Users' Manual

IMIS 2014-2020 Application Module

for the Applicants of the

**Interreg – IPA Cross-border Co-operation Programme
Hungary- Serbia**

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1 How to use this Manual?

The main objective of this Manual is to provide instructions to the Applicants of the Interreg -IPA - CBC Hungary-Serbia Programme on how to use the IMIS 2014-2020 Monitoring and Information System (hereinafter IMIS 2014-2020). Applications have to be prepared and submitted electronically through IMIS 2014-2020 Application Module (hereinafter Application Module). The Certification generated by the system at the time of submission of the Application is the only document, which must be sent by post to the Joint Secretariat (JS) in one original stamped and signed by each and all Beneficiaries of the partnership. The Application Form itself does not have to be printed. Annexes to the Application Form and required supporting documents must be uploaded into the Application Module (for details, please consult chapter 16).

The Manual

- describes the method of completion and submission of the Applications
- provides practical tips and technical information concerning the online data entry.

Before you start filling in your Application:

- read carefully the Guidelines for Applicants and its annexes of the relevant Call for Proposals in which you plan to submit an Application
- it is highly recommended to get familiar with the Interreg-IPA CBC Hungary-Serbia Co-operation Programme, which is available on the Programme's official website
- make sure that your computer meets all the technical requirements as described in the following chapter (2 - Technical Instructions)
- read carefully the content of this Manual, and get familiar with the screen structure and system logic.

When filling in your Application, please always consult the Manual's relevant chapters in parallel.

2 Technical Instructions

This chapter describes the minimum technical requirements, the general terms of use, as well as the field and button conventions applied within the system.

2.1 Technical requirements

All client computers on which the Application Module run have to meet the following technical requirements:

- Operating system: using a desktop operating system is recommended (e.g. Microsoft Windows)
- Resolution: 1280*768 or higher
- Browser: Mozilla Firefox 46.0.1 and above, Google Chrome 50.0 and above, Internet Explorer 11.0 and above
- Cookies must be enabled in your browser
- PDF reader (e.g.: Adobe Reader).
- Document management software (e.g.: Microsoft Office) to open .DOC and .DOCX files.

- Internet connection

2.2   General terms of use

- IMIS 2014-2020 is an internet based system; any disruption in the internet connection may interrupt the communication between the server and the client computer. In such cases your screen will turn grey, and the the following warning message is displayed: "Server connection lost, trying to reconnect…'. The session will resume once your internet connection is restored, unless the available timeframe expires in the meantime. In this case, try to log in once again.

- If you have been inactive for more than 60 minutes (no data recording, no clicks, etc. occur within this time), the system automatically interrupts the communication between the client and the server computer, and the following message is displayed: 'Session expired…'. To resume your work, press 'Esc' and log in once again.

- Please take into account that only 1 user is allowed to work on an Application at once. Parallel sessions need to be avoided (e.g. one person is recording financial data, while the other is completing the narrative parts at the same time). This kind of parallel use can lead to confusion, and it may result in the corruption and loss of important data.

2.3   Field conventions

The system uses multiple types of fields that possess specific features and require different methods of use.

- Fields on a grey background – read-only fields, usually filled in or calculated automatically by the system, or displaying values entered earlier by the user on other sheets,e.g.:

APPLICATION ID

HUSRB/1602/12/0004

- Fields on a white background – normal data entry fields,e.g.:
- Fields on a white background within a red frame – these types of fields are similar to normal data entry fields, only that they are mandatory to fill in. Fields containing errors are also highlighted by red.

OFFICIAL NAME (IN ORIGINAL LANGUAGE) !

- By moving the mouse cursor over the field, a tooltip containing the validation rule appears,e.g.:

OUTCOME !

Validation error! Application: Outcome: Outcome name must be filled!

ACTIVITY !   DESCRIPTION !   LOCATION !

- Drop-down list – these fields contain a pre-defined list of values. When clicking the down-arrow, the list of values is displayed on the screen, out of which the user can select the one to be recorded by the system, e.g.:

TITLE

- Date fields – a specific date can be either typed in according to the day/month/year (e.g. 20/06/2016) format, or selected by clicking the calendar icon,e.g.:

START OF PROJECT

- Fields which open pop-up forms – fields that are connected to a pop-up form are marked with a blue frame when the mouse cursor is moved over them. By clicking on this type of field a pop-up form appears, where the value of the given field can be defined,e.g.:

PROJECT ACRONYM

## 3   How to access the IMIS 2014-2020 Front Office?

Applications can be compiled and submitted through the Application Module.

- The Application Module of the Interreg - IPA - CBC Hungary-Serbia Programme can be accessed through the following link:
  https://imis2014-2020.eu/imis-web/public#!foAppSrbLogin.
  The language of the system is English.
- Auto save is not performed in the background on the module screens, however a Save option is available on each screen.
- The application submission process can be interrupted conveniently at any point during filling in. Please, always press the Save button whenever you interrupt the filling in process.

The functionalities and features of the Application Module are described in details in the following chapters.

3.1 Login

- Please, click on the IMIS 2014-2020 link to access the screen below. To begin your registration, click on the 'Registration' link.
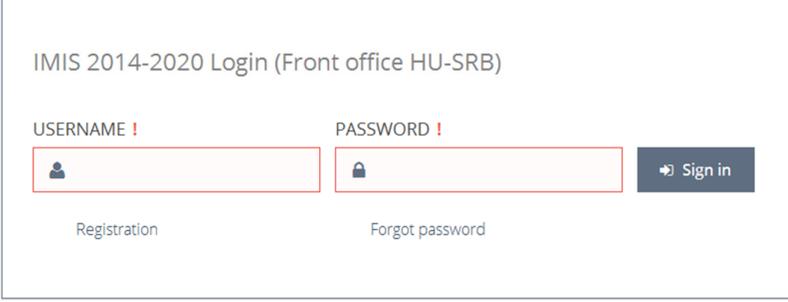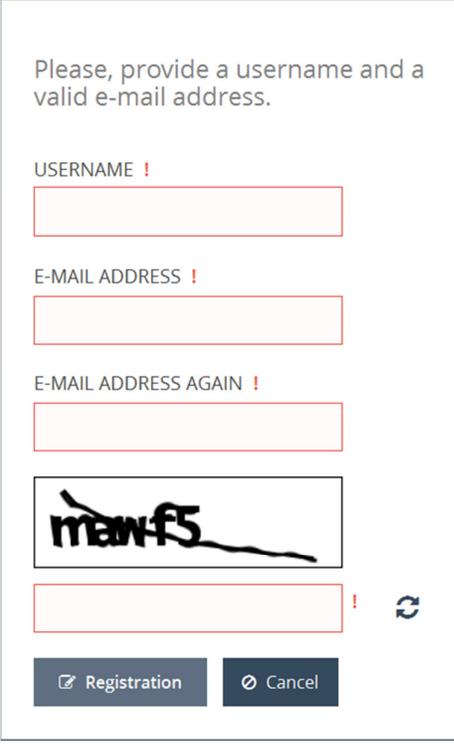

- As a result, the following screen appears:

- Please, enter a personal Username, a valid e-mail address and the verification code (Captcha) displayed on the screen, then click on the Registration button. Following this, you receive an e-mail with your temporary password. This e-mail is automatically generated by the system; it may take up to 5-10 minutes to receive it to your mailbox.
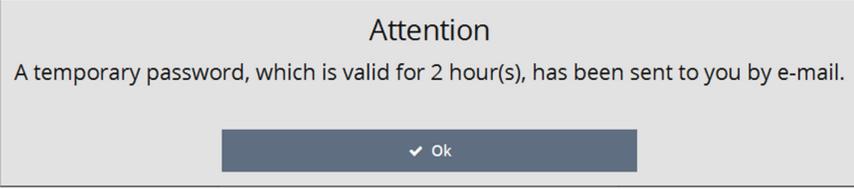
- Once you receive your password, open the IMIS 2014-2020 link in your internet browser again and enter your username and the temporary password. Then please, click on 'Sign in'. Note: the password is only valid for a limited period of time; you need to sign in within 2 hours from receiving it. If more than two hours have passed from the receipt of the e-mail, you will need to register again.

- Your password must be changed upon the first login (type in again your old (temporary) password, then choose a new password and enter it twice in the two fields labelled 'New password' and 'New password again'. Your new password must contain at least 8 characters, and include not only lower and upper case letters but numbers as well. This password can be changed at any time on the opening screen of the Application Module through the 'Change Password' function.
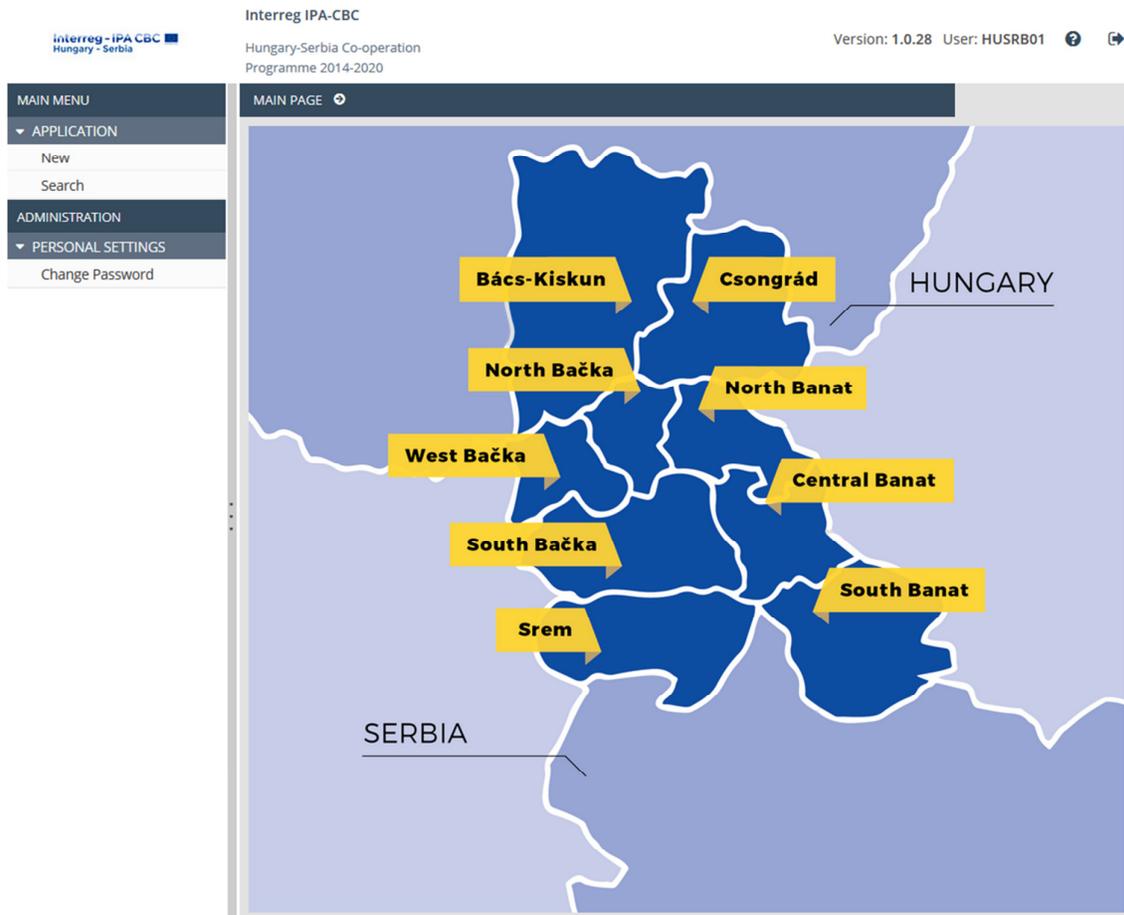

- Should you forget your password, please use the 'Forgot password' link on the IMIS 2014-2020 login screen. To receive your new temporary password, you must enter your username and the verification code generated by the system (Captcha).

3.2 Menu structure

Once you have managed to log in, the Application Module opens:

The menu items on the left side of the screen (sidebar) are grouped in two sections, as follows:

- **Application** – this section enables the initiation of new Applications and the search between the finalized or started Applications, while it allows for the initiation of further Application related interactions.
  - ◦ **New** – you can initiate the preparation of a new Application with this button. Whenever you click on New, the system creates a new Application. Please, always check in the Search section whether you have already started an Application.
  - ◦ **Search** – you can view all your Applications here regardless of their current status: under preparation, submitted, approved, under completion, rejected.
- **Personal Settings** – you can modify your password in this section.
  - ◦ **Change password** – when you click this menu item, the password modification screen appears.

Sections on the sidebar can be opened or closed by selecting the small arrows located next to each section name. The sidebar can be closed by clicking on the vertical grey line on right side of the menu bar, allowing thus the extension of the working area, and can be reopened the same way.

The user guide can be accessed by selecting the ❓ icon located in the upper right corner of the screen, while the ➡ icon serves for user log out, following confirmation.

4 How to prepare your Application?

In order to create a new Application, please select New in the 'Application' section of the menu bar. The system opens the 'New Application' datasheet. The upper section of the screen contains an 'Information reminder' section containing information about the cooperation programme.

Please select the name of the call for proposals for which you would like to submit an Application in the drop-down list of the 'Call for Proposals Name'. Proceed with the selection of the relevant priority axis in the 'Priority axis' field, and respectively with the action in the 'Action' field. To make sure the selection of the fields is correct; please consult the Guidelines for Applicants. The creation of the Application can be initiated by clicking on the Start button located in the upper right corner of the screen, while the creation can be interrupted with the Cancel button.

After having started filling in an Application, you can any time beeak the process by pressing Save and leaving the Application Module. In case you would like to continue to fill in your Application, you need to click on Search in the 'Application section' of the sidebar.

The result list of Search is empty by default and all function buttons (View, Modify, Drop, Generate Application Form, Check application, Submit & generate certification) are inactive until the list is empty, or the Applicant selects an item in the list by clicking on it. You can continue your work by clicking on your Application and pressing Modify next.

(The operation of the function buttons available on the result screen of Application Search is detailed in Chapter 5, Chapter 6 and Chapter 7 of the Manual.)

Practical notes:

- **The Application consists of several sheets** (the functioning of all sheets is described in details in this Manual) among of which you can navigate with the left and right arrows below the 'Information reminder' section.

- **It is strongly advised to start the completion of the Application Form by filling in the order of the different sheets** (i.e. General Data, Beneficiaries, Partnership, etc.), since some of the entered data (e.g. abbreviated name of the Beneficiary, role of the Beneficiary, etc.) will be automatically transferred and used in other sheets.
- **Some sheets of the Application are long and consequently might not fit into the screen of your computer.** Please always make sure that you filled in all fields of the sheet by scrolling down to the bottom.

General remark: All descriptions should be written in a **clear and concise way**, which will allow assessors to understand the content and concept of the project. Please, avoid lengthy explanations; try to be as concise as possible in order to fit the text into the given cells, having in mind the character limit.

4.1 Information reminder

If you click on the arrow below the `Save` button, the 'Information reminder' opens which contains relevant information regarding the Call for Proposals and your Application. You can open and close the 'Information reminder' by clicking on the arrow any time during your work.

Below the 'Information reminder' the name of the sheets are listed where you can enter all necessary information of your Application.

4.2 General Data sheet

Here you can enter the main data of your Application.

Please click in the 'Project title' or 'Project acronym' fields and enter the title and acronym in the pop-up window. The title of your project should be expressive and concise, while the acronym should be maximum 30 characters long. The acronym serves for the identification of your project hereinafter. Please save the data by pressing the Save button.

In order to enter the desired duration of your project, please press Define button and insert the relevant dates in the pop-up window. Provide the start date in the 'Start of project' field (click the

icon, if you wish to select the date from the calendar), then enter a value in month in the 'Duration' field. The 'End of project' field is calculated automatically. Data can be saved by pressing the Save button.

4.3 Beneficiaries sheet

This sheet serves to fill in the administrative data of Beneficiaries of the Application by using the following function buttons:

- **New** – creates a new Beneficiary.
- **Modify** – modifies an existing Beneficiary.
- **Delete** – deletes an existing Beneficiary.
- **Order** – sets the order of the uploaded Beneficiaries.
- **View** – opens the datasheet of the selected Beneficiary in view mode.

The table listing the Beneficiaries is empty by default and all function buttons (View, New, Modify Delete Order) are inactive until the list is empty, or the Applicant selects an item in the list by clicking on it. Please press New in order to start entering the data of a Beneficiary. Subsequently, the Beneficiary datasheet appears displaying the first sheet to fill in called 'Beneficiary data'.

The fields of the Beneficiary datasheet can be divided into four main parts:

- General data of the Beneficiary;
- Official address;
- Branch Office Address, and
- Mailing address.

Please note that his sheet does not fit into the screen, in order to be able to fill in each field, please scroll down.

In the first section the following fields appear:

- **Beneficiary ID** – unique identification number of the Beneficiary generated by the system automatically.
- **Role in partnership** – the role of the particular Beneficiary in the partnership, generated by the system automatically (can be later modified by using the 'Order function' button).
- **Type of institution** – please select an institution type from the drop-down list.
- **Official name (in original language)** – please type here the official name of the Beneficiary in original language.
- **Official name (in English if exists)** - please type here the official name of the Beneficiary in English. In case your organization does not have an official name in English, please translate the name of your organization into English.
- **Abbreviated name** - please create and put here a short name of the Beneficiary. This abbreviation is used for quick and easy identification the Beneficiary.
- **Country** – please select the country of origin of the Beneficiary from the drop-down list.
- **National tax number** – please enter here the national tax number of the Beneficiary (this field can be edited only after the 'Country' field is filled in).
- **Registry number** – please enter here the registry number of the Beneficiary.
- **Community tax number** – please enter here the community tax number of the Beneficiary (if relevant).
- **Legal status** – please select one element from the drop-down list.
- **Date of foundation** – please enter the date of foundation of the Beneficiary organization. In case of selecting the date of foundation, please use the ![icon] icon.
- **Founder organization** – please enter here the name of the founder organization (if relevant).
- **Website** – please enter here the official website of the Beneficiary (if relevant).

The following fields are displayed in the 'Official address' section:

- **NUTS III or equiv.** – please select here one element from the drop-down list of counties/NUTS III equivalent territorial units. Move the down and up arrows on the top and bottom of the list, to view the entire list of elements.
- **Postal code** – please enter here the postal code.
- **Settlement** – please enter here the settlement.
- **Street** – please enter here the street.
- **Number** – please enter here the number.
- **PO box** – please enter here the PO box number.

'Branch Office Address' and 'Mailing address' sections can be controlled with a checkbox, and are ticked in by default. In case the 'Branch Office address' and the 'Official Address' are identical, please leave the '**Please tick if the headquarters of the organization is registered in the prog. area!**' checkbox ticked in.

In case the 'Branch Office address' and the 'Official address' differ, remove the tick from the '**Please tick if the headquarters of the organization is registered in the prog. area!**' checkbox and fill in the branch office data according to the procedure described in the 'Official address' section.

In case the 'Mailing address' and the 'Official address' are identical, please leave the '**Please tick if the mailing address is the same as the official address!**' checkbox ticked in. In case the 'Mailing address' and the 'Official address' differ, remove the tick from the '**Please tick if the mailing address is the same as the official address!**' checkbox and fill in the mailing address data according to the procedure described in the 'Official address' section.

BRANCH OFFICE ADDRESS

PLEASE TICK IF THE HEADQUARTERS OF THE ORGANIZATION IS REGISTERED IN THE PROG. AREA!

☐

| COUNTRY ! | NUTS III OR EQUIV. ! | POSTAL CODE ! | SETTLEMENT ! |

| STREET ! | NUMBER ! | PO BOX ! |

MAILING ADDRESS

PLEASE TICK IF THE MAILING ADDRESS IS THE SAME AS THE OFFICIAL ADDRESS!

☐

| COUNTRY ! | NUTS III OR EQUIV. ! | POSTAL CODE ! | SETTLEMENT ! |

| STREET ! | NUMBER ! | PO BOX ! |

After filling in data in line with the guides, please continue with the 'Legal represent./Contact person' sheet of the Beneficiary datasheet. This sheet serves for entering the data of the legal representative and the contact person of the Beneficiary.

BENEFICIARY DATASHEET   ✕

💾 Save   ⊘ Cancel

BENEFICIARY DATA   LEGAL REPRESENT./CONTACT PERSON   FINANCIAL CAPACITY   MANAGEMENT EXP.

CHAPTER 2. PARTNERSHIP

LEGAL REPRESENTATIVE (STATUTORY)

| TITLE | FIRST NAME ! | MIDDLE NAME | LAST (FAMILY) NAME ! |

| SUFFIX | NAME |

| PHONE NUMBER ! | MOBILE PHONE NUMBER ! | E-MAIL ADDRESS ! | POSITION ! |

Contact person

PLEASE TICK IF THE CONTACT PERSON SAME AS THE LEGAL REPRESENTATIVE!

☑

The following fields are displayed:

- **Title** – please select an item from the drop-down list.
- **First name** – please enter the first name of the legal representative.
- **Middle name** - please enter the middle name of the legal representative (if relevant).
- **Last (family) name** - please enter the last (family) name of the legal representative.
- **Suffix** - please enter the suffix of the legal representative (if relevant).

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- **Name** – the full name is filled in automatically by the system according to the entered data.
- **Phone number** – please select the country code from the drop-down list first, then enter the phone number of the legal representative in the next field.
- **Mobile phone number** - please select the country code from the drop-down list first, then enter the mobile phone number of the legal representative in the next field. Providing at least one of the two phone numbers is compulsory.
- **E-mail address** – please enter here the e-mail address of the legal representative.
- **Position** – please enter here the position of the legal representative.

Please leave the '**Please tick if the contact person is the same as the legal representative!**' checkbox ticked in case the contact person is the same as the legal representative. In case the two persons differ, please remove the tick form the checkbox and enter the data of the contact person according to the procedure detailed in 'Legal representative' section.

After filling in data in line with the guides, please proceed to the 'Financial capacity' sheet in order to start entering the data related to financial capacity of the Beneficiary.

The following fields are displayed for filling in related to the given Beneficiary:

- **Number of staff** – please enter the number of employees.
- **Data in currency** – please select one of the items in the drop-down list depending on the currency in which you would like to provide the financial data.
- **Last closed budgetary year** – please select the last closed budgetary year of the Beneficiary.
- **Last closed budgetary year annual revenue** – please type in the amount of annual revenue realised in the last closed budgetary year.
- **Last closed budgetary year balance sheet total** - please type in the total balance sheet amount of the last closed budgetary year.
- **Last closed budgetary year result** - please type in the result of the last closed budgetary year.
- **Second to last closed budgetary year** – the field is filled in automatically with the year preceding the year choosen in the 'Last closed budget year' field.
- **Second to last closed budgetary year annual revenue** - please type in the amount of annual revenue of the second to last closed budgetary year.
- **Second to last closed budgetary year balance sheet total** - please type in the total balance sheet amount of the second to last closed budgetary year.

- **Second to last closed budgetary year result** - please type in the result of the second to last closed budgetary year.
- **Awarded de minimis grant in current and the previous two financial year (EUR)** – please insert the amount of de minimis grant received in the current and the previous two financial years (EUR).

After having completed correctly the 'Financial capacity' sheet, please press Save and proceed to the 'Management experience' sheet. Here optional information can be entered concerning previous project management experiences of the Beneficiary:

- **New** – creates new item.
- **Modify** - modifies existing item.
- **Delete** – deletes existing item.
- **View** – opens data of the already entered Beneficiary in read-only mode.

The table is empty by default and all function buttons (View, New, Modify Delete) are inactive until the list is empty, or the Applicant selects an item in the list by clicking on it. To add the relevant management experience items of the given Beneficiary, please press New. On the opening 'Management experience' datasheet please provide information on the previous experience (role) of the given Beneficiary in *any* previous projects (possibly similar to the currently proposed activity) supported over the past five years in the relevant fields covered by the present CBC Programme.

The 'Management experience' datasheet contains the following fields:

- **Guide** – guidelines containing short instructions how to fill in the current sheet, provided by the system.
- **Role in the project** – please indicate the role played in the project.
- **Title of project** – please fill in the title of the project.
- **Identification number of the project** - please enter the project ID.
- **Name of programme providing the subsidy** – please fill in the name of the programme providing the financing for the project.
- **Total budget of project (EUR)** – please fill in the total budget of the project in euro.
- **Brief summary of the project** – please describe your project in brief.

Information can be saved by clicking on Save, while the Cancel button interrupts the creation of an item. In case you wish to provide information about more Management experience items, please repeat the above steps (starting with press New, see previous page) as many times as necessary.

When all data concerning the Beneficiary are completed, you can save the Beneficiary data by clicking on Save. Consequently, the Beneficiary will be listed on the Beneficiaries sheet.

By selecting one of the items in the list, the user has the possibility to modify (upon pressing Modify), to view (View button) or to delete (Delete button) the Beneficiary and its data, but only after confirmation.

To add more Beneficiaries to the Application, the above steps (described in chapter 4.3) need to be repeated as many times as required. Should the user reach the maximum number of Beneficiaries

allowed for an Application, the system displays an error message informing the user that no additional Beneficiaries can be added to the respective project.

In case there are more Beneficiaries added to a project, the user has the possibility to rearrange the order of the Beneficiaries within the project by clicking on Order and making the selections in the pop-up window that opens subsequently.

> **NOTE!**
> Before leaving the current sheet always make sure you have all the mandatory cells filled in. Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.4   Partnership sheet

This sheet serves for the description of the role of each Beneficiary in the project according to the followings:

- **Description of joint project management experience of Beneficiaries** – please provide a summarized description of joint project management experiences of the partners in the pop-up window that appears by clicking the description field. In case there was no former cooperation between the Beneficiaries, please provide information on other (i.e. not EU co-financed) project management experiences of the Beneficiaries.

Press Save in order to store the information you have provided. If you click on the Cancel button, you have the possibility return to the previous screen without saving the data you have entered.

Below the 'Project experience description' field, you can find a table, which contains the list of Beneficiaries (after having added all Beneficiaries, before that the table is empty). Here you can add a detailed description of the role and operational capacity of each Beneficiary concerning the present Application.

- **Modify** – enables you to provide new descriptions or to modify the existing ones concerning the selected Beneficiary.
- **View** – opens the descriptions entered per Beneficiary in read-only mode.

The function buttons (View and Modify) are inactive until the Applicant selects an item in the list by clicking   on   it

After selecting the relevant Beneficiary from the table, you have the possibility to press Modify in order to provide new descriptions or to modify the existing ones, or to press View to open the descriptions in view mode.

After you press Modify, the 'Detailed description' datasheet opens containing the following fields:

- **Beneficiary name** – the name of the selected Beneficiary, filled in by the system automatically.
- **Role in partnership** - the role of the selected Beneficiary, filled in by the system automatically.
- **Detailed description of the role in this project** – Please describe how the members of the partnership will contribute to the content of the project. Avoid the duplication of functions and draw a clear picture about the responsibilities in connection with the planned activities.
- **Detailed description of operational capacity in this project** - Provide information on the operational capacity of the selected Beneficiary in this project, such as: human resources, technical conditions, professional capacities, supervision of external management services if relevant, etc..

Please fill in the required data of each Beneficiary in line with the steps described above.

Press Save in order to store the information you have provided. If you click on Cancel, you have the possibility to return to the previous screen without saving the data you have entered.

> NOTE!
> Before leaving the current sheet always make sure you have all the mandatory cells filled in.
> Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.5   Project description sheet

This sheet intends to provide a detailed description regarding each key aspect of the project, and it contains the following function buttons:

- **Modify** – add new descriptions or modify the existing ones.

Select one key aspect, and then click on Modify (before selecting any item the Modify button is inactive). The Project description datasheet appears displaying the following fields:

- **Key Aspect** – the title of the topic to be explained, provided by the system.
- The detailed description of the selected key aspect should be entered into the description field.
- **Guide** – guidelines containing short instructions how to fill in the current sheet, provided by the system.

When filling in the description fields, please always read the related guides.

Press Save in order to store the information you have provided. If you click Cancel, you have the possibility return to the previous screen without saving the data you have entered.

It is obligatory to provide a description to all the key aspects, therefore please follow the above steps to provide a description for each key aspect required.

> NOTE!
> Before leaving the current sheet always make sure you have all the mandatory cells filled in.
> Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.6 Objectives sheet

This sheet gives you the possibility to define or to modify the project's main objective, the programme-level indicator and the related horizontal principles.

The selected **Priority axis** and **Action** are displayed in the upper part of the screen for your information. Please describe the project's main objective and how the project's main objective contributes to the programme-level specific objective in the pop-up windows that appear by clicking in the '**Projects main objective (please describe the projects main objective in the field below)**' and '**Please describe how the projects main objective contributes to the programme-level specific objectives**' description fields.

Please fill in both of the description fields described above, and save the information you have provided by clicking on Save. If you click Cancel, you have the possibility return to the previous screen without saving the data you have entered.

After having entered the project's main objective and how the project's main objective contributes to the programme-level specific objective, please scroll down on the 'Objectives' sheet in order to define 'Programme-level output indictors' and 'Horizontal principles' which your project contributes to.

At the bottom part of the sheet, the following functions are available both for 'Programme-level output indictors' and for 'Horizontal principles':

- **New** – adds a new indicator.
- **Modify** – modifies the selected indicator.
- **Delete** – deletes the selected indicator.
- **View** – opens the datasheet of the selected indicator in read-only mode.

View, Modify and Delete buttons are inactive until the list is empty, or the Applicant selects an item in the list by clicking on it.

Both tables displaying the list of items for 'Programme-level output indicators' and for the 'Horizontal principles' are empty by default, and all function buttons (View, New, Modify Delete) are inactive until the list is empty, or the Applicant selects an item in the list by clicking on it.In order to add Programme-level output indicator(s) to your Application, please press New. As a result, a pop-up window appears containing the following fields:

- **Guide** - guidelines containing short instructions how to fill in the current sheet, provided by the system
- **Programme output indicator** - please select one indicator from the drop-down list (if only one indicator is available for selection in the Action your partnership would like to apply for funding, this field ise automatically filled in by the system).
- **Unit** – the measurement unit is automatically filled in by the system according to the selected indicator.
- **Base value** – please set the base value of the selected indicator (maximum 6 decimals are allowed).
- **Target value** – please set the target value of the selected indicator (maximum 6 decimals are allowed).
- **Source(s) of verification** – please specify the source of verification for the selected indicator.
- **Please describe…**- please provide a detailed description according to the specific question.

PROGRAMME-LEVEL OUTPUT INDICATOR DATASHEET

💾 Save   ⊘ Cancel

GUIDE

From the dropdown menu, please select at least one Programme-level Indicator to which your project will contribute. Though you can choose more than one indicator, please keep the number of selected indicators to a minimum.

PROGRAMME OUTPUT INDICATOR !

UNIT !   BASE VALUE !   TARGET VALUE !

SOURCE(S) OF VERIFICATION !

PLEASE DESCRIBE HOW THE PROJECT WILL CONTRIBUTE TO THE PROGRAMME-LEVEL OUTPUT INDICATOR (MAX. CHAR: 300) !

Press Save in order to store the information you have provided. If you click on Cancel, you have the possibility return to the previous screen without saving the data you have entered.

In order to add Horizontal principle(s) to your Application, please press New. As a result,the 'Horizontal principle' datasheet appears in a pop-up window, containing the following fields:

- **Guide -** guidelines containing short instructions how to fill in the current sheet, provided by the system
- **Horizontal principle** - please select one Horizontal principle from the drop-down list).
- **Name** - please define the name of the indicator.
- **Unit** - please define the measurement unit of the indicator.
- **Base value** - please set the base value of the defined indicator (maximum 6 decimals are allowed).
- **Target value** - please set the target value of the defined indicator (maximum 6 decimals are allowed).
- **Source(s) of verification** - please specify the source of verification for the defined indicator.
- **Please define...** - please provide a detailed description according to the specific question.

Press Save in order to store the information you have provided. If you click Cancel, you have the possibility return to the previous screen without saving the data you have entered.

4.7 Outcomes sheet

On this sheet, you need to provide the list of planned outcomes and project activities. The table is empty by default; the list of activities appears after saving the data. The function buttons of the table are the followings:

- **New** - creates a new outcome/activity.
- **Modify** - modifies the selected outcome/activity.
- **Delete** - deletes the selected outcome/activity
- **View** - opens the selected outcome/activity in read-only mode.

View, Modify and Delete function buttons are inactive until the list is empty, or the Applicant selects an item in the list by clicking on it.

Please start by filling in the requested data related to your planned activities. The maximum number of Outcomes to be added to an Application is four. Use the New button above the list to add each Outcome. The Outcomes datasheet pop-up window, which appears as a result, contains the following fields:

- **Guide** - guidelines containing short instructions how to fill inthe current sheet, provided by the system
- **Outcome** - please type here the name of the outcome. The name should be short and clearly refer to the content of the outcome.
- **Activity** - please type here the name of the activity. The name should be short and clearly refer to the content of the activity.
- **Description** - please provide here a short description of the essemce of the planned activityand, describe why it is crucial in achieving the project objectives.
- **Location** – Identify the exact geographical location of the planned activity as precisely as possible (settlement, address, topographical number etc.)..

Adding more activities – the maximum number of activities per outcome is five. The number of data fields of activities (Activity, Description and Location) are displayed accordingly. When entering the planned activities, please take into consideration that 'Project management activities' will be added to the list of activities (please consult screen shot of 'Activity plan' sheet below in chapter 4.8) automatically by the system as 'Activity 0', since management activities cannot be connected directly to one single Outcome.

- **Name of indicator** - please type here the name of the indicator.
- **Type** - please select the type of the indicator from the drop-down list.
- **Unit** - please type here the measurement unit of the indicator.
- **Base value** - please set the base value of the indicator.
- **Target value** - please set the target value of the indicator.
- **Source(s) of verification** - please specify here the source of verification of the given indicator.

Please also read the related guides!

Press Save in order to store the information you have provided. If you click on Cancel, you have the possibility return to the previous screen without saving the data you have entered. Please upload all outcomes, activities and indicators of the project by following the steps described above.

The 'Outcomes' sheet contains the list of defined outcomes. By selecting one of the items in the list, the user has the possibility to modify (upon selecting Modify), to view (View button) or to delete the given outcome (Delete button), but only after confirmation.

> NOTE!
> Before leaving the current sheet always make sure you have all the mandatory cells filled in.
> Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.8 Activity plan sheet

The purpose of this sheet is to link the entered activities to Beneficiaries and to relevant reporting periods according to their scheduled implementation. The system generates a table with the combination of activities and Beneficiaries and lists them here. 'Project management activities' are added to the list of activities automatically by the system as 'Activity 0' and linked to all Beneficiaries, since all partners have this responsibility.

Please add at least one reporting period to each activity and Beneficiary by ticking the relevant checkbox.

Please note that each activity needs to be linked to at least one reporting period and at least one Beneficiary.

The Activity plan sheet does not contain a Save function button, therefore after you filled it in, please continue with the 'Information and Publicity' sheet.

> NOTE!
> Before leaving the current sheet always make sure you have all the mandatory cells filled in.
> Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.9 Information and publicity sheet

On this sheet you have to describe how the Beneficiaries of the project plan to implement the information and publicity activities. The table is empty by default and the View, Modify and Delete function buttons are inactive until the list is empty, or the Applicant selects an item in the list by clicking on it. The information and publicity activities will appear in the table after you added them by using the New button. Above the table you can find the following function buttons:

- **New** - creates a new information and publicity activity.
- **Modify** - modifies the selected information and publicity activity.
- **Delete** - deletes the selected information and publicity activity.
- **View** - opens the datasheet of the selected information and publicity activity in read-only mode.

If you click on New, the Information and publicity datasheet appears in a pop-up window containing the following fields:

- **Type** - please select the type of the information and publicity activity from the drop-down list.
- **Communication Tool** - please select the communication tool from the drop-down list or specify it by filling in the text field (depending on the selected 'Type' the list of tools was pre-defined or not).
- **Language** - please select the language of the communication tool from the drop-down list.
- **Beneficiary** - the abbreviated names of all the Beneficiaries are displayed together with a checkbox. Please select the Beneficiaries who participate in the implementation of the given information and publicity activity, and also bear the cost and responsibility for the implementation.
- **Description** - please provide a description for the given information and publicity activity.
- **Target group(s)** - please specify the target groups of the given information and publicity activity.
- **Reporting period** - the reporting periods of the project are displayed together with a checkbox. Please select the relevant reporting periods for the given information and publicity activity.
- **Guide** - guidelines containing short instructions how to fill in the current sheet, provided by the system.

Please read the related guides as well!

Press Save in order to store the information you have provided. If you click Cancel, you have the possibility to return to the previous screen without saving the data you have entered. Please upload each information and publicity activity of the project by following the steps described above.

By selecting one of the items from the list of Information and publicity activities inserted into the Application, the user has the possibility to modify (upon selecting Modify), to view (View button) or to delete (Delete button) the given outcome, but only after confirmation.

> NOTE!
> Before leaving the current sheet always make sure you have all the mandatory cells filled in.
> Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.10 Communication approach sheet

This sheet serves for the description of the communication approach you plan to apply within your Application. To this end, you are required to answer a pre-defined set of questions one by one.

The only function button active above the table on this sheet is the following (but it is active only, if Applicant selected an item in the list by clicking on it, otherwise it is inactive):

Modify – use it to add a new answer to one of the listed questions or modify your previous answers.

To fill in the answers, you must first select an item from the list, and then press Modify. Subsequently, the 'Communication approach' datasheet appears containing the following fields:

- **Question** – the question is filled in automatically by the system
- **Explanation** – please type here the answer to the selected question

Press Save in order to store the information you have provided. If you click Cancel, you have the possibility return to the previous screen without saving the data you have entered.

Please provide answer to each question by following the steps described above.

> **NOTE!**
> Before leaving the current sheet always make sure you have all the mandatory cells filled in.
> Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.11 Project budget sheet

The purpose of the 'Project budget' sheet is to build up your detailed budget plan.

Please start data entry manually on Beneficiary level, and take note that the project budget will be aggregated by the system automatically on the basis of the Beneficiary level data. Compulsory fields are red framed.

The Project budget sheet is divided into two parts:

- The upper table contains the list of Beneficiaries.
- The lower table contains a budget table per budget lines on Beneficiary level. The planned budget of the Beneficiaries is automatically aggregated by the system, and it is displayed per Beneficiary in the Total cost row and per budget lines in the Total budget (EUR) column.

APPLICATION SEARCH ⊘	APPLICATION FORM ⊘				🖫 Save

INFORMATION REMINDER

OUTCOMES   ACTIVITY PLAN   INFO AND PUBLICITY   COMM. APPROACH   PROJECT BUDGET   SOURCES OF F   ❮ ❯

CHAPTER 7. BUDGET - PER BENEFICIARY

✏ Modify budget by beneficiary

BENEFICIARY ABBREVIATED NAME	ROLE	COUNTRY
TEST LB	Lead Beneficiary	Hungary
TEST PARTNER	Beneficiary 1	Serbia

CHAPTER 8. BUDGET - SUMMARY

BUDGET LINES	LB - TEST LB	B1 - TEST PARTNER	TOTAL BUDGET (EUR)	SHARE (%)
1. Preparation costs	0,00	0,00	0,00	0
1.1 Technical plans	0,00	0,00	0,00	0
1.2 Costs of permits	0,00	0,00	0,00	0
1.3 Purchase of land	0,00	0,00	0,00	0
1.4 Studies, statistics, databases and researches	0,00	0,00	0,00	0
1.5 Project meetings and travel costs	0,00	0,00	0,00	0
1.6 Translation and interpretation costs	0,00	0,00	0,00	0
2. Staff costs	0,00	0,00	0,00	0
2.1 Salary of staff - direct project management	0,00	0,00	0,00	0
2.2 Salary of staff - professional team members	0,00	0,00	0,00	0
3. Office and administrative expenditure	0,00	0,00	0,00	0

4. Travel and accommodation costs	0,00	0,00	0,00	0
4.1 Travel cost of project staff	0,00	0,00	0,00	0
4.2 Accommodation costs of project staff	0,00	0,00	0,00	0
4.3 Per diems of the project staff	0,00	0,00	0,00	0
5. External expertise and services costs	0,00	0,00	0,00	0
5.1 Technical plans	0,00	0,00	0,00	0
5.2 Studies, statistics, databases and researches	0,00	0,00	0,00	0
5.3 Events, conferences, seminars, project meetings	0,00	0,00	0,00	0
5.4 Services related to project management, procurement procedures	0,00	0,00	0,00	0
5.5 Costs of supervisor of engineering	0,00	0,00	0,00	0
5.6 Costs related to publicity, promotion and communication	0,00	0,00	0,00	0
5.7 Other services	0,00	0,00	0,00	0
6. Equipment expenditure	0,00	0,00	0,00	0
6.1 Purchase of new equipment	0,00	0,00	0,00	0
6.2 Rent of equipment	0,00	0,00	0,00	0
7. Infrastructure and works	0,00	0,00	0,00	0
7.1 Construction of buildings, works, infrastructure	0,00	0,00	0,00	0
7.2 Reconstruction, renovation of buildings, works, infrastructure	0,00	0,00	0,00	0
7.3 Purchase of land	0,00	0,00	0,00	0
TOTAL COST	0,00	0,00	0,00	0
SHARE (%)	0,00	0,00	0,00	

4.11.1 Modify budget by Beneficiary

Please select one of the Beneficiaries from the upper table, and then press the Modify budget by Beneficiary button (before you click on any of the Beneficiaries, the function button is inactive). The 'Budget by Beneficiary' sheet opens in a pop-up window, where you can record the planned expenditures by budget lines. The grey fields are filled in automatically by the system, only the white fields are editable. In case of preparation costs relevant for the project, please fill in the white fields in the 'Planned amount' column with the planned expenditures. For those budget lines, where you enter 'Planned amount' the frame of the fields in the 'Description' column turn to red, meaning that these cells are also compulsory to fill in.

No.	Name of the item	Unit	No. of units	Unit price	Amount	%	Description
1	1. Preparation costs				0	0	
1.1	1.1 Technical plans				0	0	
1.2	1.2 Costs of permits				0	0	
1.3	1.3 Purchase of land				0	0	
1.4	1.4 Studies, statistics, databases and researches				0	0	
1.5	1.5 Project meetings and travel costs				0	0	
1.6	1.6 Translation and interpretation costs				0	0	

4.11.2 Budget item - New, Modify and Delete

Except for preparation costs, flat rate type staff and administrative costs, budget data shall be entered as per budget item.

4	Travel and accommodation costs				0,00	0
4.1	Travel cost of project staff				0,00	0

⊞ New   ✎ Modify   🗑 Delete

Please select a budget line (e.g. Travel cost of project staff), then press New. As a result, a pop-up window appears called 'Budget per Beneficiary'.

The following fields are displayed:

- **Role** - the role of the relevant Beneficiary, automatically filled in by the system.
- **Beneficiary abbreviated name** - the abbreviated name of the relevant Beneficiary, automatically filled in by the system.
- **No.** - number of the selected budget line relevant for the budget item, automatically filled in by the system
- **Budget line** – name of the selected budget line relevant for the budget item, automatically filled in by the system.
- **Guide** – in case of some budget headings / lines (e.g. budget line 2.1 and 2.2 and budget heading 3, etc.) there is a short guide on eligibility rules related to the specific budget heading / line. For detailed information, please consult Eligiblity Rules of Expenditure.
- **Budget item No** – a three digit long number (e.g. 4.1.1.) which the item automatically receives from the system when entering the planned amount, also containg reference to the related budget line and budget heading.
- **Name of the item** - please fill in the name of the budget item.
- **Unit** - please fill in the measurement unit of the budget item.
- **No. of units** - please fill in the number of units (maximum 2 decimals are allowed).
- **Unit price** - please indicate the unit price (maximum 2 decimals are allowed).
- **Amount** - the amount is calculated automatically by the system from the number of units and their unit price.
- **Description** – please provide a short description about the content of the planned budget item.

Please always leave this screen by pressing Add in the upper right part of the screen (please see highlighted by red in the below picture) in order to store the information you have provided. If you click on Cancel, you return to the previous screen without saving the data you have entered.

Already entered budget items can be modified by clicking on Modify or deleted - only after confirmation - with the Delete button. The delete process can be interrupted with Cancel. Modify and Delete buttons are inactive until at least one budget item is entered and selected by the Applicant by clicking on it.

4	Travel and accommodation costs		
4.1	Travel cost of project staff		
⊞ New ✎ Modify 🗑 Delete			
4.1.1	Test travel	travels	3

Please enter the complete planned budget per budget items by following the procedure described above.

There are two methods for the calculation of staff cost: real cost and flat rate. Therefore as a first step, you need to select one of those from a drop-down list by clicking on the down arrow in the row of budget heading 2. Staff costs. Consequently, the planned amount of both 2.1 and 2.2 budget lines is calculated according to the selected method.

2	Staff costs		
2.1	Salary of staff - direct project management	**Flat rate**	
2.2	Salary of staff - professional team members	Real cost	

In case you choose real cost, after selecting the relevant budget line, please press New and fill in the datasheet according to the followings:

BUDGET BY BENEFICIARY   ✕

⊞ Add   ⊘ Cancel

CHAPTER 7. BUDGET - PER BENEFICIARY

ROLE   BENEFICIARY ABBREVIATED NAME

Lead Beneficiary   TEST LB

NO.   BUDGET LINE

2.1   Salary of staff - direct project management

GUIDE

If you choose Real costs, please enter the Position of the project team member in the field NAME OF ITEM , enter Months for UNIT, enter Number of months in the field NO.OF UNITS and the Salary of the project team member in the field UNIT PRICE.

BUDGET ITEM NO.   NAME OF THE ITEM !

2.1.1

UNIT !   NO. OF UNITS !   UNIT PRICE !   AMOUNT !

DESCRIPTION !

- **Role** – the role of the relevant Beneficiary, automatically filled in by the system.
- **Beneficiary abbreviated name** – the abbreviated name of the relevant Beneficiary, automatically filled in by the system.
- **No** – number of the selected budget line relevant for the budget item, automatically filled in by the system.
- **Budget line** – name of the selected budget line relevant for the budget item, automatically filled in by the system.
- **Guide** – a short guide on eligibility rules related to the specific budget line. For detailed information, please consult Eligiblity Rules of Expenditure.
- **Budget item No** – a three digit long number (e.g. 2.1.1.) which the item automatically receives from the system when entering the planned amount, also containg reference to the related budget line and budget heading.
- **Name of the item** – please insert the position of the project team member.
- **Unit** – please specify the measurement unit (month).

- **No. of units** – please specify how long the project team member is going to work in the project (number of months).
- **Unit price** – please indicate the monthly salary of the project team member related to the implementation of the project.
- **Amount** – the amount is calculated automatically by the system from the number of units and their unit price.
- **Description** – please provide a description about the role of the team member in the project.

> NOTE!
> Before leaving the current sheet always make sure you have all the mandatory cells filled in.
> Contentwise please consult the respective chapters of the Guidelines for Applicants and Eligibility Rules of Expenditure.

4.12 Sources of funding sheet

The upper table of the Sources of funding sheet is automatically generated by the system and contains the total budget of the Partnership divided by sources of funding.

- **EU contribution** – amount of EU contribution by Beneficiary and on project levell
- **National contribution** – amount of national contribution by Beneficiary and on project level
- **Own contribution** – amount of own contribution by Beneficiary and on project level
- **Total budget** – amount of total budget by Beneficiary and on project level.
- **Amount of advanced EU contribution** – amount of EU contribution paid in advance by Beneficiary and on project level

The lower table of the Sources of funding sheet is empty by default. Here – if relevant – the applicant may indicate the following data by Beneficiary:

- **Planned net revenues**
- **Funding from other sources**

In order to fill in planned net revenues, please select the line **Planned net revenues** – by clicking on the line – then press Modify. Consequently, the 'Sources of funding' datasheet opens, where planned net revenues can be entered by Beneficiary. Please press the Save button before closing the sheet, otherwise the entered data will not be stored.

In order to enterfunding from other sources, please select the relevant line (**Funding from other sources),** then press Modify. Consequently, the 'Sources of funding' datasheet will open, where Funding from other sources can be entered by Beneficiary. Please press the Save button before closing the sheet, otherwise the entered data will not be stored.

NOTE!
Before leaving the current sheet always make sure you have all the mandatory cells filled in.
Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.13 Payment forecast sheet

There are two tables on this sheet: the first is the payment forecast for the total budget of the project, the second is the payment forcast of the EU contribution. After filling in the first table (Beneficiary / Total budget), based on the values recorded here, the EU contribution amounts in the lower table are calculated and filled in automatically by the system.

Please fill in for all Beneficiaries the expected amounts to be paid out in each reporting period. Total values are calculated automatically by the system, while the difference between the 'Total cost' provided in the 'Project budget' sheet and the already entered payment forecast amounts, i.e. the amount still to be planned, are displayed in the 'Difference' column. In case there is a difference between the Total (EUR) planned by Beneficiary in this sheet and between the 'Total Cost' per Beneficiary given in the Project budget sheet, an error message is displayed below the table in red:

'Some Beneficiary total costs differ from that coming from the budget lines!'

BENEFICIARY / TOTAL COST					
BENEFICIARY	REP. PERIOD 1	REP. PERIOD 2	REP. PERIOD 3	TOTAL (EUR)	DIFFERENCE
LB - TEST LB	3 000	0	0	3 000	-12 000
B1 - TEST PARTNER	0	0	0	0	
TOTAL COSTS	3 000	0	0	3 000	-12 000

Some beneficiary total costs differ from that coming from the budget lines!

BENEFICIARY / EU CONTRIBUTION					
BENEFICIARY	REP. PERIOD 1	REP. PERIOD 2	REP. PERIOD 3	TOTAL (EUR)	DIFFERENCE
LB - TEST LB	2 550	0	0	2 550	-10 200
B1 - TEST PARTNER	0	0	0	0	
TOTAL COSTS	2 550	0	0	2 550	-10 200

NOTE!
Before leaving the current sheet always make sure you have all the mandatory cells filled in.
Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.14 Project team sheet

This sheet serves you to view, fill in and modify the indicative time spent by the project team members working on the project. In case the applicant selected real cost settlement for the reimbursement of its Staff costs on the Project budget sheet, the information inserted for lines 2.1. Salary of staff – direct project management and 2.2. Salary of staff – professional team members is displayed here. Otherwise, the result list of the screen is empty.

In order to fill in the name of the staff member and the indicative time spent working on the project, please click on the item related to the respective Beneficiary, then press Modify.(Before selecting an item on the list, all function buttons – View, Modify – are inactive). Subsequently, the Project member datasheet opens, where the 'Name of team member' and 'Est. share of working time in %' fields can be filled in. Please press Save before closing the sheet, otherwise the entered data will not be stored. The following fields are displayed on the 'Project member' datasheet:

- **NO** – number of the project team member, automatically filled in by the system.
- **Beneficiary abbrev. name** - abbreviated name of the Beneficiary, provided by the system.
- **Budget Line** – respective budget line on which the cost of the team member was entered, provided by the system.
- **Position** - as defined on the Project budget sheet in the Name of the item field, automatically filled in by the system.
- **Name of team member** - Please fill in the name of the project staff member.
- **Est. share of working time in %** - Please fill in the estimated share of working time spent on the project by the respective project staff member in percentage.
- **Months in project** - number of months worked in the project *as defined on the Project budget sheet in the No. of units* field, automatically filled in by the system.
- **Monthly salary in project** - planned gross monthly salary of the staff member *as defined on the Project budget sheet in the Unit price* field, automatically filled in by the system.
- **Total -** planned total gross salary of the staff member *as defined on the Project budget sheet in the Amount field*, automatically filled in by the system.
- **Job Description** - as defined on the Project budget sheet in the Description field, automatically filled in by the system.

NOTE!
Before leaving the current sheet always make sure you have all the mandatory cells filled in. Contentwise please consult the respective chapters of the Guidelines for Applicants.

4.15 Infrastructure and works sheet

On this sheet infrastructure and works related information can be entered in two tables ('Location of insfrastructure and works' and 'Permist') such as location of the works, status of the real estate and eventual permits requiredBoth tables are empty by default, however following the upload of data, all locations and permits aree listed. The following function buttons are available, which – except for New – are inactive until the list is empty, or the Applicant selects an item in the list by clicking on it:

- **New** - adds new location / permit.
- **Modify** - modifies already entered location / permit.
- **Delete** - deletes already entered location / permit.
- **View** - opens already entered location / permit.

Please start to fill in by inserting the location. In order to do so, please press the New button in the 'Location of infrastructure and works' section, which opens the 'Location of infrastructure and works' datasheet containing the following fields:

- **Beneficiary name** - please select the name of the relevant Beneficiary from the drop-down list.
- **Role** - Role in the project (filled in automatically by the system)
- **Permit required** - please select from the drop-down list accordingly if required or not.
- **All related topographical (lot) numbers** - please enter all topographical (lot) numbers involved in the investment.

- **Status of the real estate(s) concerned** - Please select the relevant status from the drop-down list.
- **Description** - please describe the ownership/rental situation or rights of use of the real estate, relevant provisions taken (e.g. signed sale and purchase contract, necessity of expropriation, if yes, the stage of the process).

After all data are filled in, click on the Save button in order to store the entered data. The fill-in process can be interrupted at any time with the Cancel button, in which case data are not saved and the user can return to the previous sheet. Please upload all locations accordingly.

Items can be opened in read-only mode by selecting the respective item in the result list of the 'Location of infrastructure and works' section, and clicking on the View button. Items can be modified by selecting the respective item from the list, and clicking on the Modify button. Deleting a location can be performed similarly by pressing on Delete, following a confirmation question.

In case the applicant indicated investment works implying a permit (see above 'Permit required' field), it is compulsory to enter information regarding the permits . Please press the New button above the 'Permits' section. Subsequently, the 'Permit' datasheet opens with the following fields:

- **Beneficiary Name** - please select the name of the relevant Beneficiary.
- **Role** - Role in the project (filled in automatically by system).
- **Type of permit** - please select from the drop-down list accordingly.
- **Identification / Registry number of permit** - please fill in the unique identification number of the permit.
- **Date of request** - please fill in the date of request of the permit.
- **Date of receipt** - please fill in the (expected) date of receipt of the permit.
- **Description** - please describe the content of the permit, i.e. the planned works, the size of the investment and provide information about the status of the necessary permits (e.g. what steps need to be taken to receive the permit, etc.).

After having filled in correctly all necessary fields, please press the Save button in order to store the information you have entered. Completion can be interrupted with the Cancel button; in this case the Application will return to the previous screen without saving the entered information. Please proceed with the completion similarly for all relevant permits.

Items can be viewed in read-only mode by selecting the respective item in the result list of the Permits section, and clicking on the View button. Items can be modified by selecting the respective item in the list, and clicking on the Modify button. Deleting a permit can be performed similarly, by pressing the the Delete button, following a confirmation question.

4.16 Documents sheet

This sheet contains the list of documents to be submitted along with the Application Form, and allows for the applicants to upload files to their Application. The table on the sheet contains two items by default (the two mandatory annexes of the Application Form), and all function buttons, except for the New are inactive until the Applicant selects an item on the list by clicking on it. The available function buttons for handling documents are:

- **New** – enables the user to add a new item to the list of documents and after having saved it to upload a new document.
- **Modify** - modifies existing document.
- **Delete** - deletes a previously uploaded document.
- **View** - opens a previously uploaded document in read-only mode.

4.16.1 File upload

In order to upload a file in one of the already existing elements of the list, please select an item (which is a documentum folder in this case) from the list, then press Modify. Subsequently, the 'Main data sheet' of the 'Document datasheet' opens by default.

All displayed fields related to the document data are read-only:

- **Folder** - the system stores the document in the folder indicated by the access path displayed here.
- **Method of submission** - he method of submission is indicated here.
- **Document ID** - generated by the system.
- **Date of preparation** - date of preparation of the document.
- **Type** - type of the document.
- **Subject** - Subject of the document.
- **Prepared by (user id)** - user ID of the user who prepared the document.
- **Prepared by (user name)** - user name of the user who prepared the document.
- **Channel** - channel of submission.
- **Mandatory** - indicates if uploadingthe document is mandatory to the respective folder.
- **Description** - description of the document.
- **Language of the Document** – language of the document.
- **To be Submitted in original or copy** - indicates if the document needs to be submitted in original or in copy.

Continue by clicking on the 'Files' sheet.

In the upper section of the sheet there is a search section with the following fields:

- **File name (id)** - unique ID of the file.
- **Type** - format of the file.
- **Original file name** - name of the file.
- **Sequence number** - Sequence number of the file.

The handling of files can be carried out in the lower section of the 'Files' sheet based on the following options:

- **Upload** - uploading a file.
- **Delete** - deleting a previously updated file.
- **Reorder** - reordering the previously updated files.
- **Download** - downloading a file.

The list of files is empty by default and all function buttons, except for Upload are inactive until the list is empty, or the Applicant selects an item in the list by clicking on it.
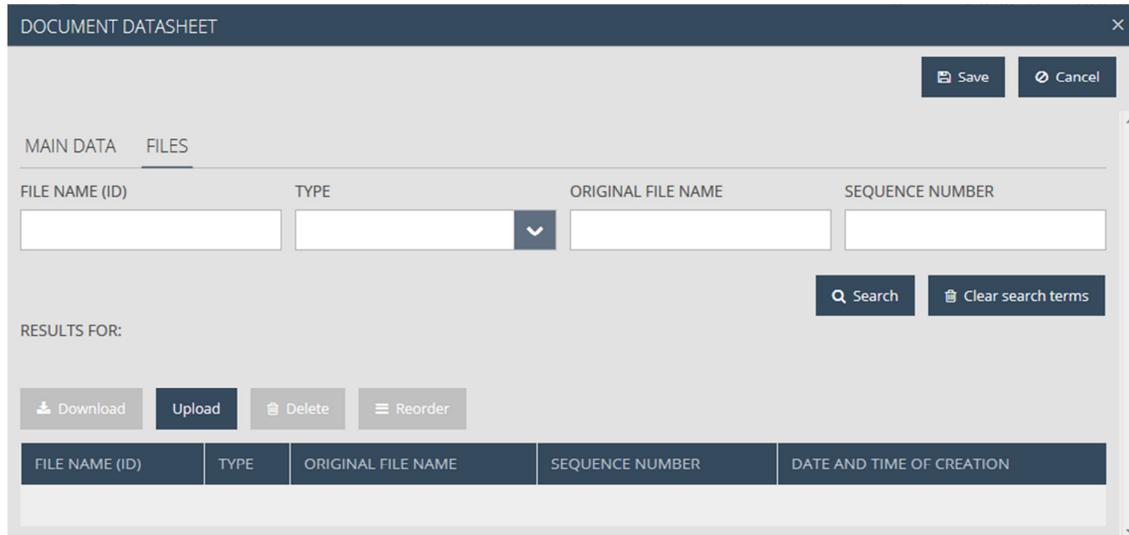
Please select Upload. As a result, the 'File upload' pop-up window opens where you can search and select the respective file on your computer. Upon pressing Open, the upload is carried out.
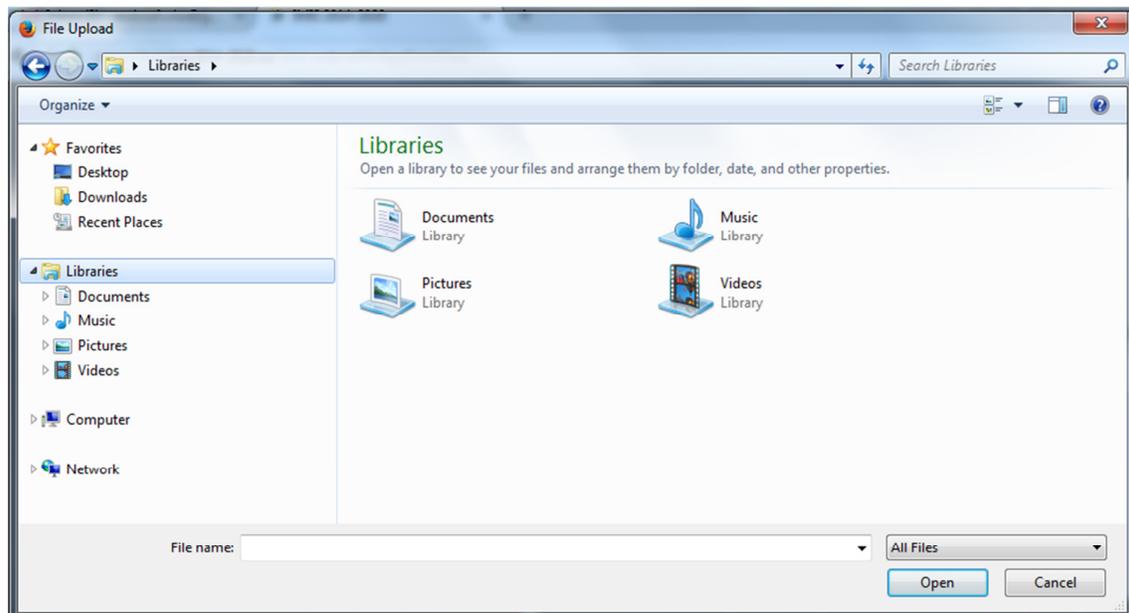
The selected and uploaded file appears under the respective document.

4.16.2 New document

In case you wish to add a new document to the available folder system, please press New. Subsequently, the 'Document datasheet' opens with the 'Main data' sheet.

The following fields are displayed:

- **Folder** - the system will store the document in the folder indicated by the access path displayed here.
- **Method of submission** – please select the method of submission fro mthe drop-down list.
- **Document ID** – ID generated by the system automatically.
- **Date of preparation** – date of preparation of the document.
- **Type** – type of the document.
- **Subject** – Subject of the document
- **Prepared by (user id)** – user ID of the user who prepared the document.
- **Prepared by (user name)** – user name of the user who prepared the document.

After completing all fields correctly on the 'Document datasheet' please press Save in order to store the information you have entered Consequently, the Files sheet is displayed, where you can initiate a file upload in line with the method described in the previous chapter.

4.17 Saving your Application

You can interrupt filling in your Application at any moment and save the changes made by clicking on the Save button located in the upper right corner of the screen. Your Application is saved this way and appears in the Application search result list. From here, upon selection, you can open it for modification and you can continue your work on the last saved version.

5 How to view, modify or delete an Application?

5.1 Viewing an Application

After saving your Application, please click on the Search menu item of the 'Application section' to open the Application search. The 'Application search' datasheet will display by default all Applications youpreviously started to create. In order to view one of these, please select the respective item in the list by clicking on it and press the View button located at the top of the list.

As a result, the screen used at the creation of the Application opens; however, all data displayed are read-only. You can close the 'View' mode by selecting one of the items in the Menu bar or by clicking on the page header.

5.2   Modifying an Application

After saving your Application, please click on the Search menu of the Application section on the sidebar to open the Application search. The 'Application search' datasheet displays by default all Applications you previously started to create. In order to modify one of these, please select the respective item in the list by clicking on it and press the Modify button located at the top of the list.

As a result, the screen used during the creation of the Application opens, where all data can be edited. Modifications can be saved in line with the steps described in Chapter 4.17. Modification can be interrupted without saving by selecting one of the items in the Menu bar or by clicking on the page header.

Please note that modifications to Applications are only allowed as long as the status of the Application is either 'Under preparation' or 'Need amendment'. In all other cases the Modify button is inactive, since modifications to the submitted Application are not possible.


If during the formal and quality assessment of your Application a need for completion or clarification should arise, the Application will be sent back for completion to you, along with an e-mail notification. In this case the status of the Application will be set to 'Need amendment', thus it can be edited and resubmitted (as described in Chapter 7).

5.3   Deleting an Application

After saving your Application, please click on the Search menu item of the Application section on the sidebar to open the Application search. The 'Application search' datasheet displays by default all Applications you previously started to create. In order to delete one of these, please select the respective item in the list by clicking on it and press the Drop button located at the top of the result list.
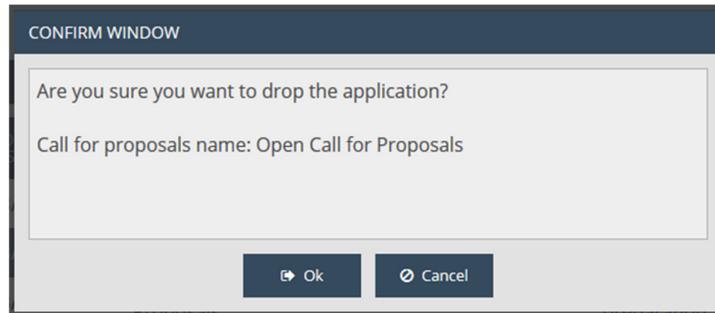
Consequently, a confirmation window appears, where you have to confirm dropping the Application. The process can be interrupted by clicking on Cancel. In case the user selects the OK button, the Application is deleted, but it remains available on the list of Application for read-only mode (View) and the entered data can be downloaded in pdf (Generate Application Form).
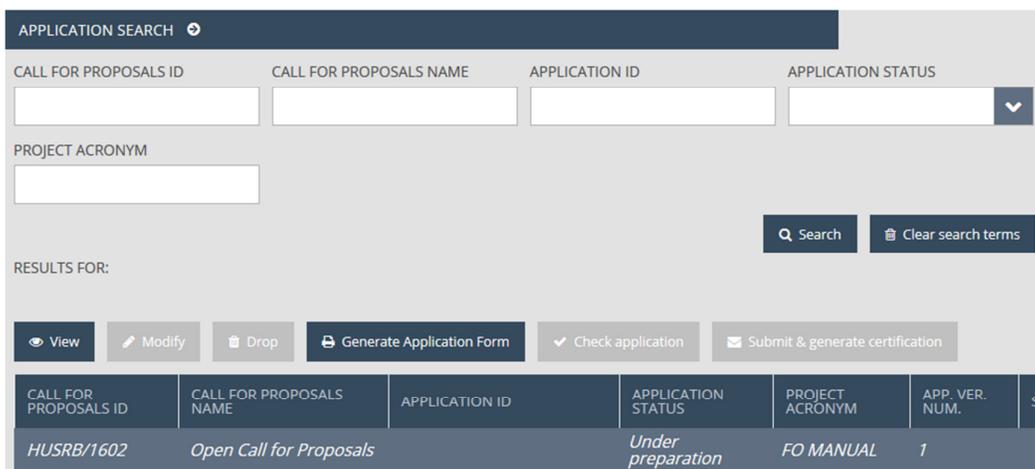
Please note that Applications can only be dropped as long as their status is 'Under preparation'. In all other statuses (e.g. 'Submitted') the Drop button is inactive, also meaning that deleting the Application is not possible.

In case an Application has been dropped, there is no possibility to cancel the dropping. Therefore, you are advised to carefully consider before pressing OK in the confirmation window.

6   How to generate the Application Form?

After saving your Application, please click on the Search menu item of the Application section on the sidebar to open the Application search. The 'Application search' datasheet displays by default all Applications you previously started to create. Please select the Application for which you would like to generate the Application Form, then click on the Generate Application Form button located at the top of the list.

As a result, a download window opens, where the user can decide whether to open or save the generated form (in PDF).

This function is available all through the Application creation process, even if there are incomplete fields.
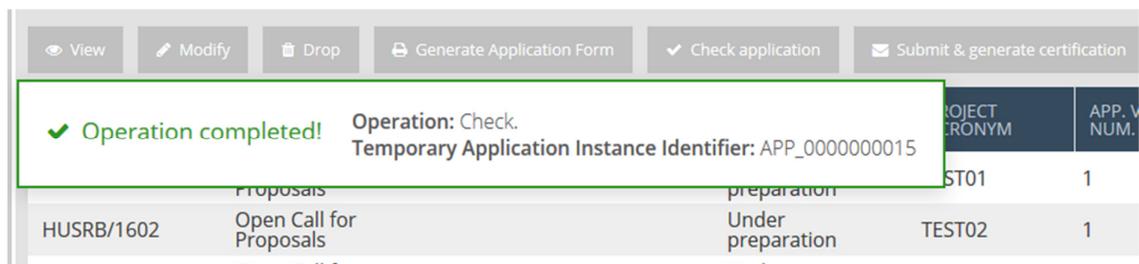
7   How to submit the Application?

After completing and saving your Application (see chapter 4.17), please click on the Search menu item of the Application section on the sidebar to open the Application search. The 'Application search' datasheet displays by default all Applications you previously started to create in the search result list. Please select the Application you would like to submit, then click on the Check application button located at the top of the result list. Consequently, the system will carry out an automatic check with the following outcomes:

- **Check failed** – in case the automatic check identified errors in the prepared Application, the applicant is informed in a pop-up window about these errors in an easy-to-find way. The list of errors can be opened or downloaded in .docx format by clicking on the Download the error list button. The pop-up window can be closed by pressing Cancel, thus the Application can be modified. Correcting the indicated errors is a pre-requisite of the successful submission.
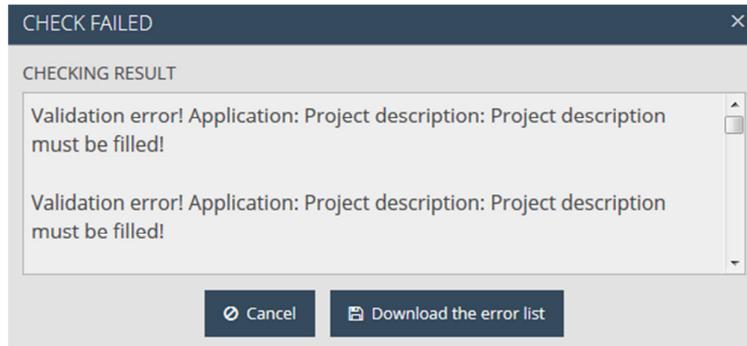
- **Check successful** – in case the automatic check did not identify any errors in the prepared Application, a pop-up window opens where the system notifies the user about the successful check.

The Check application function is available all through the Application creation process, even if there are incomplete fields.

In order to submit the Application, please click on the Search menu of the Application section on the sidebar, select the relevant Application, then press Submit & generate certification. Since a successful check is a pre-condition for submission, in case the Submit & generate certification button is inactive (which is possible even after a successful check, in case later on you modify your Application), please carry out a check by clicking on the Check application button.

After pressing Submit & generate certification, a pop-up window opens asking for confirmation. By pressing OK, the Application is submitted, by pressing Cancel, you return the Application Search sheet without submitting your Application.
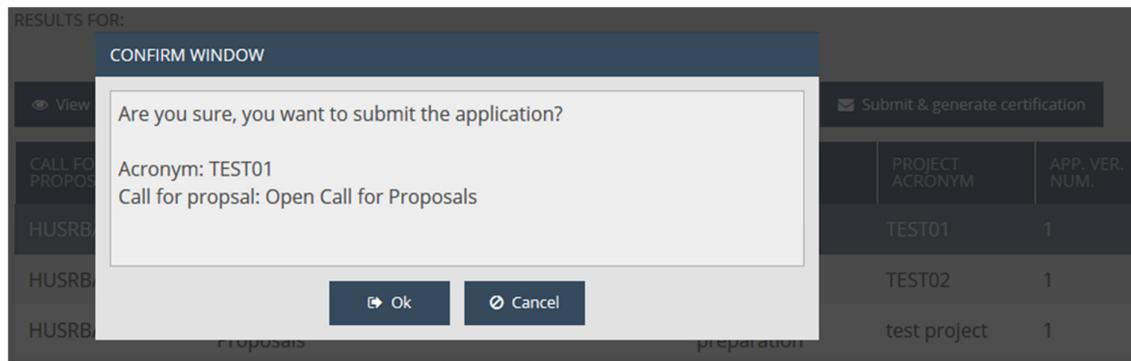
After confirmation, the applicant is notified about the successful submission in a pop-up window.

The status of the Application in the Application search result list changes to Submitted and the system generates the Certification and the Application Form and saves them in the Documents sheet.

Please download the Certification, print it and have it stamped and signed by the legal representative(s) of each and all Beneficiaries! In order to download the Certification, go to Documents sheet, click on Certification and press View. Consequently, the Document datasheet pop-up window opens. Click on 'Files' in the upper left corner, select the Certification on the result list by clicking on it, and then press Download. The Dowloand button is inactive until the Applicant selects an item on the list.

The Application cannot be changed or modified after the submission. However,the View function remains active and the applicant can access and download the submitted Application and uploaded documents. In case you would like to download the finalized Application Form in pdf format, please follow the above-described steps of downloading Certification, and choose Application Form from the list of the Documents sheet.