INTERREG

INTERREG+ IT System

PROJECT CREATION AND CONTRACTING

for

INTERREG VI-A IPA HUNGARY-SERBIA PROGRAMME

User Manual - Front Office

v1.0.0

Version History

Date	Version	Description
11/04/2024	1.0.0	First version for INTERREG+ Project creation and contracting process

Contents

1. INTRODUCTION

1.1 *PURPOSE OF THE DOCUMENT*

The purpose of this document is to assist Lead Partners of the Interreg VI-A IPA Hungary-Serbia Programme in preparation of project creation and contracting process in the INTERREG+ IT system.
The document presents the steps and rules in a process-oriented illustration.

1.2 *WHO IS THIS DOCUMENT FOR*

This document is for the Lead Partners who are required to assist in the project creation and contracting process.

1.3 *ACCESS MANAGEMENT*

The User can access the INTERREG+ IT system at the link provided here: https://husrb.interregplus.eu/21-27.

1.4 *USER ACCOUNT*

The User profiles in the INTERREG+ IT system are managed in so-called User accounts, where each User have their roles assigned, which determines what the User can do in the system and what modules they can use. A Front office User may have only one or several projects or project parts assigned to, where they can manage tasks. It is also possible to hold several roles, such as Recording, Signatory or View to the same User.

To manage the User's account use the 'User' icon ( ) located on the right hand side of the main header (see figure 1). For details on account management and user roles, study the *User-management Manual*.

2. GENERAL REMARKS

In this chapter those functions are presented, which work exactly the same way independently of which form or screen they are on.

2.1 *THE MAIN MENU AND HEADER*

The Main Menu is set in the left side of the Header. The User can find here the available menu items. Whereas in the right side (from left to right) the Period Switch, the Programme information, the Messages, the Language selector, the User Account, and the Sign-out buttons are located. (Fig. 1).

1.INTERREG+ main menu and header

Under the main menu, the Application, the Project data, the Project Report, the user, and the About menu items are.

The Application menu item leads the User to the applications, which were created by them.

The Project data menu item leads to the list of projects the User is associated with.

Under the Project Report menu item, the User finds all Project Reports of those projects, which they are associated with.

The User menu item is to access and manage user role requests submitted by those projects' Partners, which the User is associated with. (Available only for Recording users.) See details in the *User-management Manual*.

The About menu item holds information about the software version of the INTERREG+ IT system.

The Period Switch button allows the User to switch between the 2014-2020 and the 2021-2027 period.

Under the Messages icon the User can see all their system-generated messages; it is the messages centre of the User Account. It is not filtered by Programme or project, all e-mails and internal system-messages ever sent to the User from the system administration are listed here.

The User Account button leads to user account and user role related options, for details see the *User-management Manual*.

2.2 THE 'ACTION' BUTTONS

The 'action buttons' are to manage the process under preparation, they can be found at the bottom of the screen. While the User is actively in the process, they are always visible.

2.The 'action' buttons of the Recording user

3.The 'action' buttons of the Signatory user

When the Users press the **Validate** button, the system checks if all the required fields have been filled in and if the built-in rules have been complied with. If an error or defect is detected, it is listed in the error message showing up at the centre top of the screen. If all mandatory fields are filled and all rules are complied with, a confirming message appears.

By clicking on the **Cancel** button, all recorded and unsaved data will be lost and the BR returns to the last saved state.

The project documents can be generated at any time in the creation process by clicking on the **Generate** button. These documents are for informational purposes only, they do not hold any legal bonds.

The **Task comment** button leads to a text area, where comment can be recorded. It is mandatory when you want to send the process back for further editing, see Back to modification button.

The **Back to modification** button allows the Signatory user to send the project back for further editing if it is necessary. The Back to modification button requires the Task comment to be filled beforehand.

To save the recorded data and leave the process (close the window) click on the **Continue later** button. By doing so, all data will be saved with no validation running. The User can return to the process from the project list screen by clicking on the **Continue** button after selecting the project in question (*see chapter 3.1.1*).

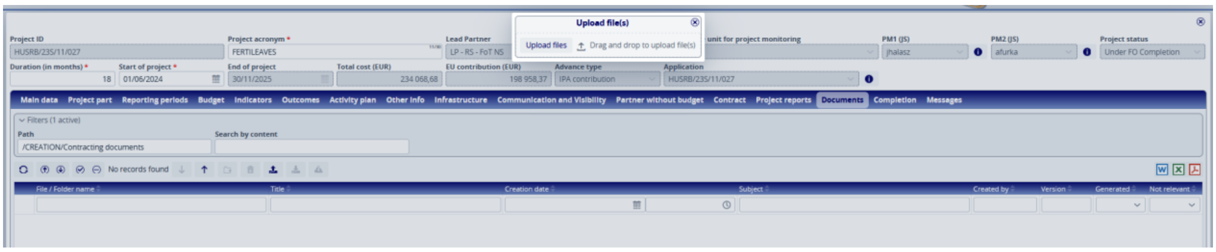
By pressing the **Send for signature** button, the process will proceed to the next step. The validation will run automatically and if the program does not detect any deficiency or violation of the rules, the task moves to the Signatory user. The project is no longer editable to the Recording User.

The **Sign** button is available only for the User holding Signatory user role. This button initiates the submission process; the project will be submitted to the JS Programme Manager for evaluation.

2.3 THE 'FUNCTION' BUTTONS

The so-called 'function' buttons are those, which always call the same functions:

- the (**+**) button always initiates a new form generation, such as a Contact person or a Bank account form;
- the (**View**) button initiates the viewing of a selected list item (e.g. Contact person or Bank account form, etc.);
- the (**Modify**) button initiates the modification of an already existing list item (e.g. Contact person or Bank account form, etc.);
- the (Delete) button deletes the selected list item. *Note, if an item is deleted it can no longer be restored! Also, only items recorded in the current step can be deleted!;*
- the (**Upload**) button initiates a pop-up communication panel, where the User can either browse among the files on the computer or just simply drag and drop even multiple files at once. The upload button is usually placed in forms.



4.Upload file(s) communication panel

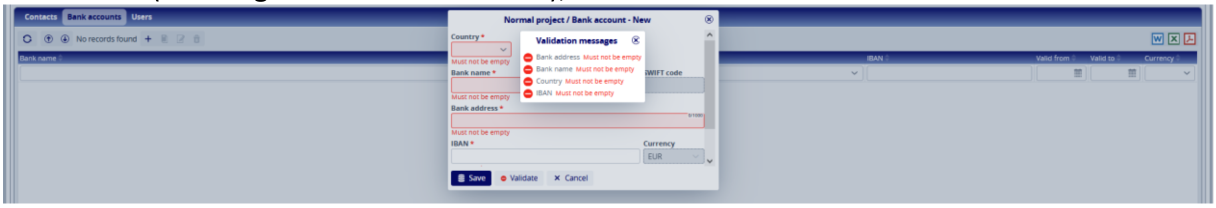
- the (Download) and (Download as zip) buttons allow downloading even multiple selected files from the list at once or as a zip file;
- the (**Export to**) buttons initiate exporting the content of the list screen into the selected format (xlsx, docx, pdf). *Note that using the function would export only the visible content of the screen list. If a screen is expandable remember to expand it, otherwise the hidden content will not be exported!*
- by the (**info**) button the details of a field can be viewed, such as Application, which leads the User to the initial application.

2.4 MANDATORY FIELDS AND RULES

Most of data fields are mandatory, they are marked with a red asterix (*). These fields hold essential information about the project.

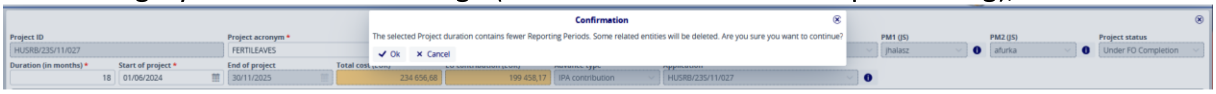
There are numerous rules governing the project creation process, in order to ensure compilation with these rules, built-in validation routines run in the background, which constantly check if the provided data is in line with the rules. In case of any violation, the system informs the User in a pop-up error message. Depending of the nature of the issue, the message may be:

- red (blocking error – must be fixed);



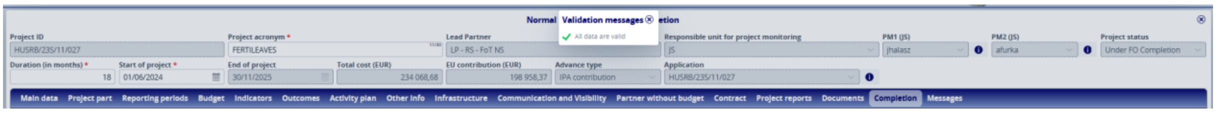
5.Blocking errors

- or grey confirmation message (must be confirmed before proceeding);



6.Confirmation message

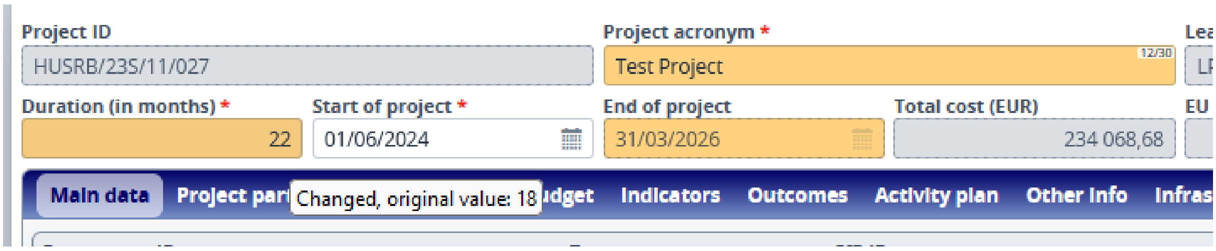
In case the validation does not detect any irregularity, a positive validation message appears.



7.Positive validation message

2.5 INDICATIONS OF MODIFIED VALUES

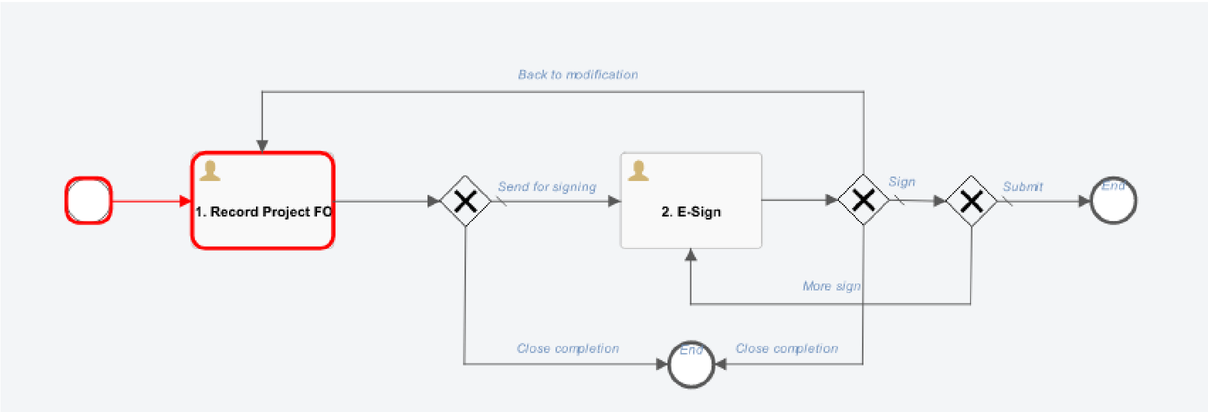
During the process, modifications may be inevitable in order to create a proper project. To assist the User, such modifications are highlighted with yellow. By positioning the cursor over the modified field in question and holding it still, an info bubble will appear with the original value of the field.



8.Indication of modified values

3. THE CREATION AND CONTRACTING PROCESS

The project creation and contracting process is controlled by a complex workflow engine, where the different tasks are broken down to steps, and route connections between steps are predefined and strictly allowing one-way traffic.
The Front Office process consists of two distinct steps; it is summarized in the figure below:



9.The Front Office workflow of the process

1. Record project FO step: project-level Recording User is authorized to record and edit data of the project.
2. E-sign: After recording, the project-level Signatory User is entitled to endorse (E-sign and submit) the project to the JS or return it back for further modification (Back to modification) to the Recording User. In this step, the project is not editable. After the last signatory endorsement (in case of more than one valid Signatory user), the project is submitted and added to the Back Office interface. The submission is the condition of all the Signatory Users’ e-signature.

Projects are status-managed allowing the User to keep track of the progress of their life-cycle. The possible statuses are as follow:

- Under creation: the project is under evaluation at Joint Secretariat;
- Under FO completion: this status indicates that the project is at the Front Office;
- Waiting for Approval: the project is under approval at Joint Secretariat;
- Under MA check: the project is under evaluation at the Managing Authority;
- Under MA check: the project is under approval at the Managing Authority;
- Under contracting / under signature: the project is approved, waiting for the contract to be prepared / signed by all Parties;
- Contracted: the project is contracted.

3.1 RECORDING, EDITING PROJECT DATA

During the creation process the project is at least once sent to the Lead Partner (for completion) for recording mandatory missing data, such as project-level Contact persons and project bank account. Also, to check the content of the project and edit/update any data imported from the approved application, if necessary.

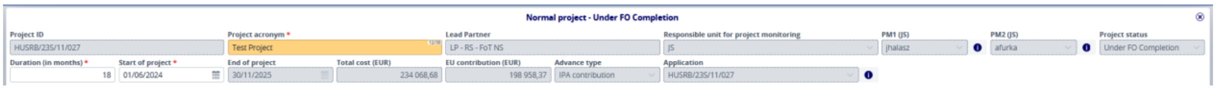
3.1.1 The project list screen

On the project list screen, all projects the User is associated with appears in rows, with their most fundamental data in columns.
Above the list of projects, the 'function buttons' are located. To activate them, the User needs to select a project from the list and click on the function button according to their intention.

10.The project list screen

3.1.2 The project header

The project header displays the most important information of the project, such as project ID, acronym, Programme managers, project dates, and costs.

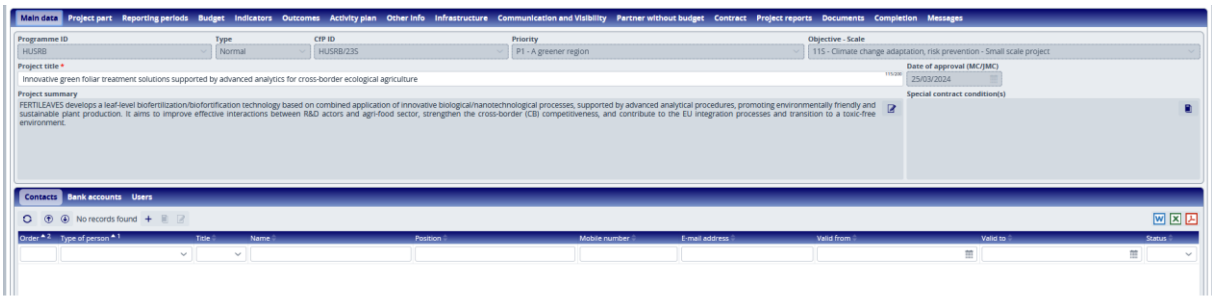


11.The project header

Here the project acronym, the start date of the project, and the project duration can be modified, if necessary.

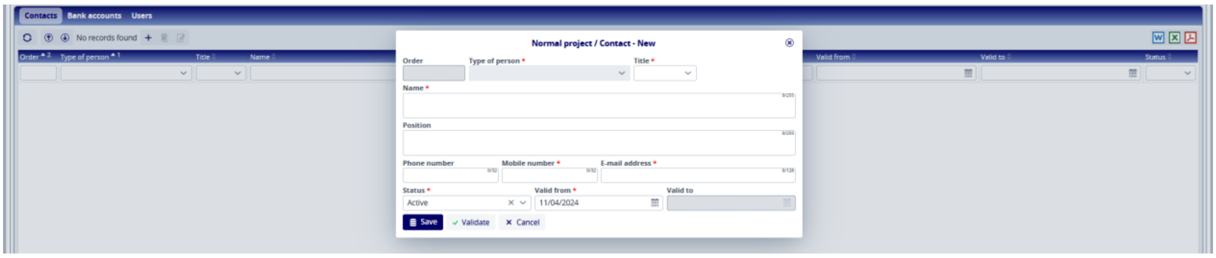
3.1.3 Main data

Under the main data tab, further descriptive information of the project is located. Below this section, there are three subtabs.



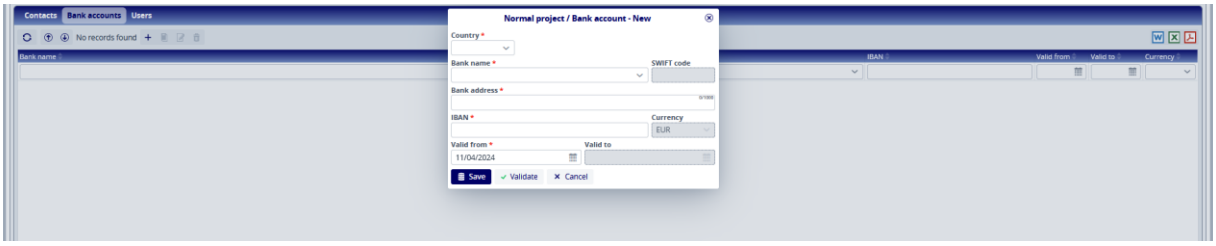
12.Main data

3.1.1.1 Under the Contacts subtab, the User must provide a project-level contact person and at least one legal representative person of the project. The process can be initiated by the **+** (Add) button. After filling in all mandatory fields, the form must be saved by the Save button.



13.Contact form

3.1.1.2 Under the Bank accounts subtab, the User must provide the bank account information dedicated to the project. The system checks if the IBAN number is valid and is corresponding to the country selected (the country of the Lead Partner). The process can be initiated by clicking on the + button. After filling in all mandatory fields, the form must be saved by clicking on the Save button.



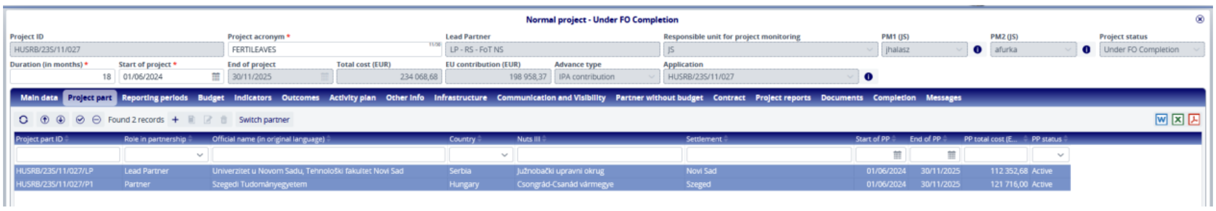
14.Bank account form

3.1.1.2 Under the Users subtab, the users associated with the project are displayed. This tab is only to display information – the user cannot edit its content! For user management, see the *User-management Manual*.

3.1.4 Project part

Under this tab, information about the project partners can be found, such as Partner information, Budget, etc. This tab is nearly identical to the Applicants tab on the application, for further information see the *Application User Manual*.

There is one important addition, the **Switch partner** button. This can be activated by selecting two partners from the list. By clicking on the button, the two selected partners will be switched in position and in roles (in case one of them was the Lead Partner).



15.The Switch partner button

3.1.5 Reporting periods

Under this tab, information about the project's Reporting periods can be found. This tab is only to display information – the user cannot edit its content! This tab is nearly identical to the one on the application, for further information see the *Application User Manual*.

3.1.6 Budget

Under this tab, information about the project's Budget can be found. This tab is only to display information – the user cannot edit its content! The Budget of the individual Partners can be accessed through the Project part tab. This tab is nearly identical to the one on the application, for further information see the *Application User Manual*.

3.1.7 Indicators

Under this tab, information about the project Indicators can be found and edited; its content can be modified, if necessary. This tab is identical to the one on the application, for further information see the *Application User Manual*.

3.1.8 Outcomes

Under this tab, information about the project Outcomes can be found and edited; its content can be modified, if necessary. This tab is identical to the one on the application, for further information see the *Application User Manual*.

3.1.9 Activity plan

Under this tab, information about the project Activities can be found and planned; its content can be modified, if necessary. This tab is identical to the one on the application, for further information see the *Application User Manual*.

3.1.10 Other info

Under this tab, information about the project Questions can be found and provided; its content can be modified, if necessary. This tab is identical to the Project description tab on the application, for further information see the *Application User Manual*.

3.1.11 Infrastructure

Under this tab, information about the project Infrastructures can be found and provided; its content can be modified, if necessary. This tab is identical to the one on the application, for further information see the *Application User Manual*.

3.1.12 Communication and Visibility

Under this tab, information about the Communication and Visibility elements of the project can be found and provided; its content can be modified, if necessary. This tab is identical to the one on the application, for further information see the *Application User Manual*.

3.1.13 Partner without budget

Under this tab, information about those Partner(s) of the project can be found and provided whom there is no budget planned; its content can be modified, if necessary. This tab is identical to the one on the application, for further information see the *Application User Manual*.

3.1.14 Contract

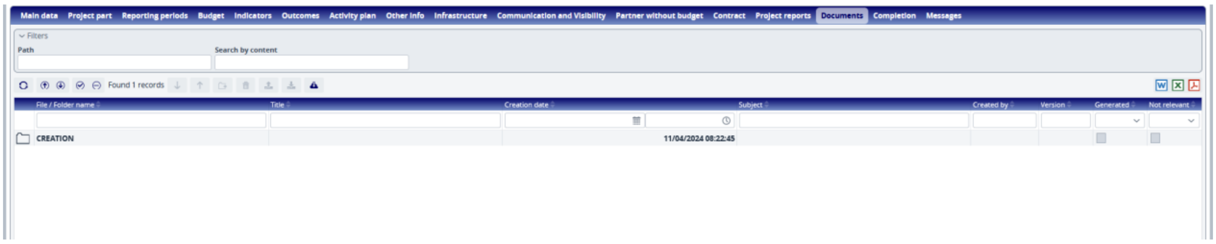
Under this tab, information about the Contract and Addendums (if any) of the project can be found. This tab is only to display information – the user cannot edit its content!

3.1.15 Project Reports

Under this tab, information about the Project reports (PR) of the project will be found. This tab is only to display information – the user cannot edit the PR contents from here!

3.1.16 Documents

Under this tab, the project Documents can be found in a pre-organized folder structure. The User can upload the missing supporting documents (if requested) under the corresponding Contracting documents folder. This tab functions similarly to the one on the Application.



16.The Documents

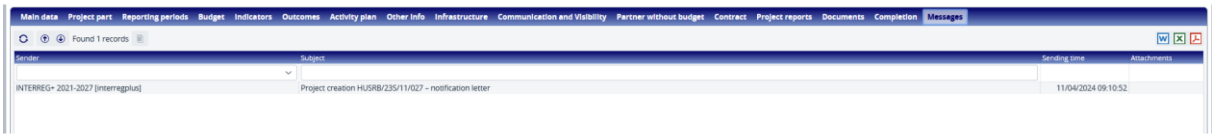
3.1.17 Completion

Under this tab, information about the completion round(s) can be found. The completion deadline, and Justification provided by the Programme Manager can be seen. The comment on completion field is mandatory to fill in by the User before the project can be submitted to the JS. Select the actual completion entry from the list, click on the Modify function button. In the pop-in window, in the upper right corner of the Comment on completion field, click on the Modify button to address each entry of the JS Justification. Then save the changes.

17.Completion – Comment on completion

3.1.18 Messages

Under this tab, the system generated project-related e-mails are listed. Its function is similar to that of the Messages icon located in the main header (*see chapter 2.1*).



18.Messages of the project

3.1.19 Sending the prepared project for signing

As the project is updated according to the requests in completion set by the JS Programme Manager, the project can be sent to the Signatory user(s) for e-signing by clicking on the 'Send for signature' button. By pressing the button, the system runs the validation routines, and if no violation of the rules is found, the process moves to the *E-sign* step. If the validation finds any violation, the corresponding error message(s) appears on the screen.

3.2 *E-SIGNING AND SUBMITTING THE PROJECT*

After the project is updated by the Recording user and sent for signing, the process moves to the Signatory user. The Signatory user cannot edit the project, if further editing is necessary, the project must be sent back to the Recording user. By pressing the Sign button the project can be submitted to the JS Programme Manager.

4. INTERREG+ TECHNICAL SUPPORT

Should you have any technical issue concerning INTERREG+ IT System functioning, please contact INTERREG+ Support Team at the iplussupport@szpi.hu e-mail address.

To support your case, please, provide a description of the problem with as much details as possible, and always attach screenshots, of which the entire screen is visible. Additionally, please provide the Project (Part) ID and the username.