



# User Manual

for

**the IMIS 2014—2020 Project Report  
(PR&AfR) Module**

for

**Lead Beneficiaries of the Interreg V-A Slovakia-Hungary  
Cooperation Programme**

## Table of Contents

1	Using this Manual.....	3
2	Technical Instructions.....	3
2.1	Technical Requirements.....	3
2.2	General Usage Rules.....	3
2.3	Using Fields.....	4
3	How to Access IMIS 2014–2020 Front Office.....	6
3.1	Logging In.....	6
3.2	The Menu.....	8
4	Project Reports (Project Report & Application for Reimbursement (PR&AfR)).....	9
4.1	The PR&AfR Front Office Interface.....	10
4.1.1	The DOVE SELECT Tab.....	10
4.1.2	Main Data Tab.....	11
4.1.3	Achievements Tab.....	12
4.1.4	Activities Tab.....	13
4.1.5	Horizontal principles screen.....	18
4.1.6	Indicators Tab.....	19
4.1.7	Information and Publicity Tab.....	21
4.1.8	Financial Data screen.....	23
4.1.9	Financial Data / Beneficiary Tab.....	24
4.1.10	Financial Data / PR&AfR Tab.....	24
4.1.11	Sources of Funding Tab.....	25
4.1.12	Transfer from LB Tab.....	26
4.1.13	Documents Tab.....	28
5	Available Project Report Operations (View, Modify, Delete, Submit, Generate Form).....	29
5.1	Viewing the Project Report (PR&AfR).....	29
5.2	Modifying Project Reports (PR&AfR).....	29
5.3	Deleting a Project Report (PR&AfR).....	30
5.4	Generating Forms out of Project Reports (PR&AfRs).....	30
5.5	Finalising, Signing and Forwarding Project Reports – as a Recording User.....	31
5.6	Digital Signing and Submission of Project Reports – As a Signatory User.....	33
5.7	Completion in case of revalidation of the relevant BR.....	37
5.8	The Submission Process.....	38



## 1 Using this Manual

The main aim of this User Manual is to provide guidance to Lead Beneficiaries of the Interreg V-A Slovakia-Hungary Cooperation Programme on the use of the IMIS 2014–2020 Monitoring and Information System. Lead beneficiaries can submit their project reports (PR&AfR) through the Front Office interface regarding their commitments made in the project module.

Project reports can be submitted electronically through the IMIS 2014–2020 Front Office PR&AfR module.

The Manual

- provides descriptions of how to fill out and submit project reports, and
- provides practical and technical information about data entry.

Before starting your work, please:

- make sure that your computer meets the technical requirements (see the *Technical Instructions* chapter).
- study all chapters of the Manual and familiarise yourself with screen layouts and the logic of the system.

While filling out your project report, please keep referring to the relevant chapters of the Manual.

## 2 Technical Instructions

This chapter informs you about the technical requirements, the general usage rules and the rules on the use of fields and buttons.

### 2.1 Technical Requirements

All client computers running IMIS 2014–2020 PR&AfR Front Office need to meet the following technical requirements:

- Operating system: a desktop operating system is recommended (e.g.: Microsoft Windows).
- Resolution: 1280\*768 or higher.
- Web browser: we recommend Mozilla Firefox 46.0.1 or newer, Google Chrome 50.0 or newer, or Internet Explorer 11.0 or newer.
- Allow cookies in your browser.
- PDF reader (e.g.: Adobe Reader).
- Word processor (e.g.: Microsoft Office) for opening DOC files.
- Internet connection.

### 2.2 General Usage Rules


- IMIS 2014–2020 is a web application; thus, any problem with the Internet connection may disrupt communication between the server and the client computer. If this happens, the screen goes grey and the following message is displayed: „Server connection lost, trying to

reconnect...". The session can be continued after the connection is restored, unless the timeout limit is reached. After a timeout, you will be required to log in again.

- If your session is inactive for 60 minutes (no data entry, no clicks etc.) the system terminates the connection between the server and the client for security purposes, and the following error message is displayed: „Session expired...". In this case, press Esc and log in again.
- Please keep in mind that only one user may work on a project report at any one time. Avoid parallel use (e.g. one person entering financial data, another person entering text at the same time). Parallel use may lead to errors and data losses.


## 2.3 Using Fields

The system uses several types of fields, which may have particular characteristics and require different usage.



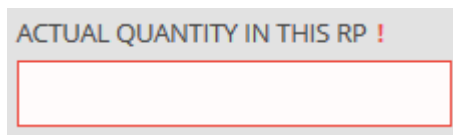
A screenshot of a form field with a grey background. The label above the field is "PROJECT DURATION". The field itself contains the number "24".

- Fields with a grey background – read-only fields, generally displaying values filled in automatically by the system, or values the applicant entered previously through another interface.



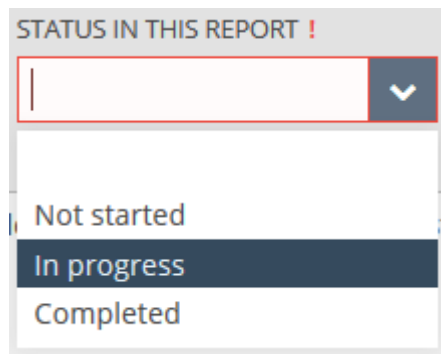
A screenshot of a form field with a white background. The label above the field is "COMMENT". The field is empty.

- Fields with a white background – normal entry fields.



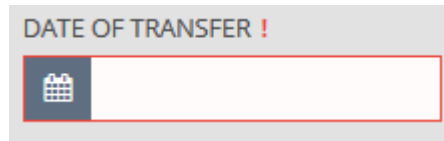
A screenshot of a form field with a white background and a red border. The label above the field is "ACTUAL QUANTITY IN THIS RP !". The field is empty.

- Fields with a white background and a red border – similar to normal entry fields, except these are mandatory fields. Fields that the user entered unexpected content into are also marked with a red border. In such cases, the validation message is displayed in a tooltip if the mouse is hovered above the field.



A screenshot of a form field with a white background and a red border. The label above the field is "STATUS IN THIS REPORT !". The field is a dropdown menu with a downward arrow on the right. The dropdown menu is open, showing three options: "Not started", "In progress", and "Completed". The "In progress" option is highlighted with a dark blue background.

- Drop-down fields – these fields can be filled in using a predetermined set of values. Click on the arrow to open the drop-down list, and click on the chosen value.

A screenshot of a web form element. At the top, the text "DATE OF TRANSFER !" is displayed in a grey box. Below this is a white input field with a red border. On the left side of the input field is a small blue square containing a white calendar icon.

- Date fields – enter dates using the accepted date format (day/month/year) or click on the calendar icon and select a day.

### 3 How to Access IMIS 2014–2020 Front Office

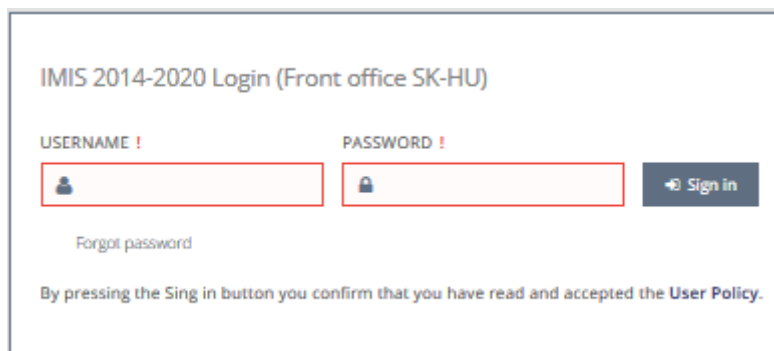
Project reports (PR&AfR) can be compiled and submitted using the Front Office module of IMIS 2014–2020 Monitoring and Information System.

- Use the link [IMIS 2014-2020 SKHU PR&AfR](#) to access all screens of Front Office in your web browser in English.
- The browser supported by the system is Mozilla Firefox.
- Working on the same project report in multiple browser windows at the same time is not supported.
- There is no automatic background save feature in the module, but each screen has a Save button.
- You can use the Save feature to suspend the submission process at any point.

The following rules apply to using the module.

#### 3.1 Logging In

- Please follow the steps laid out in the automatic e-mail to install the certificate required for accessing the system.
- Then add your certificate to your browser. You can do so in Firefox under “Options”/“Data Protection and Security”/“Certificates”. In the “View Certificates” window, on the “Your Certificates” tab, click “Import”, then “OK”. Please restart your browser after the installation.
- Then click on the [IMIS 2014-2020 link](#) – or on “Login” in the system message – to access the following screen.



IMIS 2014-2020 Login (Front office SK-HU)

USERNAME !      PASSWORD !



[Forgot password](#)

By pressing the Sing in button you confirm that you have read and accepted the [User Policy](#).


- Finally, log in through the IMIS 2014–2020 login screen using the user name sent via e-mail and the newly received temporary password. Click on “Sign in”. By logging in, you automatically accept the Terms and Conditions.
- Attention: the password has limited validity; you need to log in within two hours. If more than two hours elapsed since the receipt of the e-mail, you can request a new temporary password by clicking on the **Forgot Password** button on the login screen.


Please, provide your username.

USERNAME !

  
  
 !   
 

- After logging in, you need to change your password (enter the temporary password supplied by the system again then enter your chosen new password twice). Your password needs to be at least 8 characters long, and it needs to contain lower-case and capital letters and numbers. You can change your password later at any time by clicking on “Change Password” in the Front Office home screen.

PROFILE 

 Save

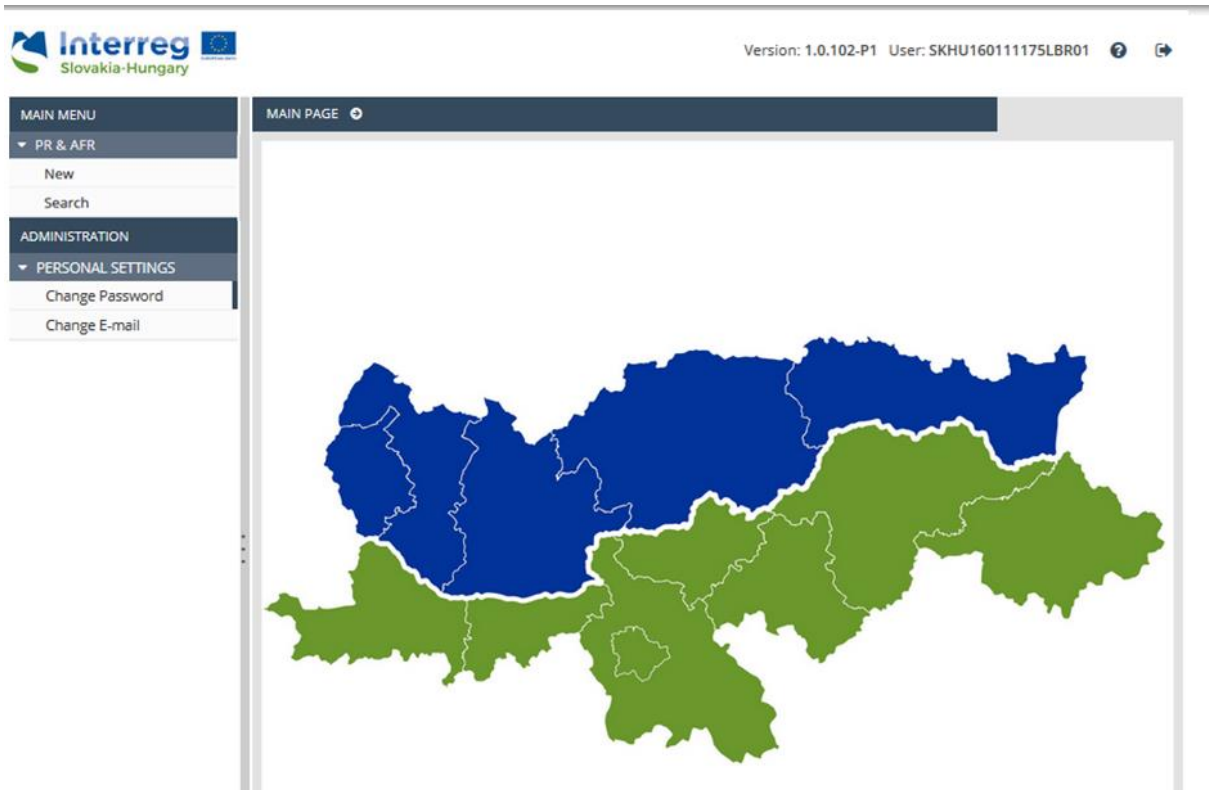
PASSWORD

OLD PASSWORD !      NEW PASSWORD !      NEW PASSWORD AGAIN !



## 3.2 The Menu



After logging in successfully, the Front Office interface is displayed:



The menus on the left hand side of the screen are grouped into two categories:

- **PR&AfR** – use this menu item to launch the creation of a new PR&AfR, view earlier reports or continue previously started PR&AfRs.
  - **New** – start assembling a new PR&AfR here. Please always use the Search menu item to check whether you already have an initiated PR&AfR.
  - **Search** – search previously created PR&AfRs.
- **Personal Settings** – use this menu item to initiate changes to your password and e-mail address.
  - **Change password** – clicking on this menu item opens the password change screen.
  - **Change e-mail** – clicking on this menu item opens the e-mail address change screen.

You can open and close the menu items by clicking on the small arrow in front of each menu item. Click on the vertical grey strip on the right hand side of the menu bar in order to hide or unhide the menu bar and increase the space available for other content.

Click on the  icon in the top right corner to access the user manual, and click on the  icon (and confirm your choice) to log out of the system.

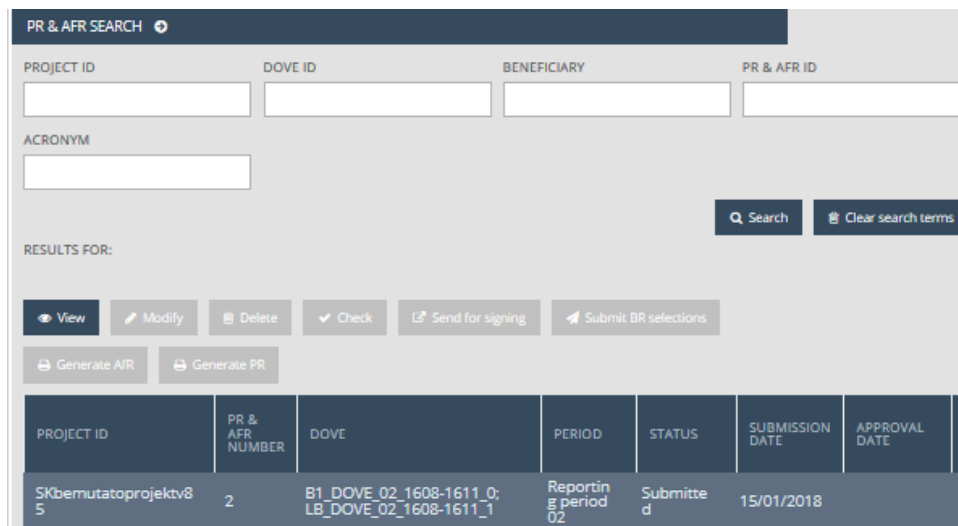
## 4 Project Reports (Project Report & Application for Reimbursement (PR&AfR))

Lead beneficiaries can submit their project-level reports (PR&AfR) through the Front Office interface regarding their commitments made in the project module.

No new reports may be submitted for approval until previously submitted reports are adjudicated.

If you wish to start a new report, log in as the project's recording user and click on PR&AfR/NEW in the left-hand menu.

If you wish to continue working on a previously started report, log in as the project's recording user and click PR&AfR/SEARCH in the left-hand menu, then select the relevant report from the hit list and click MODIFY.



The screenshot displays the 'PR & AfR SEARCH' interface. It features search filters for PROJECT ID, DOVE ID, BENEFICIARY, PR & AfR ID, and ACRONYM. Below the filters are 'Search' and 'Clear search terms' buttons. A 'RESULTS FOR:' section contains action buttons: View, Modify, Delete, Check, Send for signing, Submit BR selections, Generate AIR, and Generate PR. A table below shows search results with columns: PROJECT ID, PR & AfR NUMBER, DOVE, PERIOD, STATUS, SUBMISSION DATE, and APPROVAL DATE.

PROJECT ID	PR & AfR NUMBER	DOVE	PERIOD	STATUS	SUBMISSION DATE	APPROVAL DATE
SKbematatoprojektv85	2	B1_DOVE_02_1608-1611_0; LB_DOVE_02_1608-1611_1	Reporting period 02	Submitted	15/01/2018	

The project report may only contain validated beneficiary reports; thus, when a beneficiary's report is approved, a Declaration on Validation of Expenditure (DOVE) is created, and if the beneficiary's report contains no expenditures, a Declaration on Validation of Expenditure (DOVE) with zero amount is created.

The Lead Beneficiary is responsible for selecting the DOVEs, and the chosen DOVEs contain aggregate data. The Lead Beneficiary is also responsible for drawing up and finalising technical supporting documents, determining project-level technical progress and determining which of the documents submitted by the beneficiaries are relevant.

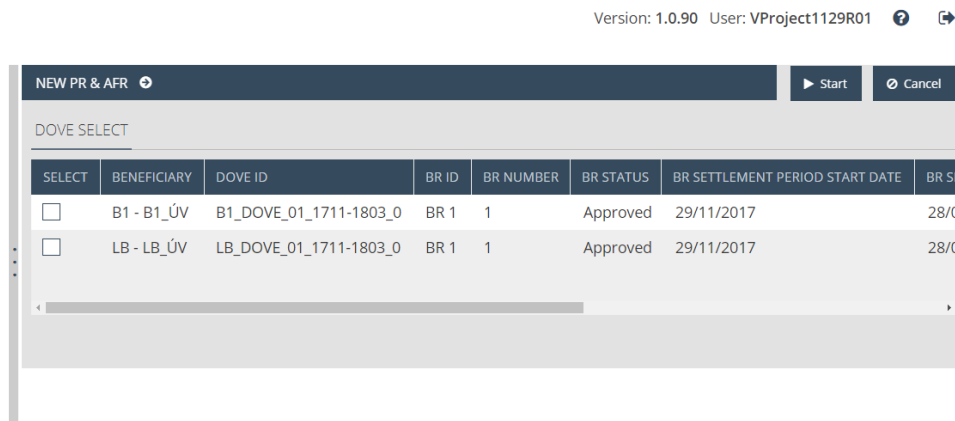
The **PR&AfR** is made up of two parts:

- **PR** – Project Report – the technical report part
- **AfR** – Application for Reimbursement – the financial part.

## 4.1 The PR&AfR Front Office Interface

### 4.1.1 The DOVE SELECT Tab

As the first step of compiling the report, the system lists the currently unselected DOVEs and TDOVEs; the Lead Beneficiary has to select the DOVEs they wish to base the PR&AfR on.



When compiling a project-level report, please use the checkbox in the first column to select the beneficiary reports.

The following buttons are shown:

- **Start** – initiate the recording process.
- **Cancel** – quit data viewing.

#### 4.1.2 Main Data Tab

This tab displays the primary information available on the project report.

Version: 1.0.90 User: VProject1129R01

PR & AFR DATASHEET

INFORMATION REMINDER

MAIN DATA ACHIEVEMENTS ACTIVITIES HORIZONTAL PRINCIPLES INDICATORS INFORMATION AND PU

PROJECT ID ÚV\_Project\_11\_29 PROJECT ACRONYM ÚV\_Project\_11\_29 PROJECT TITLE ÚV\_Project\_11\_29

PROJECT START DATE 29/11/2017 PROJECT END DATE 29/11/2018 PROJECT DURATION 12

PR & AFR ID PR & AFR NUMBER

RELEVANT DOVE(S) LB\_DOVE\_01\_1711-1803\_0

PR & AFR SETTLEMENT PERIOD START DATE 29/11/2017 PR & AFR SETTLEMENT PERIOD END DATE 28/03/2018

FINAL REPORT

REPORTING PERIOD ID	DOVE	START DATE	END DATE
Reporting period 01	LB_DOVE_01_1711-1803_0	29/11/2017	28/03/2018

LB CONTACT PERSON

NAME teszt 1 teszt POSITION teszt E-MAIL ADDRESS teszt@teszt.hu

OFFICE PHONE +36 MOBILE PHONE 22222222

The following fields are shown:

- **Project ID** – the project’s unique identifier; filled out automatically
- **Project acronym** – the project’s abbreviated name; filled out automatically
- **Project title** – the project’s name; filled out automatically
- **Project start date** – the project’s starting date; filled out automatically
- **Project end date** – the project’s ending date; filled out automatically
- **Project duration** – the length of the project in months; filled out automatically
- **PR&Afr ID** – the unique identifier of the PR&Afr; filled out automatically after submission
- **PR&Afr number** – the serial number of the PR&Afr; filled out automatically after submission
- **Relevant DOVE(s)** – the identifiers of the declarations of validation selected for the PR&Afr; filled out automatically
- **PR&Afr settlement period start date** – the starting date of the PR&Afr; filled out automatically
- **PR&Afr settlement period end date** – the ending date of the PR&Afr; filled out automatically

- **Final report** – if the PR&AfR is the final report, please use the checkbox to mark it as such

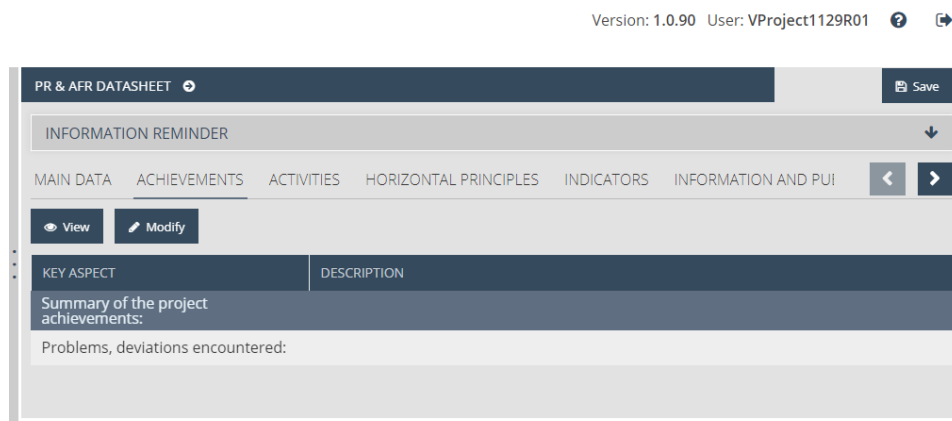
Lower down, a table is shown listing the selected beneficiary reports.

At the bottom, the contact information of the project’s Lead Beneficiary is shown:

- **Name** – the contact person’s name; filled out automatically
- **Position** – the contact person’s position; filled out automatically
- **E-mail address** – the contact person’s e-mail address; filled out automatically
- **Office phone** – the contact person’s official telephone number; filled out automatically
- **Mobile phone** – the contact person’s mobile phone number; filled out automatically

#### 4.1.3 Achievements Tab

This tab allows you to answer general questions regarding the project’s technical progress in the period in question.



To provide information on a given issue, select it, then click on **Modify**. In order to view a previously entered response, click on **View**.

##### 4.1.3.1 Modifying the PR&AfR Description

Select the line in question, then open it for modification. This opens the following window, in which you can answer the general question on the period in question.

The following fields are shown:

- **Key aspect** – summary question
- **Guide** – useful user guide for answering the question.
- **Description** – please answer the question here

Click on **Save** to save the data entered, or click on **Cancel** to abort data entry and return to the previous tab.

#### 4.1.4 Activities Tab

This tab lists all the activities committed to being achieved. The lead beneficiary can report on the project-level progress on the tab.

Version: 1.0.90 User: VProject1129R01 ? ↗

NO	ACTIVITY NAME	APPROVED STATUS
2	Communication	
1	Project management	

To provide information on a given activity, select it, then click on **Modify**. In order to view the progress of an outcome, click on **View**.

#### 4.1.4.1 Main Data Tab

The datasheet shows the key information on the activity.

### ACTIVITY DATASHEET

Save Cancel

---

MAIN DATA   DOCUMENTS   HISTORY

---

ACTIVITY NAME

Project management

ACTIVITY STATUS      ACTIVITY ORIGINALLY PLANNED

In progress     

ORIGINAL DESCRIPTION

The project management team consists of the internal project co-ordinators of each partner accompanied by the external project manager hired by the LB. The internal project co-ordinators are responsible for overall project implementation: participation in project meetings (2/year), reporting, financial management etc. The internal project co-ordinators of PKE and MVÖ will be reimbursed by flat rate financing, as in case of these partners exclusively management staff is planned. The project co-or

CURRENT DESCRIPTION (BY BENEFICIARY REPORTS)

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CURRENT DESCRIPTION !

BENEFICIARY	DESCRIPTION	ACTIVITY STATUS
LB - FHNPI	aaa	In progress

< < Page:  / 1 > > ↺ ↻ Total: 1

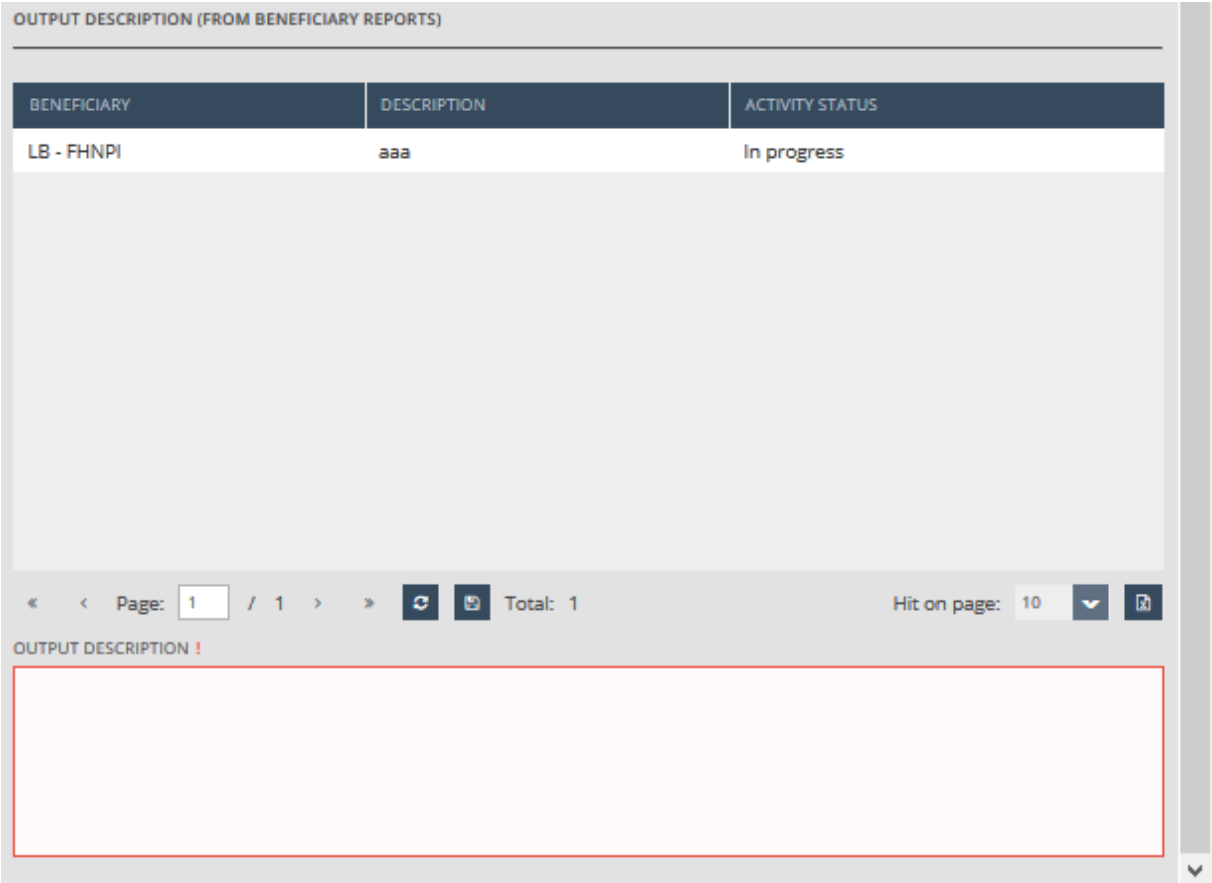
Hit on page:  > 📄

Field list:

- **Activity name** – name of the activity; filled out automatically
- **Activity status** – Please select a status from the drop-down list relevant for the activity for that period.
- **Activity originally planned** – In case the activity was planned for the relevant period, the check-box is ticked in.
- **Original description** – Description of the commitment on the activity in the project.
- **Current description (By beneficiary reports)** – Please enter the progress of the activity in the relevant period.

The relevant descriptions and their statuses, entered by the beneficiaries of the project in the beneficiary reports, are shown in the middle table on the screen.

The progress on the relevant outcome can be entered on the lower section of the screen.



The relevant descriptions and their statuses, entered by the beneficiaries of the project for the relevant outputs, are shown in the lower table of the screen.

- **Output description** – Please enter the output description for the activity.

Click on **Save** to save the data entered, or click on **Cancel** to abort data entry and return to the previous tab.



#### 4.1.4.2 Documents

This tab allows you to submit and view the documents proving the progress of the outcome.

The screenshot shows a window titled "ACTIVITY DATASHEET" with a close button in the top right corner. Below the title bar are "Save" and "Cancel" buttons. The main area has three tabs: "MAIN DATA", "DOCUMENTS" (selected), and "HISTORY". There are four input fields: "FILE NAME (ID)", "TYPE" (with a dropdown arrow), "ORIGINAL FILE NAME", and "SEQUENCE NUMBER". Below these are "Search" and "Clear search terms" buttons. A "RESULTS FOR:" label is present. At the bottom, there are "Download", "Upload", "Delete", and "Reorder" buttons. A table header is visible with columns: "FILE NAME (ID)", "TYPE", "ORIGINAL FILE NAME", "SEQUENCE NUMBER", and "DATE AND TIME OF CREATION".

In case of modification, at the top is a search area that you can use to filter the hit list using the following fields:

- **File name (id)** – the file’s unique identifier
- **Type** – the file’s extension format
- **Original file name** – the file name
- **Sequence number** – the file’s serial number

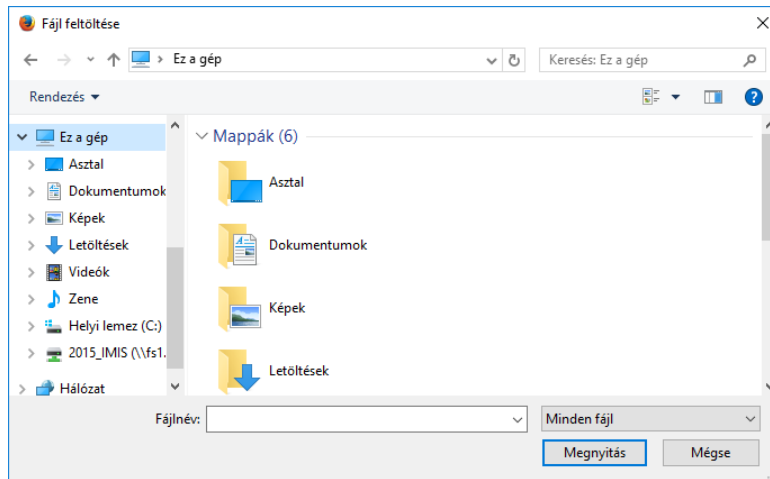
The bottom part of the window offers the following file management options:

- **Download** – download the file
- **Upload** – upload a new file
- **Delete** – delete an existing file
- **Reorder** – change the order of existing files

Click on the **Upload** button, which opens the file uploading window. Choose the file to be uploaded, then click on Open.

**Note that the maximum file size is 30 MB.** There is no limitation on the combined total size of files.

It is important to note that compressed (.zip) files can also be uploaded here.



The selected and uploaded file is shown in the hit list within the document in question.

#### 4.1.4.3 Viewing the History

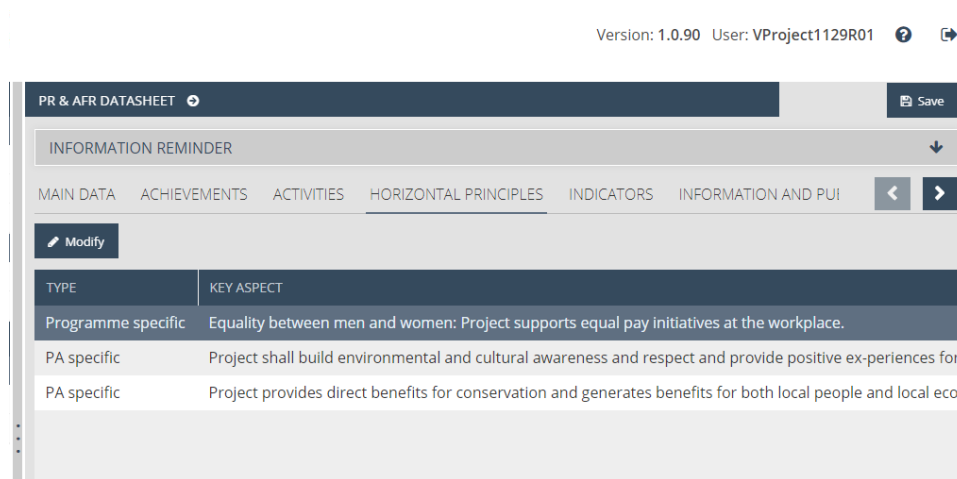
This tab contains a table showing the previous reports and the progress made with regard to the outcomes.

PROJECT ID	PROJECT REPORT NUMBER	PERIOD	STATUS	SUBMISSION DATE	APPROVAL DATE	TOTAL REPORTED AMOUNT (EUR)

Page: 1 / 1 Total: 0 Hit on page: 10

#### 4.1.5 Horizontal principles screen

The horizontal principles committed to in the project are listed on the screen. The lead beneficiary can enter the project level progress on the screen. You can enter information to a relevant horizontal principle by selecting it and clicking Modify.



You can enter information to the relevant horizontal principle by selecting it and clicking Modify.

##### 4.1.5.1 Main data screen

You can view the principle's datasheet with the following fields:

- **Type** – type of the horizontal principle, automatically filled.
- **Horizontal principle status** – please select the current status of the horizontal principle from the drop-down list.
- **Key aspect** – the name of the horizontal principle, automatically filled.
- **Original description** – the description of the horizontal principle committed in the project, automatically filled.
- **Current description (by LB)** – please enter the description of the horizontal principle for the relevant period.

**HORIZONTAL PRINCIPLE DATASHEET**

Save Cancel

MAIN DATA DOCUMENTS HISTORY

TYPE Programme specific HOR. PRINC. STATUS !

KEY ASPECT Equality between men and women: Project supports equal pay initiatives at the workplace.

ORIGINAL DESCRIPTION teszt

CURRENT DESCRIPTION (BY LB)

After correctly entering the data in the fields on the datasheet, click on **Save** to save the data entered, or click on **Cancel** to abort data entry and return to the previous tab

#### 4.1.5.2 Documents

You can upload and view the documents proving the progression of the horizontal principles on the screen. The screen works similar to the Documents tab described earlier.

#### 4.1.5.3 View History

The screen works similar to the History tab described earlier.

#### 4.1.6 Indicators Tab

This tab contains a table showing the indicators undertaken in the project.

Version: 1.0.90 User: VProject1129R01 ? ↗

**PR & AFR DATASHEET** Save

INFORMATION REMINDER

MAIN DATA ACHIEVEMENTS ACTIVITIES HORIZONTAL PRINCIPLES INDICATORS INFORMATION AND PUI

View Modify

INDICATOR NAME
CO09   Sustainable tourism: Increase in expected number of visits to supported sites of cultural and natural heritage and attractions
CO01   Productive investment: Number of enterprises receiving support (PA1)
PS07   Number of sustained working places
R110   Total number of visitors in the region

You can enter information to the relevant indicator by selecting it and clicking on **Modify**. In order to view the progress of the relevant indicator, click on **View**.

#### 4.1.6.1 Main Data

The Lead Beneficiary can enter indicator description here.

INDICATORS DATASHEET

Save Cancel

MAIN DATA DOCUMENTS HISTORY

INDICATOR NAME  
CO09 | Sustainable tourism: Increase in expected number of visits to supported sites of cultural and natural heritage and attractio

INDICATOR CATEGORY: Common    INDICATOR TYPE: Output    UNIT: visits/year

BENEFICIARY REPORT NUMBER	RELEVANT BENEFICIARY	BASE VALUE	TARGET VALUE	ACTUAL VALUE	ACHIEVED VALUE	REMAINING VALUE
1	LB - LB_ÚV	0	10	5	0	5
TOTAL		0	10	5	0	5

INDICATOR ORIGINAL DESCRIPTION

INDICATOR CURRENT DESCRIPTION  
LB\_ÚV: teszt

INDICATOR CURRENT DESCRIPTION (BY LB)  
LB\_ÚV: teszt

Field list:

- **Indicator name** – the name of the indicator; filled out automatically
- **Indicator category** – the indicator’s category; filled out automatically
- **Indicator type** – type of the indicator; filled out automatically
- **Unit** – measuring unit of the indicator; filled out automatically

You can view the data reported by the beneficiaries of the project in the beneficiary reports in the table under the general information, where you can view the progress made so far:

- **Beneficiary report number** – the relevant beneficiary report’s number; filled out automatically
- **Relevant beneficiary** – name of the relevant beneficiary; filled out automatically
- **Base value** – the indicator’s starting value; filled out automatically
- **Target value** – the indicator’s value that needs to be achieved; filled out automatically

- **Actual value** – The indicator’s value reported by the beneficiary in the relevant BR. In case no number is present in the table, the indicator is not relevant to the beneficiary.
- **Achieved value** – filled out automatically based on the values reported in the previous BRs.
- **Remaining value** – the remaining part is filled out automatically based on the target value and the accumulated value

You can find the values aggregated on the project level in the last row of the table

- **Indicator original description** – the commitment of the indicator in the project; filled out automatically
- **Indicator current description** – the description of progress made in the relevant period, reported in the BRs by the beneficiaries; filled out automatically
- **Indicator current description (by LB)** – please enter a description of the result achieved in the period in question with regard to the indicator

Click on **Save** to save the data entered, or click on **Cancel** to abort data entry and return to the previous tab.

#### 4.1.6.2 Documents

Here, you can submit and view the documents proving progress with regard to the indicator. The interface works the same way as the above described Documents interfaces.

#### 4.1.6.3 Viewing the History

The interface works the same way as the above described History interfaces.

#### 4.1.7 Information and Publicity Tab

This tab contains a table showing the information and publicity activities undertaken in the project.

Version: 1.0.90 User: VProject1129R01 ? ↗

NO	INFORMATION & PUBLICITY TYPE	COMMUNICATION TOOL	LANGUAGE USED
1	2. Web appearance	Project website	HU

To provide information on a given activity, select it, then click on **Modify**. In order to view the data on an activity, click on **View**.

##### 4.1.7.1 Main Data

Information on the progress of the selected information and publicity activity is shown here, including the descriptions provided by the beneficiaries previously in the beneficiary reports.

INFORMATION & PUBLICITY DATASHEET

Save Cancel

MAIN DATA DOCUMENTS HISTORY

INFORMATION AND PUBLICITY TYPE: 2. Web appearance

STATUS IN THIS REPORT !

ORIGINALLY PLANNED:

ORIGINAL DESCRIPTION: teszt info

CURRENT DESCRIPTION (FROM BENEFICIARY REPORT): LB - LB\_ÜV: teszt  
B1 - B1\_ÜV: teszt

DESCRIPTION (IN THIS REPORT) !

USED LANGUAGE: HU

COMMUNICATION TOOL: Project website

MEASUREMENT UNIT: db, 10

PLANNED QUANTITY: 100

ACTUAL QUANTITY:

TOTAL ACHIEVED QUANTITY:

PLANNED NO. OF REACHED P.: 100

ACTUAL NO. OF REACHED P.: 5

TOTAL ACH. NO. OF REACHED P.:

Field list:

- **Information & publicity type** – type of the information and publicity activity; filled out automatically
- **Status in this report** – select the status of the information and publicity activity appropriate for the period in question
- **Originally planned** – this checkbox is selected automatically if the communication activity was originally planned for a given period
- **Original description** – the original description of the communication activity; filled out automatically
- **Current description (from Beneficiary report)** – the description of the communication activity provided by the beneficiaries; filled out automatically based on the data in the selected beneficiary reports
- **Description (in this report)** – please enter a description of the information and publicity activity carried out in the period in question
- **Used language** – the language used in the course of the activity; filled out automatically
- **Communication tool** – the planned name / tool of the communication activity; filled out automatically
- **Measurement unit** – the unit of measurement of the information and publicity activity; filled out automatically
- **Planned quantity** – the planned quantity of the communication activity; filled out automatically

- **Actual quantity** – the actual quantity of the communication activity; filled out automatically
- **Total achieved quantity** – the sum of the quantities of communication activities approved and under approval; filled out automatically
- **Planned number of reached people** – number of people planned to be reached by the communication activity; filled out automatically
- **Actual number of reached people** – the number of people reached by the communication activity; filled out automatically
- **Total achieved number of reached people** – the sum of reached people already approved and under approval; filled out automatically

Click on **Save** to save the data entered, or click on **Cancel** to abort data entry and return to the previous tab.

#### 4.1.7.2 Documents

This interface works as described in previous Documents chapters above.

#### 4.1.7.3 Viewing the History

The interface works the same way as the above described History interfaces.

#### 4.1.8 Financial Data screen

This is a read-only screen, showing the DOVEs selected for the PR&AfR in the top table. In the bottom table, the DOVEs selected in the current PR&AfR are listed by budget heading and budget lines, and their financial data are in a summary table on the bottom.

Version: 1.0.90 User: VProject1129R01 ? ↗

PR & AFR DATASHEET
Save

INFORMATION REMINDER

INFORMATION AND PUBLICITY
FINANCIAL DATA
FINANCIAL DATA / BENEFICIARY
FINANCIAL DATA / PR&AFR
◀ ▶

View

BENEFICIARY	DOVE NO	DOVE ID	BR SETTLEMENT PERIOD START DATE	BR SETTLEMENT PERIOD END DATE
LB - LB_ÚV	1	LB_DOVE_01_1711-1803_0	29/11/2017	28/03/2018

BUDGET LINE	LB_DOVE_01_1711-1803_0	TOTAL
1. Preparation costs	0,00	0,00
1.1 Preparation cost	0,00	0,00
1.1.01 Feasibility study	0,00	0,00
1.1.02 Building documentation	0,00	0,00
1.1.03 Permits	0,00	0,00



By selecting a beneficiary's report in the top table and clicking on **View**, you can open a pop-up window that displays the invoices covered by the beneficiary's report in question budget line by budget line. The bottom of the window also shows the registered invoices. You can run searches on the invoices by setting filter parameters. By selecting an invoice and clicking on **View**, you can access the screen of the invoice in question, and all the documents that have been uploaded in connection with that invoice (Documents tab).

#### 4.1.9 Financial Data / Beneficiary Tab

This is a read-only tab. Pick a beneficiary to view its financial data associated with the PR&AfR in question in a table by budget line and by item.

Version: 1.0.90 User: VProject1129R01

PR & AfR DATASHEET			
INFORMATION REMINDER			
INFORMATION AND PUBLICITY		FINANCIAL DATA	FINANCIAL DATA / BENEFICIARY
BENEFICIARY			
LB - LB_ÜV		View	
BUDGET LINE NAME	PLANNED AMOUNT	PREVIOUSLY VERIFIED	CURRENT REPORTED AMOUNT
1. Preparation costs	0,00	0,00	0,0
1.1 Preparation cost	0,00	0,00	0,0
1.1.01 Feasibility study	0,00	0,00	0,0
1.1.02 Building documentation	0,00	0,00	0,0
1.1.03 Permits	0,00	0,00	0,0
1.1.04 Translations	0,00	0,00	0,0
2. Staff costs	0,00	0,00	0,0
2.1 Project management (SK)	30 000,00	0,00	0,0

#### 4.1.10 Financial Data / PR&AfR Tab

This is a read-only tab. The top two tables show beneficiary-level financial data. The bottom two tables show the financial data of the PR&AfR budget line by budget line.



PR & AFR DATASHEET Save

INFORMATION REMINDER

FINANCIAL DATA / BENEFICIARY    FINANCIAL DATA / PR&AFR    SOURCES OF FUNDING    TRANSFER FROM LB    D

PROJECT SUMMARY

	CONTRIBUTION RATE %	PLANNED AMOUNT	PREVIOUSLY APPROVED	CURRENTLY REPORTED	ACC
EU CONTRIBUTION	85,0000000000	3 434 170,00	0,00	0,00	
NATIONAL CONTRIBUTION	15,0000000000	606 030,00	0,00	0,00	
OWN PRIVATE CONTRIBUTION	0,0000000000	0,00	0,00	0,00	
OWN PUBLIC CONTRIBUTION	0,0000000000	0,00	0,00	0,00	
<b>TOTAL CONTRIBUTION</b>		<b>4 040 200,00</b>	<b>0,00</b>	<b>0,00</b>	

LB - LB\_ÚV

	CONTRIBUTION RATE %	PLANNED AMOUNT	PREVIOUSLY APPROVED	CURRENTLY REPORTED	ACC
EU CONTRIBUTION	85,0000000000	3 400 170,00	0,00	0,00	
NATIONAL CONTRIBUTION	15,0000000000	600 030,00	0,00	0,00	
OWN PRIVATE CONTRIBUTION	0,0000000000	0,00	0,00	0,00	
OWN PUBLIC CONTRIBUTION	0,0000000000	0,00	0,00	0,00	
<b>TOTAL CONTRIBUTION</b>		<b>4 000 200,00</b>	<b>0,00</b>	<b>0,00</b>	

B1 - B1\_ÚV

	CONTRIBUTION RATE %	PLANNED AMOUNT	PREVIOUSLY APPROVED	CURRENTLY REPORTED	ACC
EU CONTRIBUTION	85,0000000000	34 000,00	0,00	0,00	
NATIONAL CONTRIBUTION	15,0000000000	6 000,00	0,00	0,00	
OWN PRIVATE CONTRIBUTION	0,0000000000	0,00	0,00	0,00	

#### 4.1.12 Transfer from LB Tab

Here, you can enter and track the transfers of the Lead Beneficiary to the beneficiaries in the course of the project, namely the forwarding of the relevant parts of the approved and paid previous PR&AFRs.

In order to record transfers, please click on **New**. In order to modify the data entered during the creation of the current PR&AFR, select the desired item and click on **Modify**. In order to view the data of a specific transfer, click on **View**. In case you entered a transfer for the report incorrectly, you can delete the item by clicking **Delete**.

#### 4.1.12.1 Entering Data on a New Transfer by the LB / Main Data

Here, you can view the primary data on transfer of the selected BR.

Field list:

- **PR&AfR** – please select the unique identifier of the relevant PR&AfR from the drop-down list.
- **Beneficiary** – please select the beneficiary who received the transfer
- **Date of transfer** – please enter the date of the transfer
- **Transferred amount** – please enter the amount of money that was transferred

Click on **Save** to save the data entered, or click on **Cancel** to abort data entry and return to the previous tab.

#### 4.1.12.2 Documents

The LB is required to upload the bank account statement/s proving the transfer/s.

This interface works as described in previous “Documents” chapters above.

### 4.1.13 Documents Tab

This interface works as described in previous “Documents” chapters above.

Version: 1.0.90 User: VProject1129R01 ? ↗

PR & AFR DATASHEETSave

INFORMATION REMINDER

FINANCIAL DATA / PR&AFRSOURCES OF FUNDINGTRANSFER FROM LBDOCUMENTS◀ ▶

RESULTS FOR:

ORDER	DOCUMENT ID	TYPE	SUBJECT	PREPARED BY (USER NAME)	SENT BY (PARTNER ID)	SEN
1	2017/000-003-5313	Attachment	Activity	VProject1129R01		
1	2017/000-003-5315	Attachment	Horizontal principles (SK)	VProject1129R01		
1	2017/000-003-5317	Attachment	Indicator	VProject1129R01		
1	2017/000-003-5319	Attachment	Information and publicity	VProject1129R01		
1	2017/000-003-5321	Attachment	Work and permit	VProject1129R01		
1	2017/000-003-5323	Attachment	Transfer from the LB	VProject1129R01		

## 5 Available Project Report Operations (View, Modify, Delete, Submit, Generate Form)

### 5.1 Viewing the Project Report (PR&AfR)

The screenshot displays the 'PR & AFR SEARCH' interface. It features a search form with fields for PROJECT ID, DOVE ID, BENEFICIARY, PR & AFR ID, and ACRONYM. Below the form are 'Search' and 'Clear search terms' buttons. A 'RESULTS FOR:' section contains several action buttons: View, Modify, Delete, Check, Send for signing, and Submit BR selections. Below these are 'Generate AFR' and 'Generate PR' buttons. At the bottom, a table lists search results.

PROJECT ID	PR & AFR NUMBER	DOVE	PERIOD	STATUS	SUBMISSION DATE	APPROVAL DATE	TOTAL REPORTED AMOUNT (EUR)	REPORT AMOUNT (EUR)
Teszt UV_HU_SRB		B1_DOVE_01_1711-1803_0; LB_DOVE_01_1711-1803_0	Reporting period 01	Under preparation			324,96	276

After entering the data, use the Save button to save the report. Then the PR&AfR is included in the hit list under PR&AfR – Search.

After saving your project report (PR&AfR), click on the Search menu item of the PR&AfR module to access the project report (PR&AfR) search feature. The hit list includes your previously created project reports (PR&AfRs). Click on the row of the desired project report (PR&AfR), then on the **View** button above the hit list.

This opens the same interface that is used for creating project reports (PR&AfRs), except all the data is shown in read-only mode; the project report (PR&AfR) cannot be modified. You can exit the view mode by clicking on a menu item or the header.

### 5.2 Modifying Project Reports (PR&AfR)

After saving your project report (PR&AfR), click on the Search menu item of the PR&AfR module to access the project report (PR&AfR) search feature. The hit list includes your previously created project reports (PR&AfR). Click on the row of the desired project report (PR&AfR), then on the **Modify** button above the hit list.

This opens the interface described in the section on creating project reports (PR&AfRs), in which you can edit the data. You can save your modifications by clicking on SAVE, or you can interrupt the process without saving by clicking on a menu item or the header.

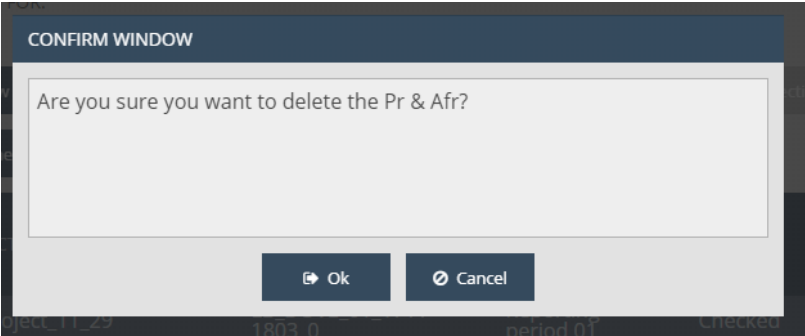
If the Secretariat carrying out the control of the submitted project report finds faults or issues that need clearing up, it will send the report back for correction. You will receive e-mail notification of this. In such cases, the application's status changes to *Need amendment*; when the issues are resolved, you will need to re-submit the report (as described in chapter 5).

It is important to note that you can only make modifications if the status of your project-level report is *Under preparation* or *Need amendment*. In other cases, the Modify button is inactive, and the submitted project report cannot be modified.

### 5.3 Deleting a Project Report (PR&Afr)

After saving your project report (PR&Afr), click on the Search menu item of the PR&Afr module to access the project report (PR&Afr) search feature. The hit list includes your previously created project reports (PR&Afrs). Click on the row of the project report (PR&Afr) you wish to delete, then click on the **Delete** button above the hit list.

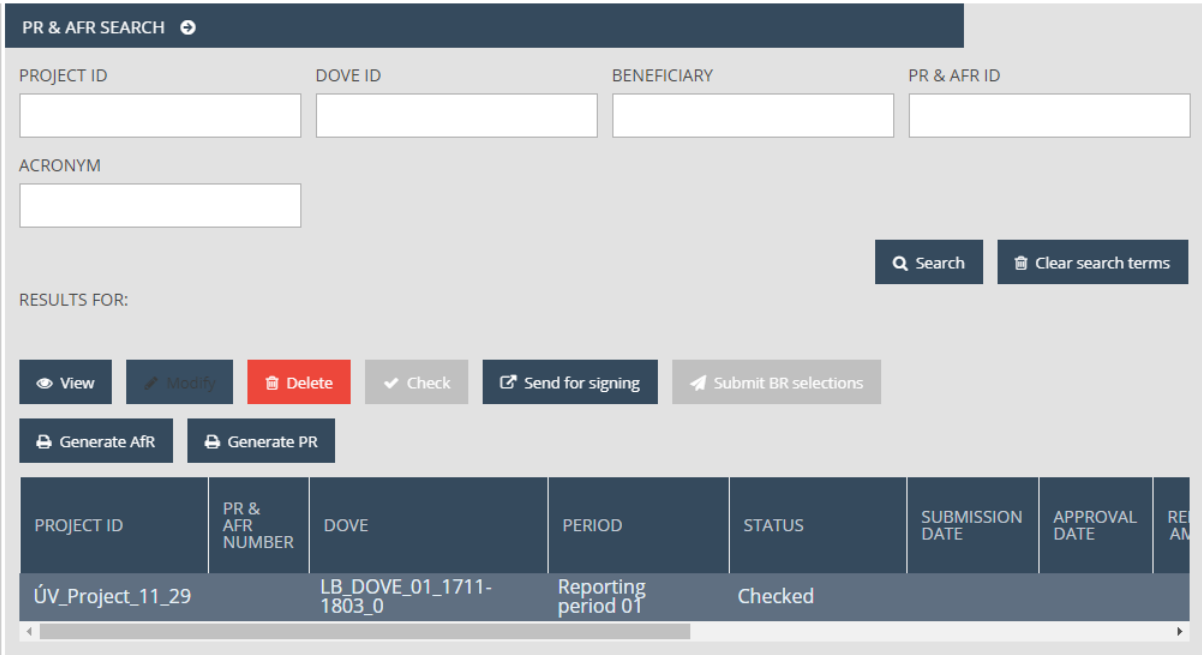
A confirmation prompt will open, in which the system asks you to confirm the deletion of the project report (PR&Afr). You can abort the deletion by clicking on Cancel. If you click on OK, the project report (PR&Afr) is deleted and its status is changed to Dropped in the search hit list.



It is important to note that you can only delete a project-level project report if its status is *Under preparation*. In other cases, the Delete button is inactive; submitted project-level reports cannot be deleted.

The deletion of project reports (PR&Afrs) cannot be undone, so please make sure you really want to delete the project report (PR&Afr) in question before clicking the OK button.

### 5.4 Generating Forms out of Project Reports (PR&Afrs)



After saving your project report (PR&AfR), click on the Search menu item of the PR&AfR module to access the project report (PR&AfR) search feature. The hit list will show your previously created project reports (PR&AfRs). Click on the row of the project report (PR&AfR) that you would like to generate a form out of, then click on the **Generate PR** and **Generate AfR** buttons above the hit list.

This opens a download window, in which you can open or save the form (in PDF format). As the data is only finalised upon submission, *DRAFT* is written in the header and footer of the generated form.

DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT

Building Partnership



## PROJECT REPORT

DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT DRAFT

Building Partnership



### Application for Reimbursement

This feature is available at all times during project report (PR&AfR) creation; it is not required that all tabs be filled out.

#### 5.5 Finalising, Signing and Forwarding Project Reports – as a Recording User

After filling out and saving your project report (PR&AfR), click on the Search menu item in the PR&AfR module to access the project report (PR&AfR) search feature. The hit list will show your previously created project reports (PR&AfRs). Click on the row of the project report (PR&AfR) that you would like to submit, then click the **Check** button above the hit list.



PR & AFR SEARCH

PROJECT ID DOVE ID BENEFICIARY PR & AFR ID

ACRONYM

Search Clear search terms

RESULTS FOR:

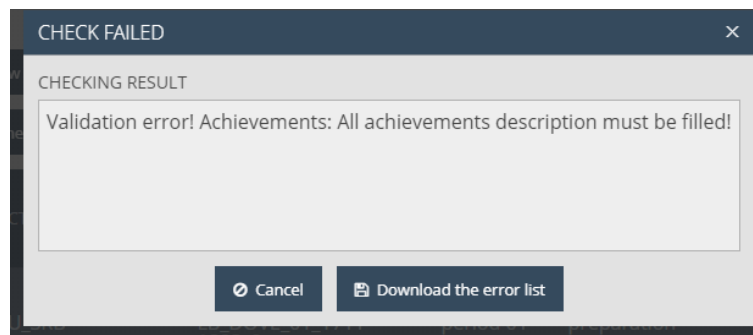
View Modify Delete Check Send for signing Submit BR selections

Generate AFR Generate PR

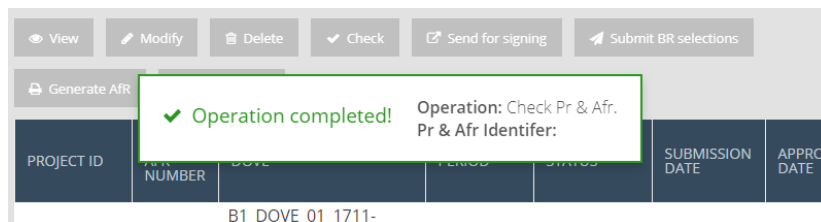
PROJECT ID	PR & AFR NUMBER	DOVE	PERIOD	STATUS	SUBMISSION DATE	APPROVAL DATE	RE AM
ÚV_Project_11_29		LB_DOVE_01_1711-1803_0	Reporting period 01	Under preparation			

An automated check is run by the system, with the following possible outcomes:

- Check failed** – if the automatic check finds errors in the project report (PR&Afr), it provides clear notification to the Lead Beneficiary about the errors in a pop-up window. The error list can be opened or downloaded in DOC format by clicking the **Download the error list** button. The pop-up window can be closed by clicking the **Cancel** button, after which the project report (PR&Afr) can be modified. The listed errors must be corrected before the project report can be submitted successfully.



- Check successful** – if the automatic check finds no errors in the project report (PR&Afr) to be submitted, the system notifies the Lead Beneficiary of the successful check in a pop-up window, and the project report (PR&Afr) is cleared for submission.



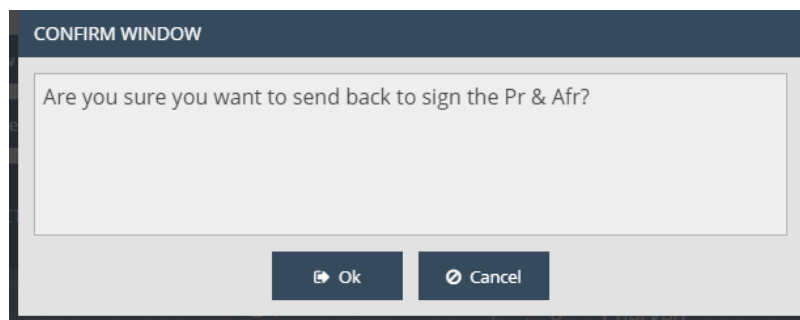
The **Check** feature can be used at any time; you can also run checks while working on your project report (PR&Afr).

Please note that if you open the report again using the Modify button after a successful check (confirmed by the “Check successful” message), the result of the previous check is deleted and you will need to run another check on the modified report before sending it to the signatory user.

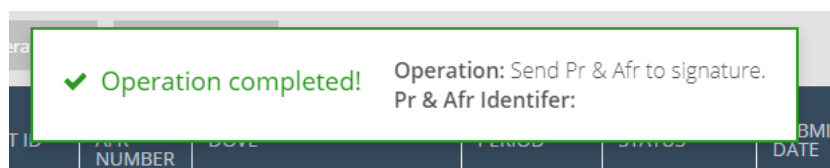
In order to submit the project report, click on the Search menu item of the PR&AfR module, select the desired project report, then click on **Send for signing**. (A successful automatic check is a prerequisite for submission; if the **Send for signing** button is inactive, run the check first by clicking on the **Check** button.)

PROJECT ID	PR & AFR NUMBER	DOVE	PERIOD	STATUS	SUBMISSION DATE	APPROVAL DATE	TOTAL REPORTED AMOUNT (EUR)	REPORT AMOUNT (EUR)
Teszt UV_HU_		B1_DOVE_01_1711-1803_0; LB_DOVE_01_1711-1803_0	Reporting period 01	Checked			324,96	276,00

After clicking on the **Send for signing** button, a pop-up window opens, in which the systems requests confirmation of the Lead Beneficiary’s intention to send the project report to be signed. If you click on the **OK** button, the project report is submitted. If you click **Cancel**, you exit this interface and you can keep modifying your project report.



The system reports the success of the forwarding operation in a pop-up message, and the status of the project report is changed to **Under signature** in the project report search.

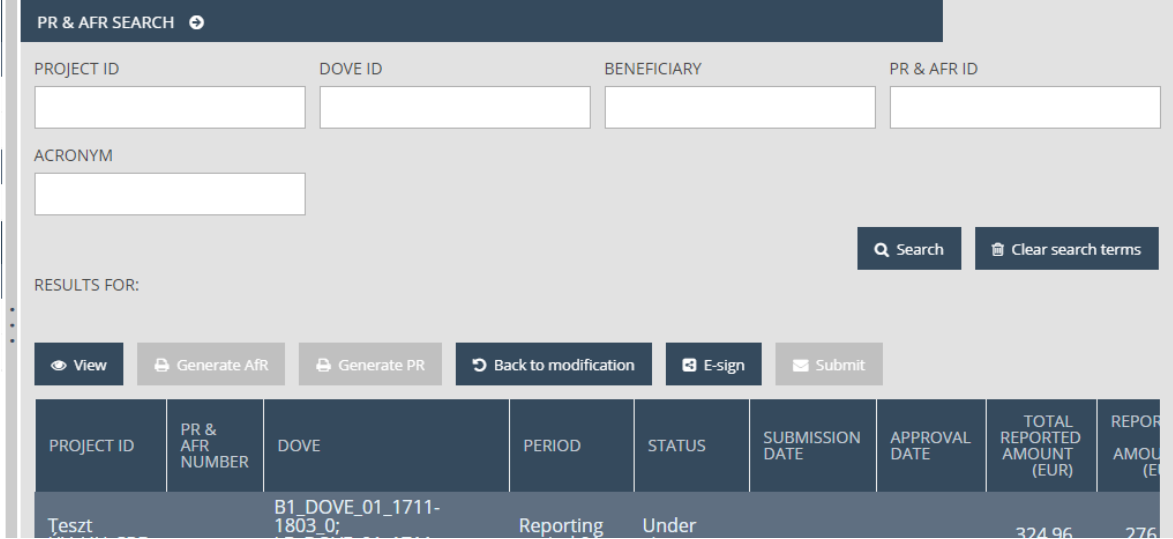


The final project report form can be downloaded from the “PR” and “AfR” folders on the project report’s Documents worksheet at any time after submission – and the previously uploaded documents can be viewed or downloaded from the project report’s Documents worksheet at any time as well. After submission, the Lead Beneficiary can only use the **View** and **Generate application form** functions with regard to the submitted project report.

## 5.6 Digital Signing and Submission of Project Reports – As a Signatory User

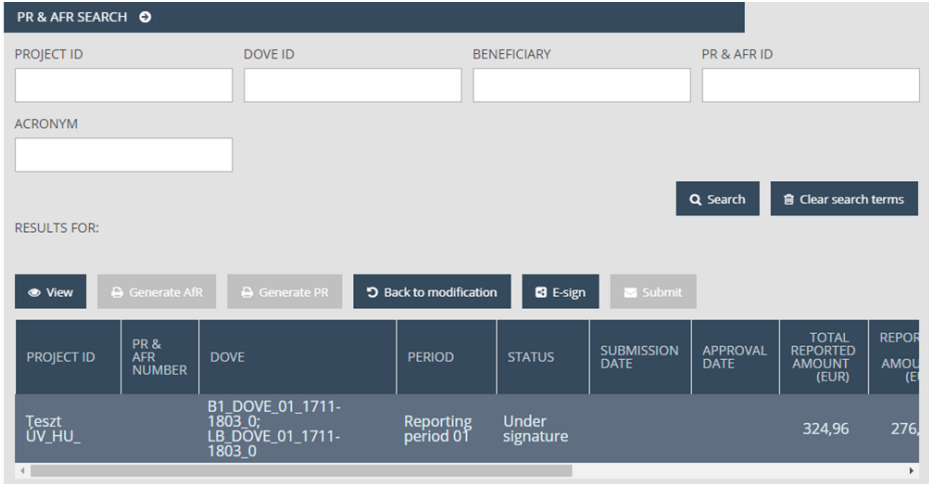
After a project report is saved, it needs to be signed electronically. This can be done as the signatory user assigned to the project.

The signatory user can check the report to be submitted, but the data entry is inactive to the signatory user. If you feel that the data need to be modified before submission, the report has to be sent back for modification to the user who filled it out. To do so, click on the Search menu item of the PR&AfR module in order to open the project-level report search, then click on the row of the project report in question, then on the **Back to modification** button above the hit list.

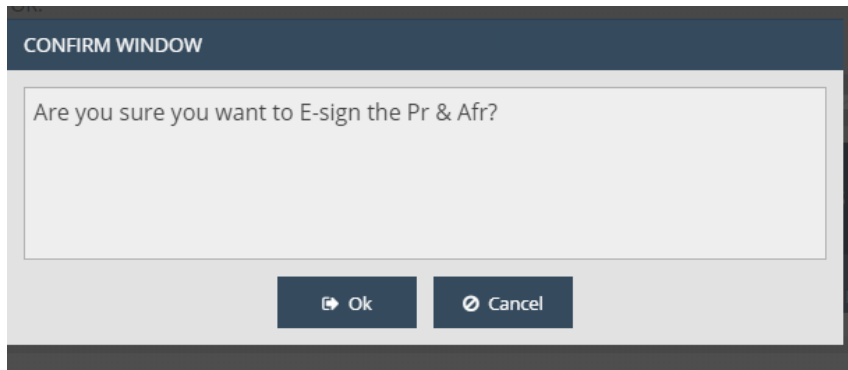


A confirmation window will open, in which the system asks you to confirm that you wish to send the project report back. You can abort the sending back by clicking on Cancel. If you click on OK, the project report is sent back to the reporting user.

To have the report e-signed, click on the Search menu item of the PR&AfR module in order to open the project report search feature, then click on the row of the project report in question, then on the **E-sign** button above the hit list.



A confirmation prompt will open, in which the system asks you to confirm the electronic signing of the project report. You can abort the operation by clicking on **Cancel**. If you click on **OK**, the project report is signed.



PROJECT ID	DOVE ID	PERIOD	STATUS	SUBMISSION DATE	APPROVAL DATE	RE AM
ÚV_Project_11_29	LB_DOVE_01_1711-1803_0	Reporting period 01	Under signature			

After the report is signed, it can be sent for approval. This can also be done by the signatory user assigned to the project. To do so, click on the Search menu item of the PR&Afr module in order to open the project report search feature, then click on the row of the project report in question, then on the **Submit** button above the hit list.

PR & AFR SEARCH

PROJECT ID:  DOVE ID:  BENEFICIARY:  PR & AFR ID:

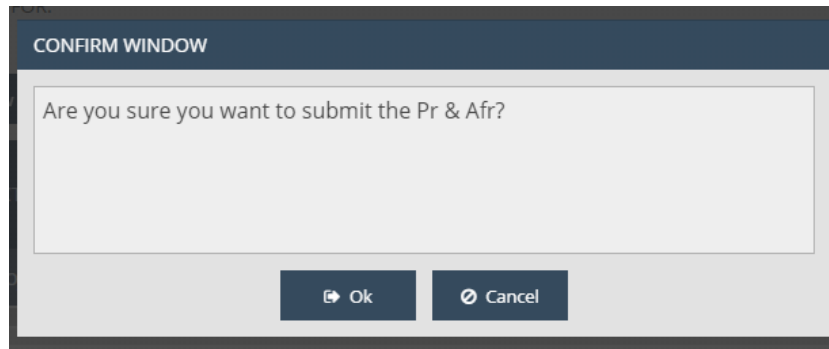
ACRONYM:

Search Clear search terms

RESULTS FOR:

PROJECT ID	PR & AFR NUMBER	DOVE	PERIOD	STATUS	SUBMISSION DATE	APPROVAL DATE	TOTAL REPORTED AMOUNT (EUR)	REPORT AMOUNT (EUR)
Teszt UV_HU_		B1_DOVE_01_1711-1803_0; LB_DOVE_01_1711-1803_0	Reporting period 01	Under signature			324,96	276

A confirmation prompt will open, in which the system asks you to confirm the sending of the project report. You can abort the operation by clicking on **Cancel**. If you click on **OK**, the project report is sent to the Secretariat, and its status is changed to **Submitted**.



If during the technical and financial check, the unit carrying out the control of the submitted project report (PR&Afr) finds faults or issues that need clearing up, it will send the report back for correction. In this case, you will receive a notification by e-mail. After the issues are resolved, the modified report needs to be re-submitted (as described in chapter 5).

If the report is appropriate, it will be accepted. After its acceptance, the Lead Beneficiary is notified via e-mail.

## 5.7 Completion in case of revalidation of the relevant BR

In case the professional unit finds a deficiency or point to be clarified during financial control in the submitted PR&AfR, it is sent back to completion, which you will be notified by e-mail. Upon clarifying the deficiencies you have to resubmit the modified report (as described in section 5).

In case the Secretariat finds a deficiency/irregularity which requires one or more BRs in the project report to be revalidated, the project report is sent back to the beneficiary with an additional tab.

This lets the lead beneficiary to decide, by taking into account the longer time required to revalidate the BR (e.g. because of an irregularity procedure), to “remove” the relevant BR(s) from the PR&AfR and to continue the completion with the data of the other BRs. The BR(s) removed will be included in the next PR&AfR after revalidation is closed by the first level control.

Such a situation occurs, upon receipt of the completion email, the PR&AfR’s status is “Under BR selection”. To complete the task, click on Search in the PR&AfR module to open the PR&AfR search function. Your previously created PR&AfR’s are shown in the hit list; click on the relevant PR&AfR’s line and then on **Modify** above the list.

The screenshot shows the 'PR & AFR SEARCH' interface. It includes search filters for PROJECT ID, DOVE ID, BENEFICIARY, PR & AFR ID, and ACRONYM. Below the filters are buttons for 'Search' and 'Clear search terms'. The 'RESULTS FOR:' section contains action buttons: View, Modify, Delete, Check, Send for signing, Submit BR selections, Generate AFR, and Generate PR. A table displays the search results with the following data:

PROJECT ID	PR & AFR NUMBER	DOVE	PERIOD	STATUS	SUBMISSION DATE	APPROVAL DATE	TOTAL REPORTED AMOUNT (EUR)
SKbematoprojektv85	2	B1_DOVE_02_1608-1611_0; LB_DOVE_02_1608-1611_0	Reporting period 02	Under BR selection	11/01/2018		53 216,83

This opens a table listing the BRs of the PR&AfR.

The screenshot shows the 'PR & AFR DATASHEET' interface. It includes a 'Modify' button and a 'Save' button. A table displays the details of the BRs with the following data:

PR&AFR ID	BENEFICIARY NAME	IN PR&AFR	DOVE	STATUS	NOTE
SKbematoprojektv85/PR&Afr/2	B1 - Ben_SK	<input checked="" type="checkbox"/>	B1_DOVE_02_1608-1611_0	OK	B1 DOVE OK Revalid necessary.
SKbematoprojektv85/PR&Afr/2	LB - LB_HU	<input checked="" type="checkbox"/>	LB_DOVE_02_1608-1611_0	Revalidation	LB DOVE: need reval

The table has the following data:

- **PR&AfR ID** – the ID of the relevant PR&AfR
- **Beneficiary name** – name of the beneficiary
- **In PR&AfR** – in case the check-box is ticked in, the data of the BR are in the PR&AfR
- **DOVE** – number of the DOVE of the BR
- **Status** – status of the BR determined by the Secretariat during completion. In case it is Revalidation, you are required to provide a declaration.
- **Note** – note made by the Secretariat for the BR during completion. You may be informed of the grounds for completion.

You can provide a declaration of removing a BR by selecting the BR and clicking **Modify**.

Please leave the check-box ticked in the pop-up window in case you intend to keep the relevant BR in the PR&AfR. In case you intend to submit the revalidated BR to the Secretariat for approval in a new PR&AfR, please untick the check-box.

After correctly filling the fields on the datasheet, click Save to save the data entered, or click Cancel to abort the operation and return to the previous tab.

To finish this step, please click Search in the PR&AfR module to open the PR&AfR search and select the report, then click **Submit BR selection** above the hit list.

Then the first level control starts the revalidation of the BR.

In case the PR&AfR's status changes to "Need amendment", you can continue the submission of the completion as described in the previous chapters.

## 5.8 The Submission Process

The submission process is summed up by the following flow chart:

