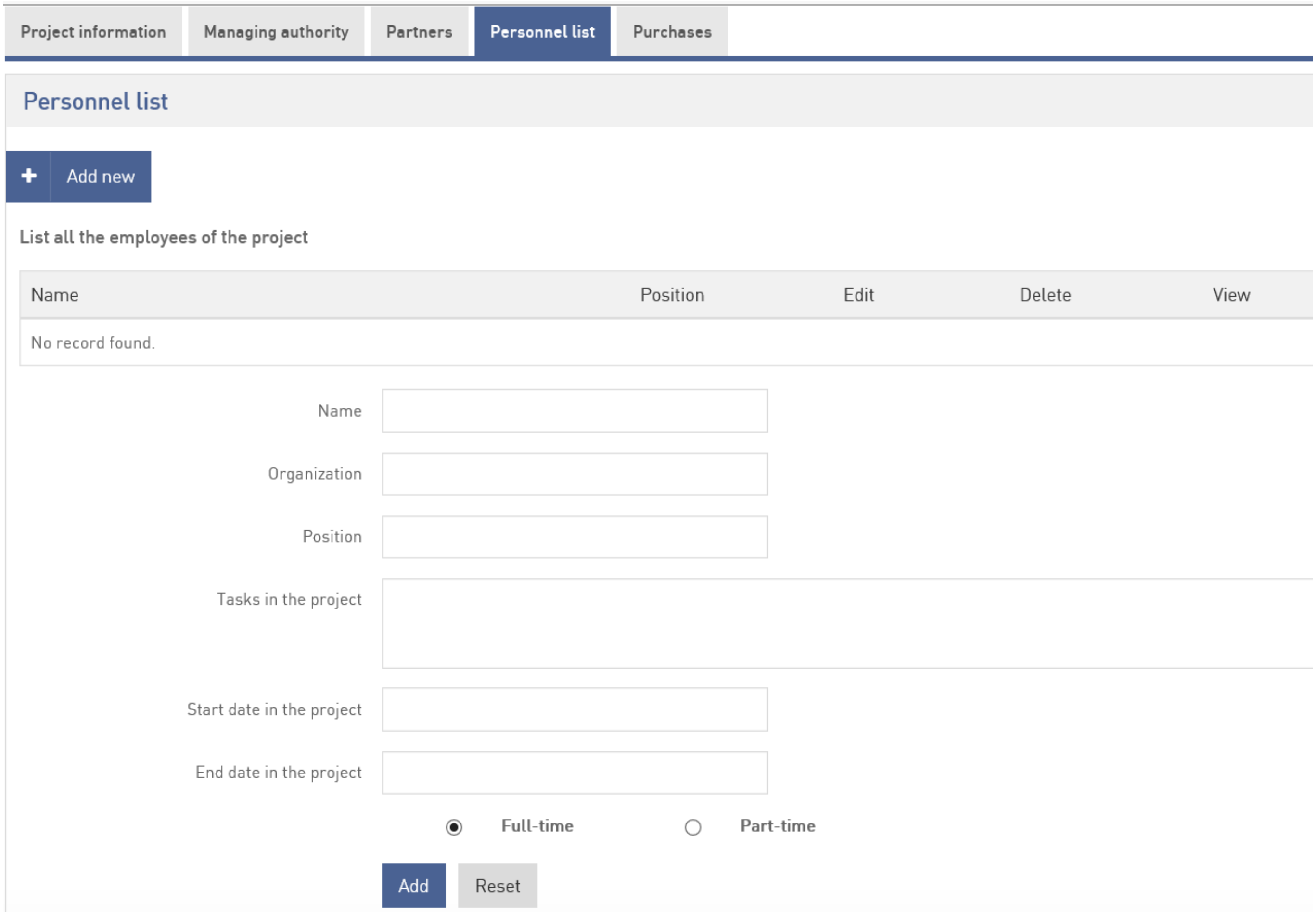
- Contact person
- Position
- Telephone number
- Email
- Auditing company
- Contact information of the auditor

Press Save button to save the done changes and updates.

System informs that Lead partners updates succesfully. Press Ok.



3.5.4 Personnel list

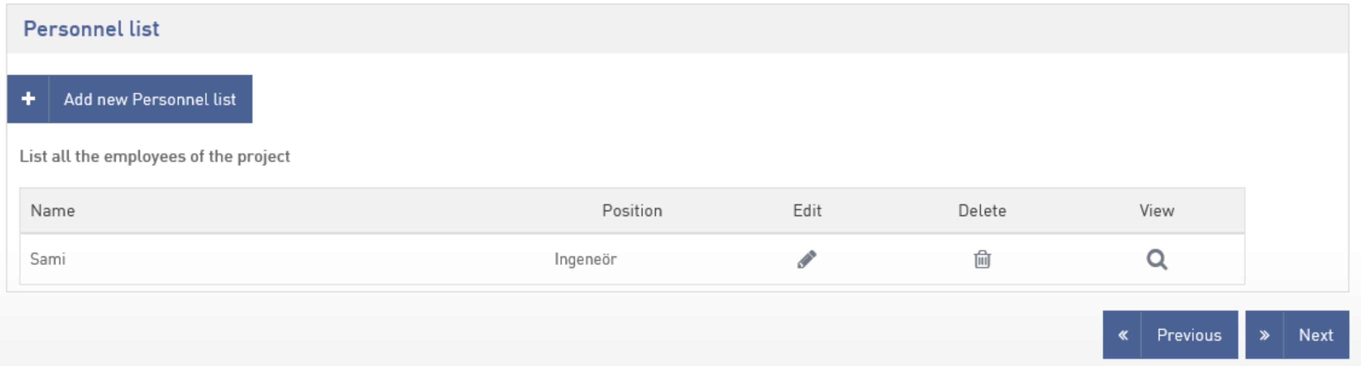


Persons working with the project can be added to the personnel list.

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

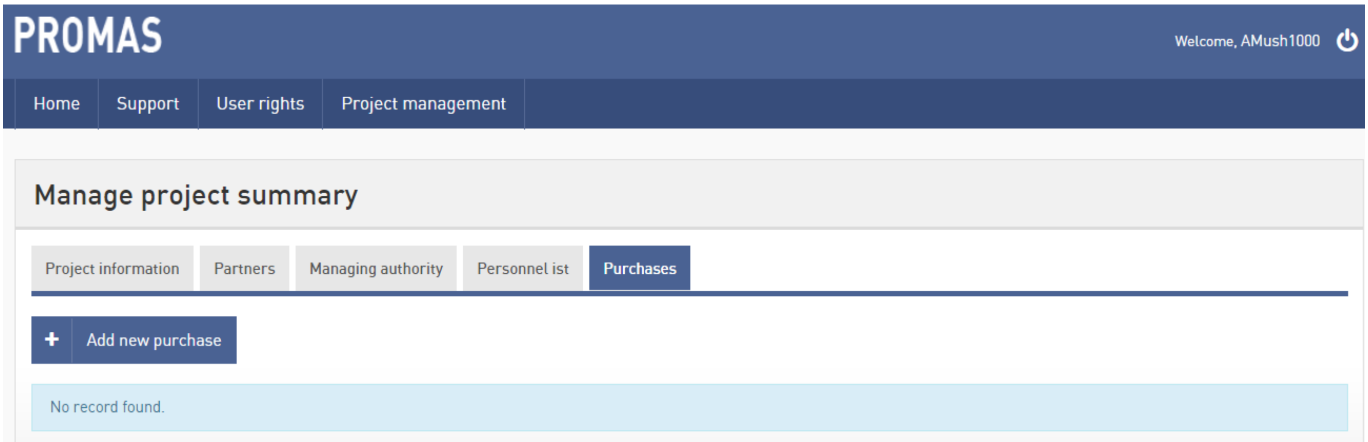
Press Add push button and added person is visible in the personnel list.



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

3.5.5 Purchases

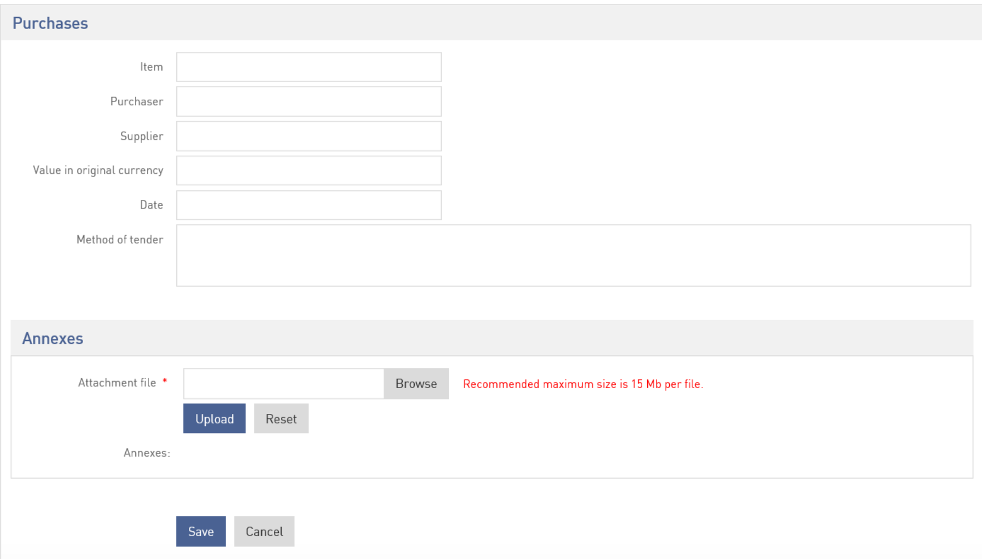
The details of the purchases for the project can be provided via Purchases functionality.



Press Add new purchases push button.

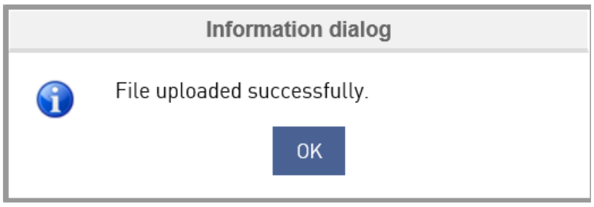
New window opens. Provide the details of the purchase:

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

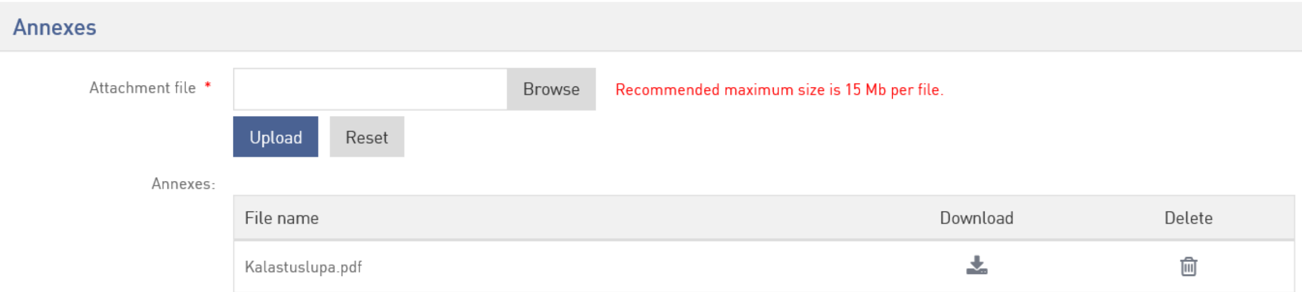


Also purchase related attachments can be added to the purchase.

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.



Press Save push button to save purchase details.

System informs that Purchase successfully saved.

Added purchase item is visible the purchase list.

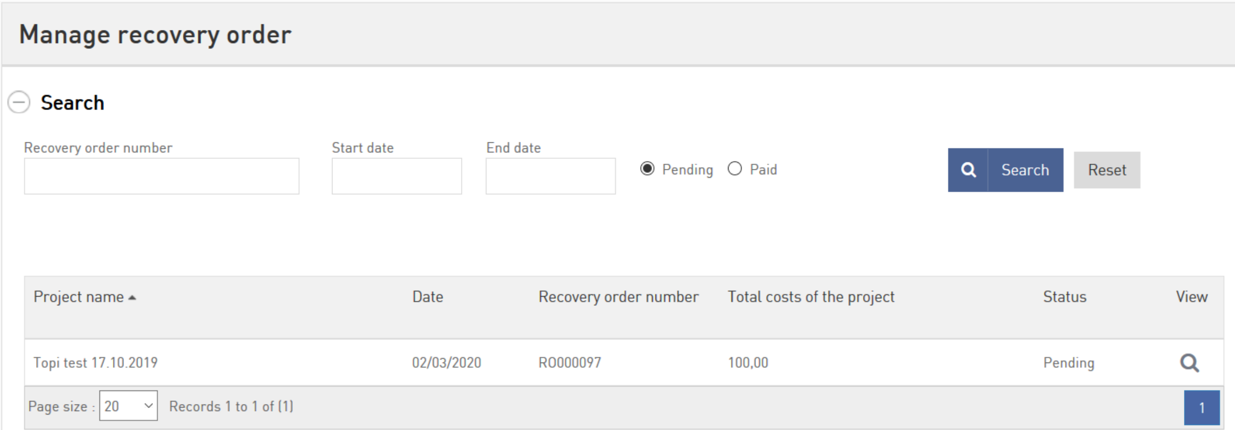
Item ▲	Value in original currency	Date	Edit	Delete
Uistin	122	06/10/2017		

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:



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

- Search functionality

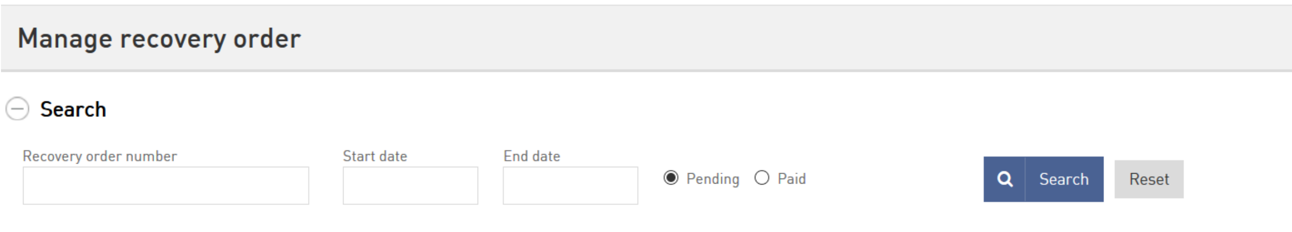
Please note that project partner is able to find recovery order details only if authority has submitted the recovery order, otherwise there will not be any information available in the manage recovery order view. In case the recovery order has been submitted, following details of the recovery order are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



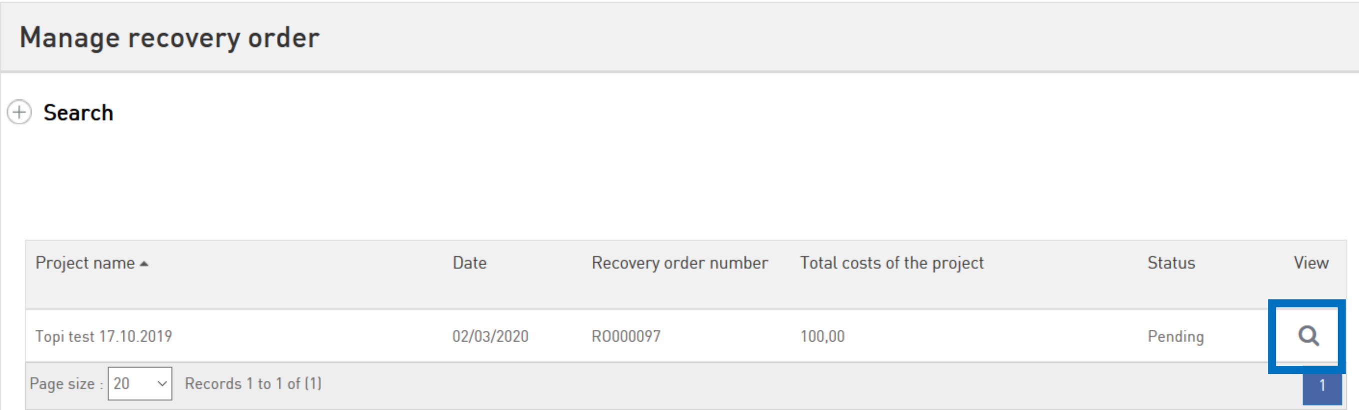
Available search options are:

- 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)

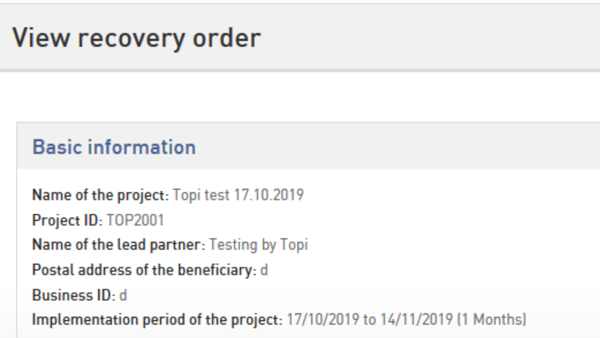
Click Search push button to execute the search. Reset push button clears the given search criteria’s.

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

4.2 View recovery order



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



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	RO000097
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

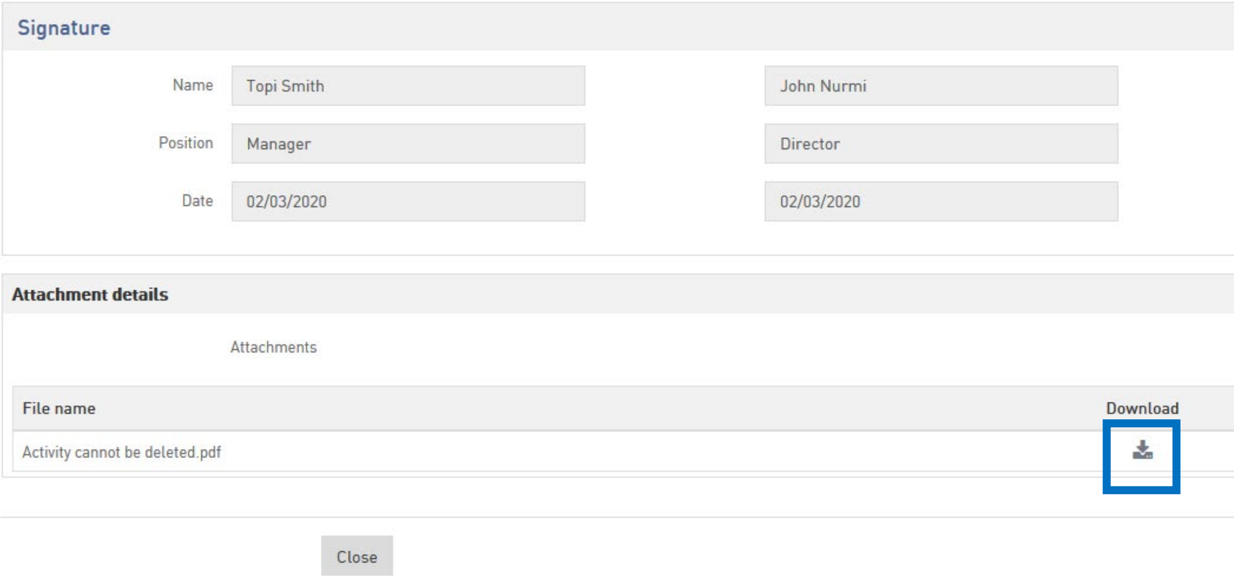
Financier	Amount
European Union _ Topi	1,00
Finland _ Topi	2,00
Russia_Topi	3,00
Sweden_Topi	4,00
Total	10,00

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:



Click Download icon to download the attachment(s).

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

