Interreg - IPA CBC
Hungary - Serbia

IMIS 2014-2020
Project Report Manual

for
the Lead Beneficiaries of the
Interreg-IPA CBC Programme Hungary-Serbia

The Programme is co-financed by the European Union

Good neighbours
creating
common future

Table of content

1 Using this Manual

The main aim of this User Manual is to provide guidance to Lead Beneficiaries of the Interreg-IPA Cross-border Cooperation Programme Hungary-Serbia on the use of the IMIS 2014–2020 Monitoring and Information System. Lead beneficiaries need to submit the Project Report that summarises all the Beneficiary reports and describes the progress of the entire project. The result of the reporting process will be a Project Report document and the Application for Reimbursement (PR&AfR).

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 (please 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 in 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

Computers running IMIS 2014–2020 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

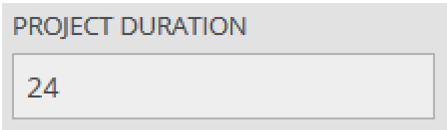
- IMIS 2014–2020 is a web application; thus, any problem with the Internet connection may disrupt communication between the server and the client computer. If this happens, the screen goes grey and the following message is displayed: „Server connection lost, trying to reconnect…”. The session can be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

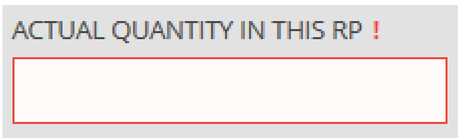
The system uses several types of fields, which may have particular characteristics and require different usage.

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

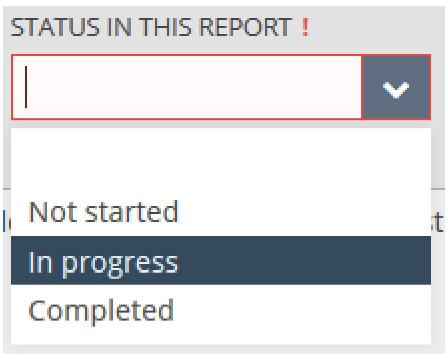


- Fields with a white background – normal entry fields.

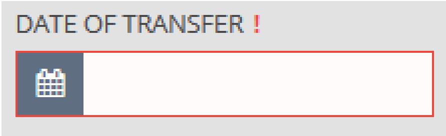
- Fields with a white background and a red border – similar to normal entry fields, except these are mandatory fields. Fields that the user entered unexpected content into are also marked with a red border. In such cases, the validation message is displayed in a tooltip if the mouse is placed over the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



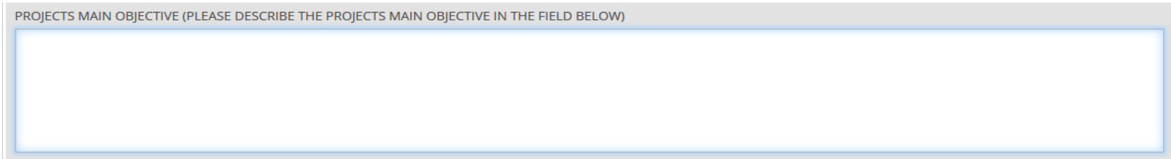
- Drop-down fields – these fields can be filled in using a predetermined set of values. Click on the arrow to open the drop-down list, and click on the chosen value.



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



- Datasheets that open when clicking on a field – fields that need to be filled in using a new datasheet; when mouse is moved over the field, their borders turn blue, and when clicked, a datasheet pops up.



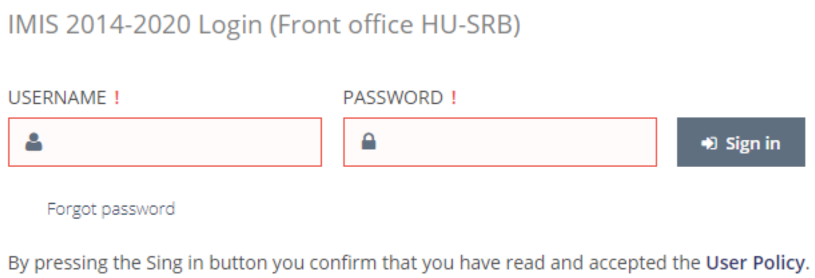
3 How to Access IMIS 2014–2020

- Use the link IMIS 2014-2020 HUSRB PR&AfR to access IMIS 2014–2020
- The browser supported by the system is Mozilla Firefox.
- Working on the same progress 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.

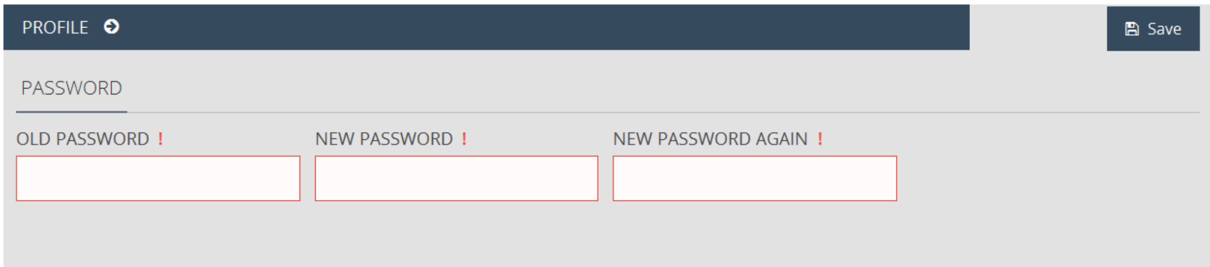
3.1 Logging In

- 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.



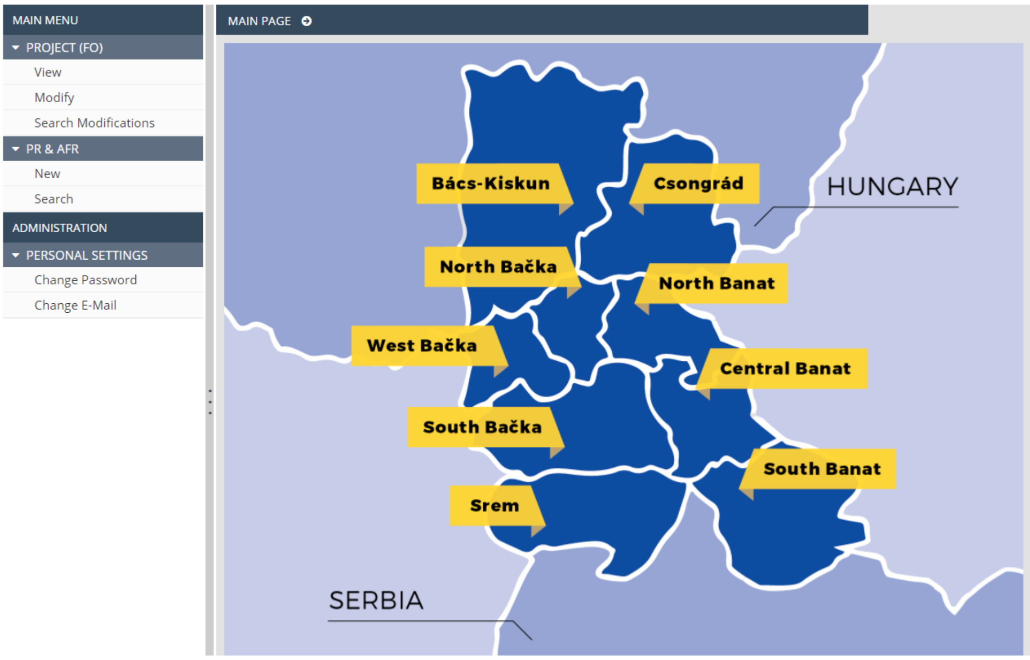
- Finally, log in through the IMIS 2014–2020 login screen using the user name sent via e-mail and the newly received temporary password. Click on "Sign in". By logging in, you automatically accept the Terms and Conditions.
- Attention: the password has limited validity; you need to log in within two 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.

- 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.



3.2 The Menu

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



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

- **Project (FO)** – through this menu item, you can view the current status of the project and your previously submitted modification requests, and you can also initiate the reporting of new changes.
  - **View** – view your project.
  - **Modify** – initiate the reporting of changes in your project.
  - **Search modifications** – continue previously started but not yet submitted modification requests, and view previously submitted change reports.
- **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.

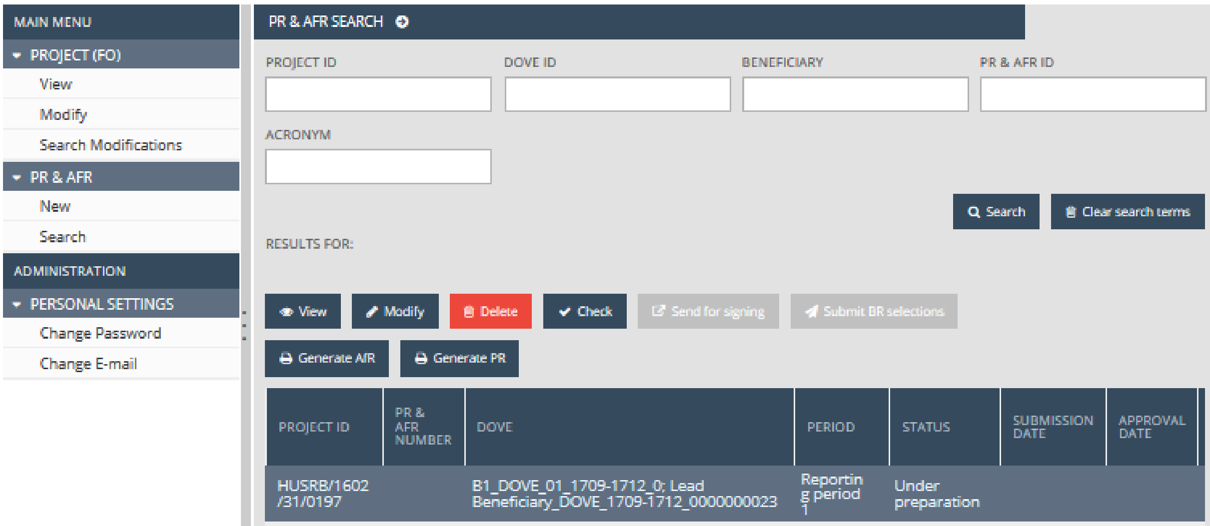
4 Project Report & Application for Reimbursement (PR&AfR)

Lead beneficiaries can submit their project-level reports (PR&AfR) through the system.

No new reports may be submitted for approval until the decision was made regarding the previously submitted reports.

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 list and click MODIFY.



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 Technical Declaration on Validation of Expenditure (TDOVE) is created.

The Lead Beneficiary is responsible for selecting the DOVEs, and the chosen DOVEs/TDOVEs 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.

A project-level report and payment request covering a given period may only be submitted if all beneficiaries participating in the project have obtained a declaration on validation (a DOVE or TDOVE) for the period in question.

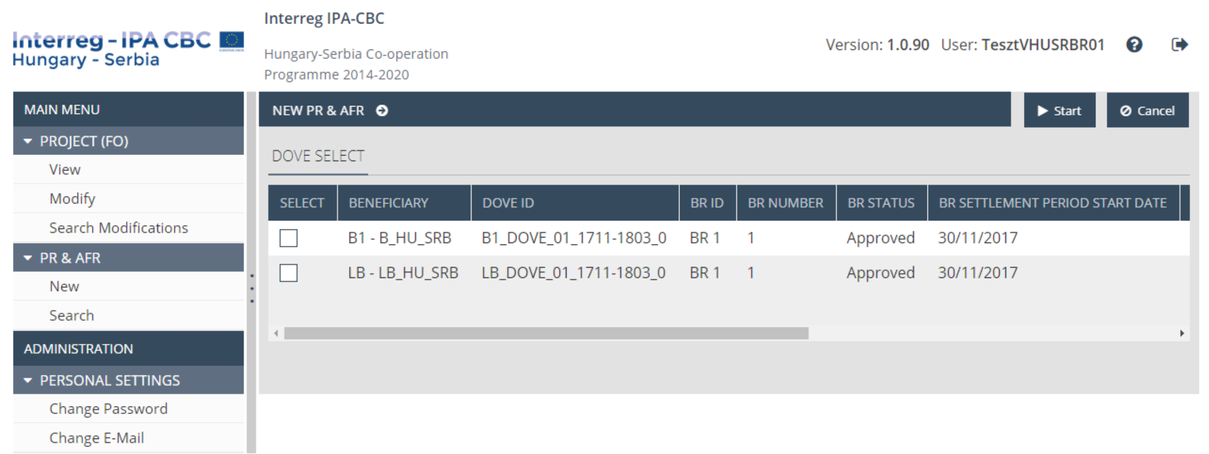
The results of the reporting process will be:

- **Project Report document** – the descriptive and financial part.
- **Application for Reimbursement** – the summary of the expenditures of the beneficiaries in the reporting period.

IMPORTANT NOTE: If you have already previously worked in this interface, please always start with the PR&AfR/SEARCH function to see if you already have reports under preparation.

4.1 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/TDOVEs they wish to base the PR&AfR on.



The PR&AfR has to contain the BR of every beneficiary for the relevant period.

The interface only lists the DOVEs/TDOVEs that:

- have not yet been selected for a PR&AfR that is in “under preparation” state, or
- for a PR&AfR that has been approved/is under approval.

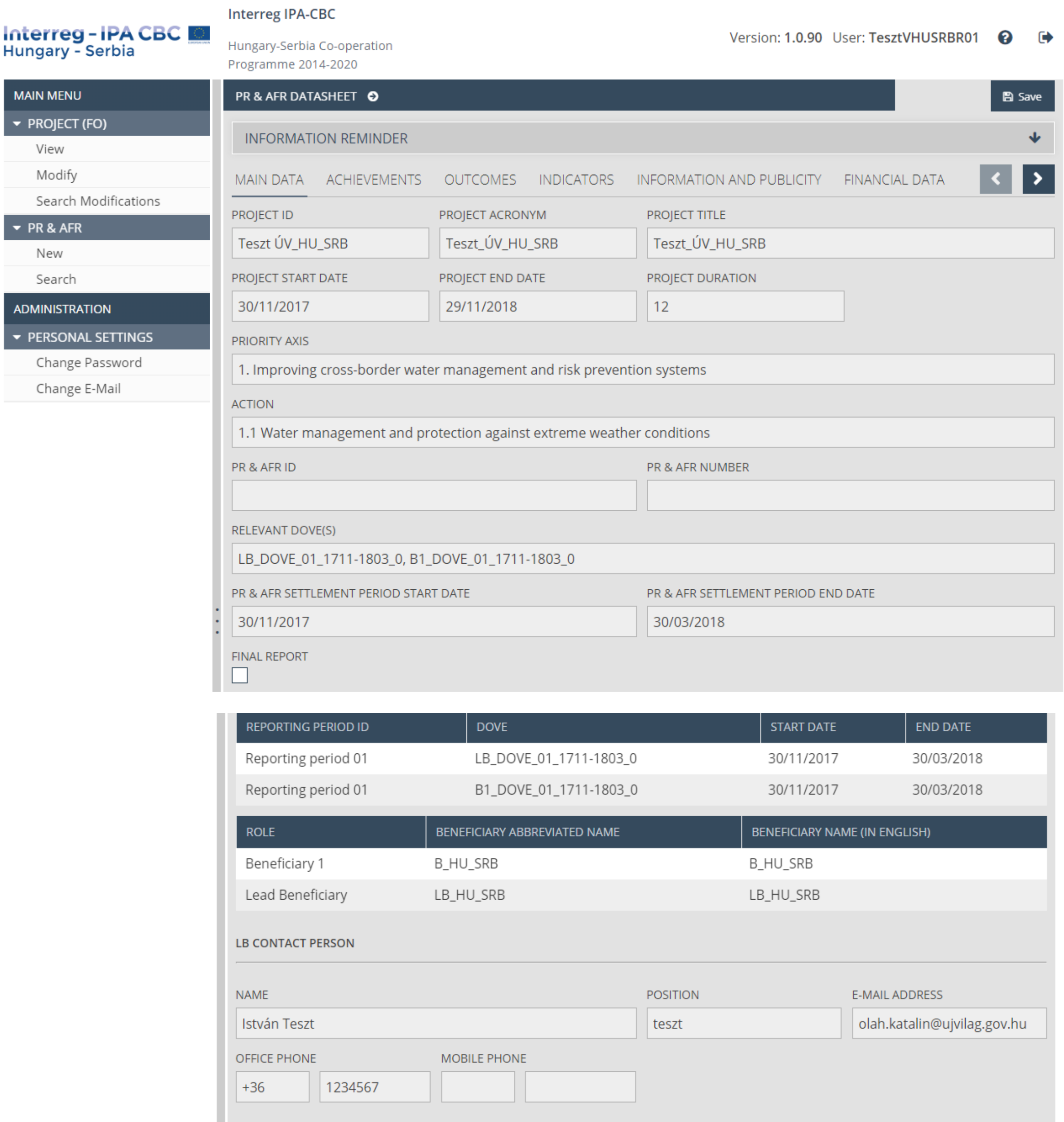
When compiling a project-level report, please use the checkbox in the first column to select the beneficiary reports.

The following buttons are shown:

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

4.2 Main Data Tab

This tab displays the primary information available on the Project Report.



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
- **Priority axis** – the project's priority; filled out automatically
- **Action** – the project's action area; 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

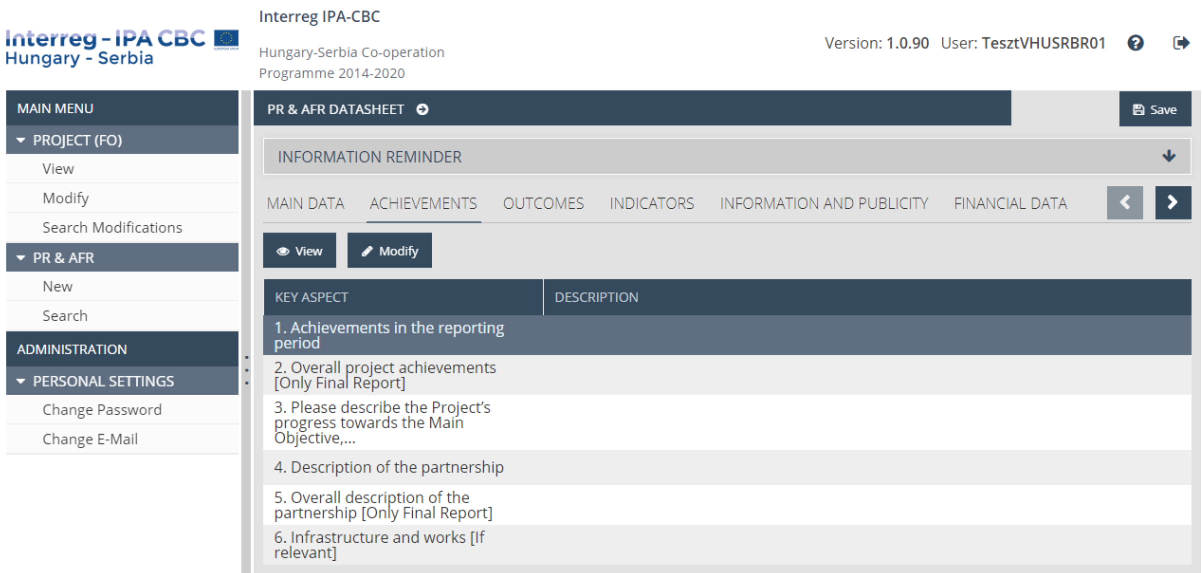
In the lower part of the Main Tab a table is shown listing the selected beneficiary reports and the relevant beneficiaries.

At the bottom of the Main Tab, 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

4.3 Achievements Tab

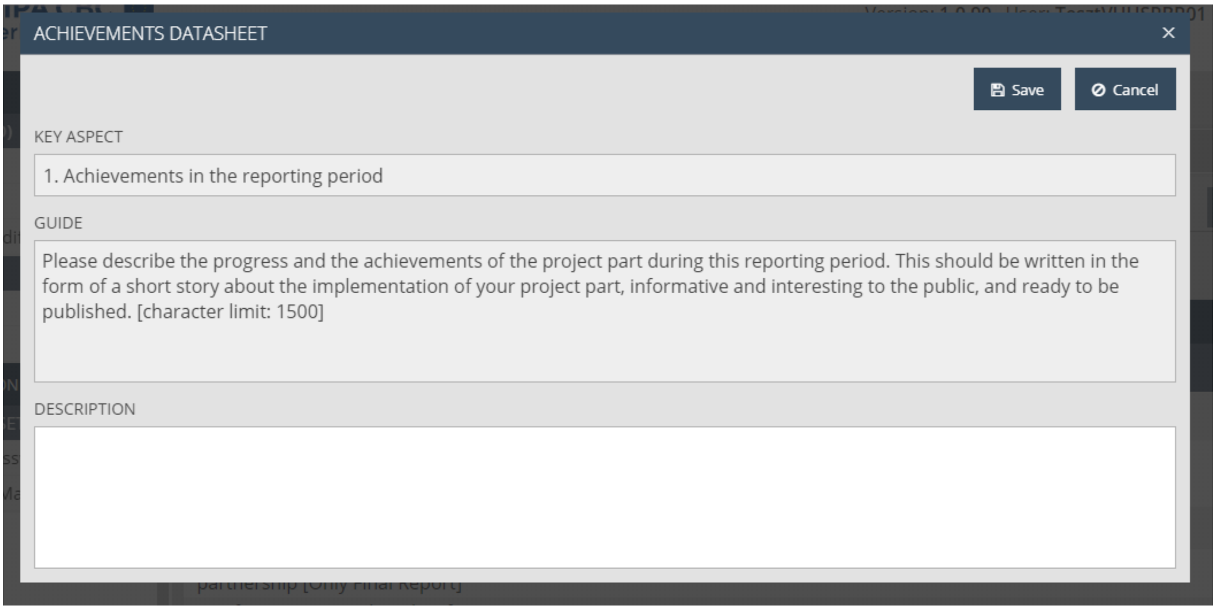
This tab allows you to answer general questions regarding the project's technical progress in the period in question.



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

4.3.1 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.



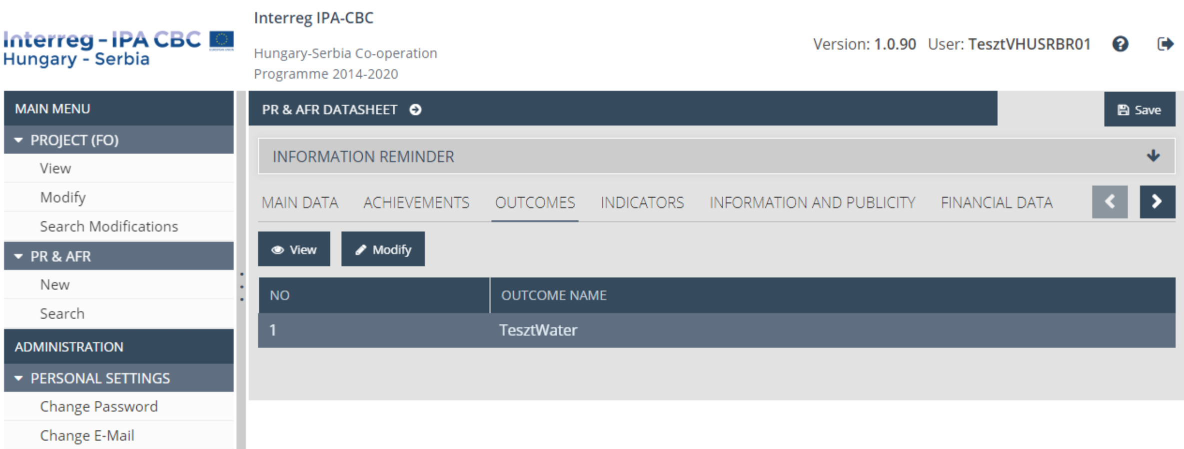
The following fields are shown:

- **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.

4.4 Outcomes Tab

This tab lists all the outcomes that the Lead Beneficiary committed to achieving, allowing the project-level progress achieved in the period in question to be reported.

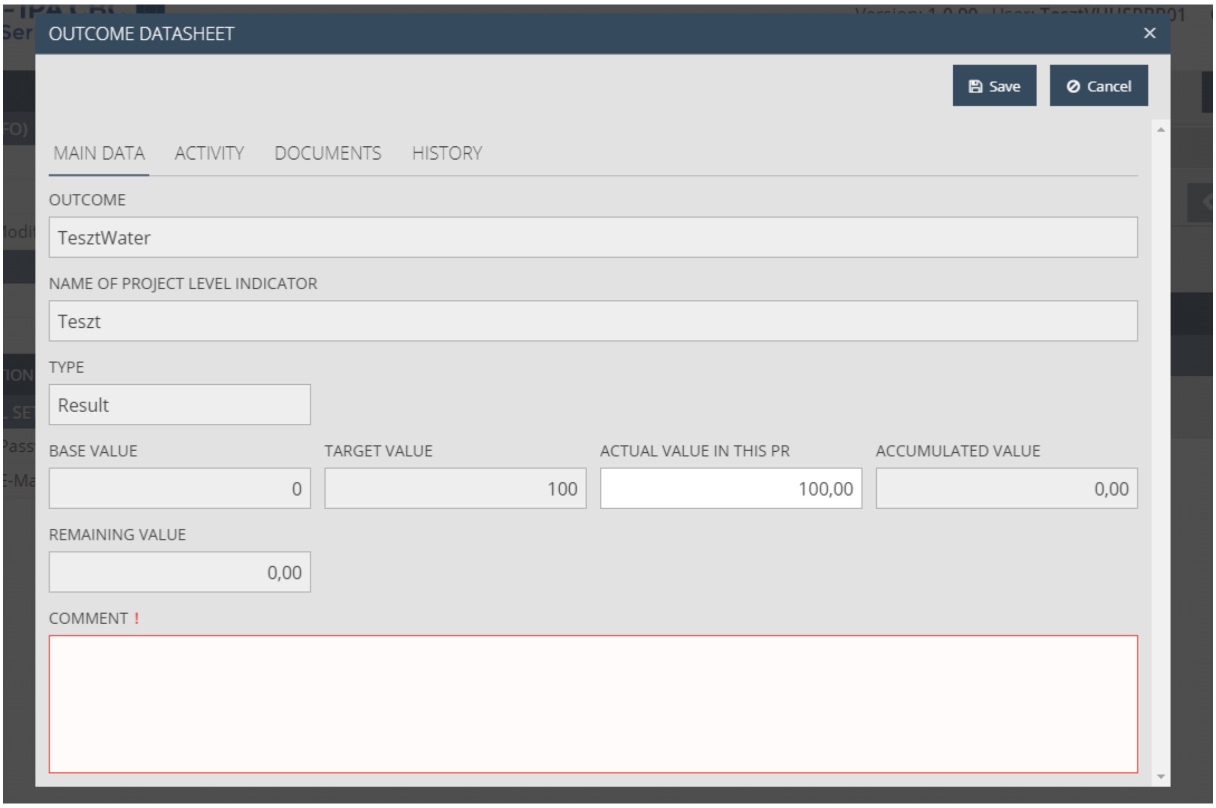


To provide information on a given outcome, select it, then click on **Modify**. In order to view the data on an outcome, click on **View**.

4.4.1 Modifying Outcomes

4.4.1.1 Main Data Tab

The Outcome datasheet shows the key information on the outcome.



The following fields are shown:

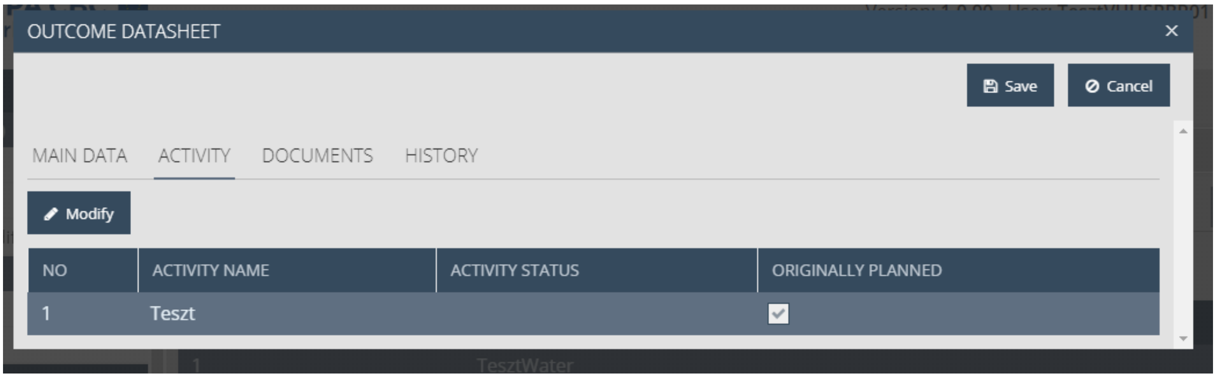
- **Outcome** – name of the outcome; filled out automatically
- **Name of project level indicator** – name of the project-level indicator associated with the outcome; filled out automatically
- **Type** – type of indicator associated with the outcome; filled out automatically
- **Base value** – the indicator's starting value; filled out automatically
- **Target value** – the indicator's value that needs to be achieved; filled out automatically
- **Actual value in this PR** – please enter the outcome achieved in the period in question; that is, the change compared to the previous period. This field is pre-filled based on the values reported by the project's beneficiaries. If the values do not match, please modify them and describe the reason for the modification in the Comment field
- **Accumulated value** – filled out automatically based on the previously accepted values
- **Remaining value** – filled out automatically based on the commitments and the previously accepted values
- **Comment** – please enter other information related to the outcome

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

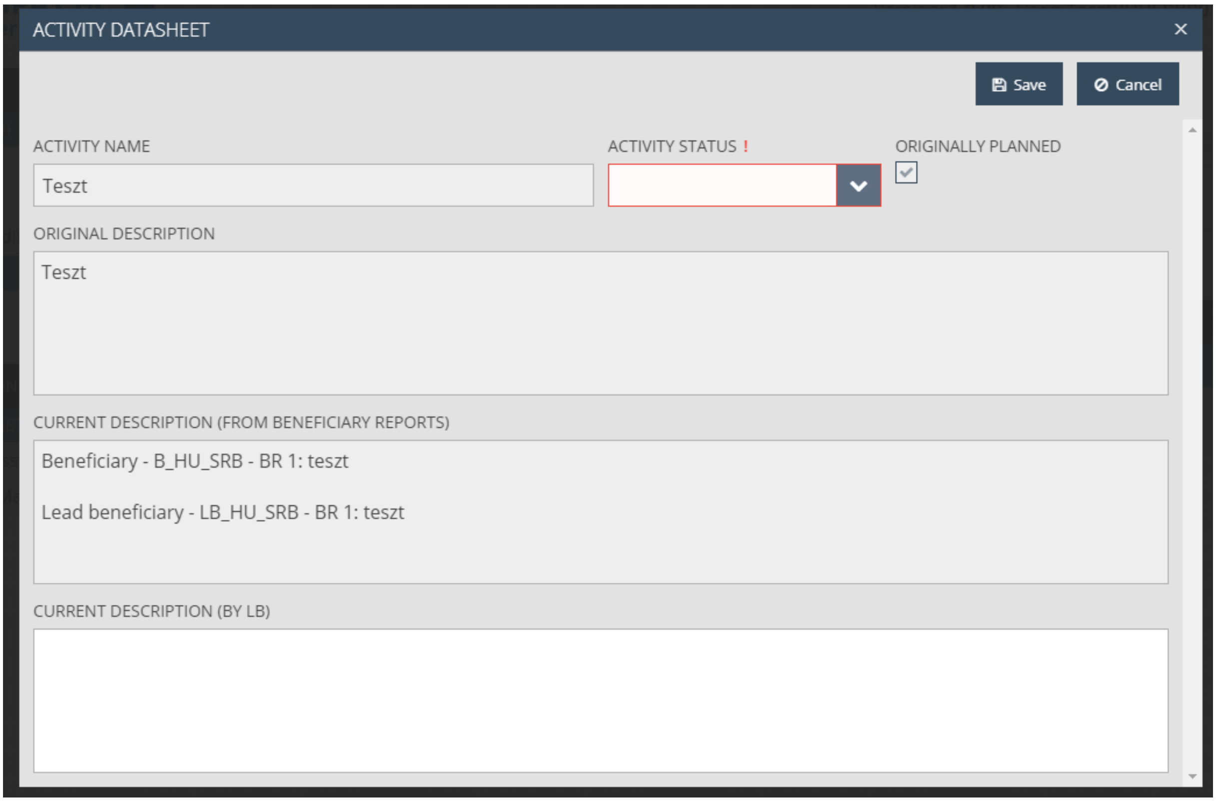
4.4.1.2 Activity Tab

In the table on the activities associated with the outcome, the activities relevant for the outcome in question are displayed. The current status and progress of these activities can be specified.

In order to enter the progress achieved in the period in question with regard to the activity undertaken, please select the activity and click on **Modify**.



4.4.1.3 Modifying an Activity



The following fields are shown:

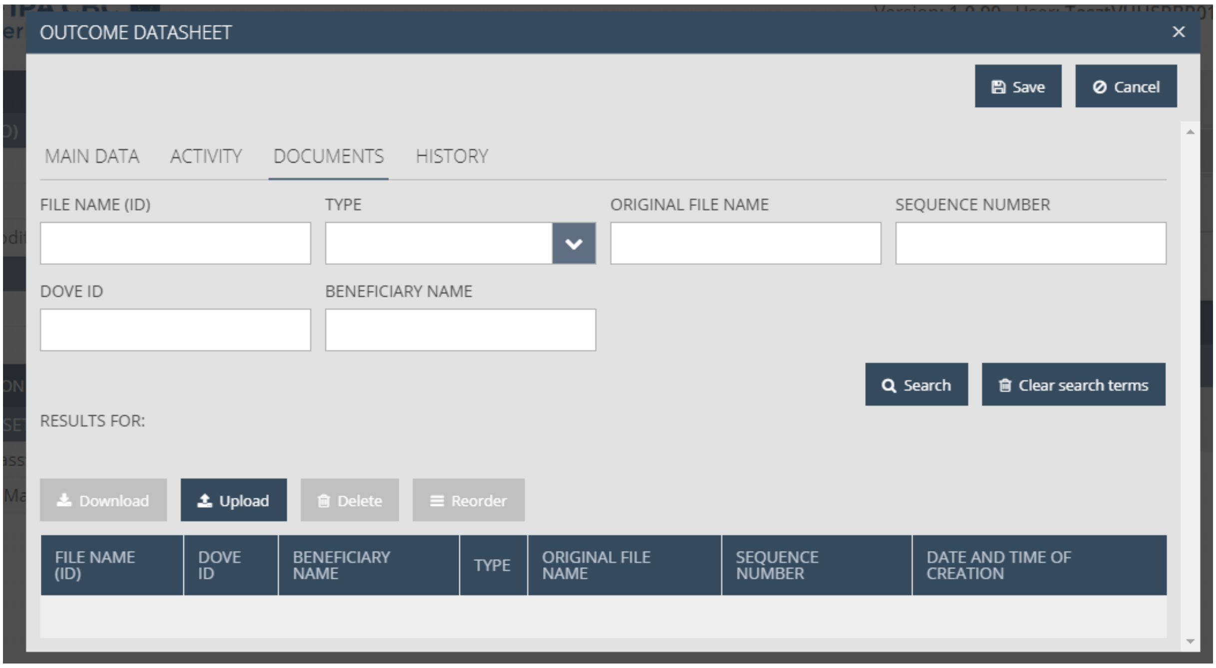
- **Activity name** – the name of the activity; filled out automatically
- **Activity status** – select the status of the activity appropriate for the period in question
- **Originally planned** – was reporting on the activity planned for the reporting period – checked automatically
- **Original description** – the original description of the activity, loaded automatically from the project

- **Current description (From beneficiary reports)** – this field shows all the descriptions provided by the beneficiaries regarding the activity in question for the period in question
- **Current description (By LB)** – please enter the description of the activity in question for the period in question

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

4.4.2 Documents

This tab allows you to submit and view the documents proving the progress of the outcome, the associated project-level indicator and the activity or activities.



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
- **DOVE ID** – identifier of the DOVE in question
- **Beneficiary name** – name of the beneficiary in question

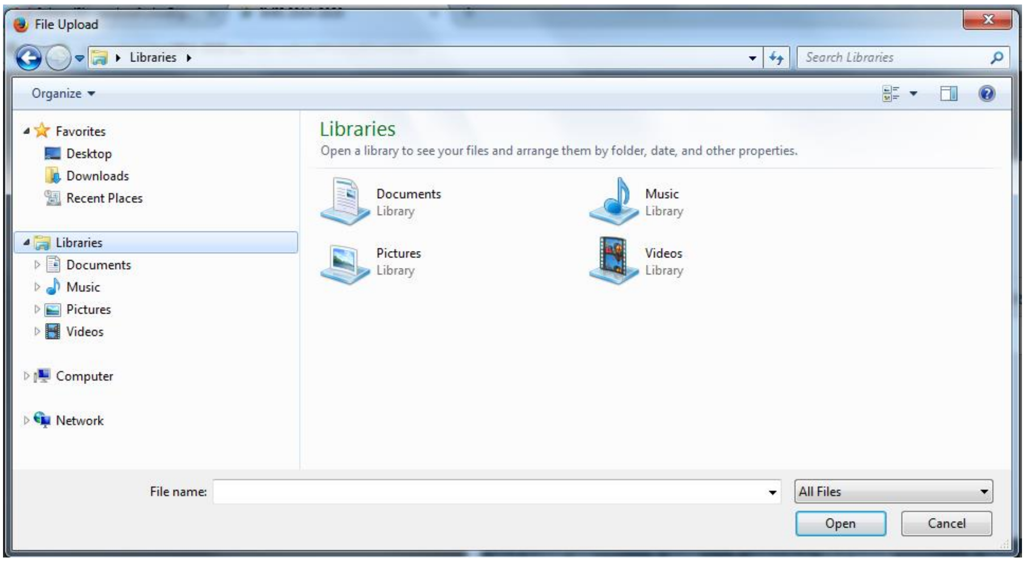
The bottom part of the window offers the following file management options:

- **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.

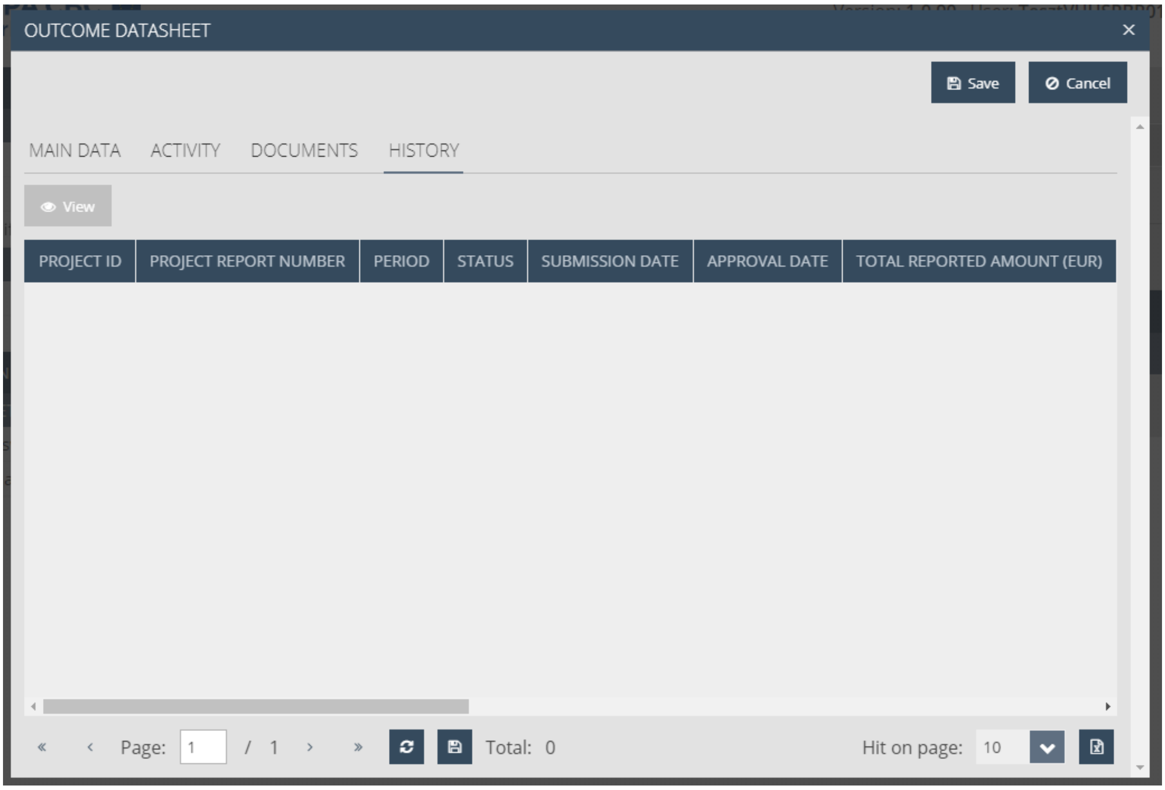
It is important to note that compressed (.zip) files can also be uploaded here.



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

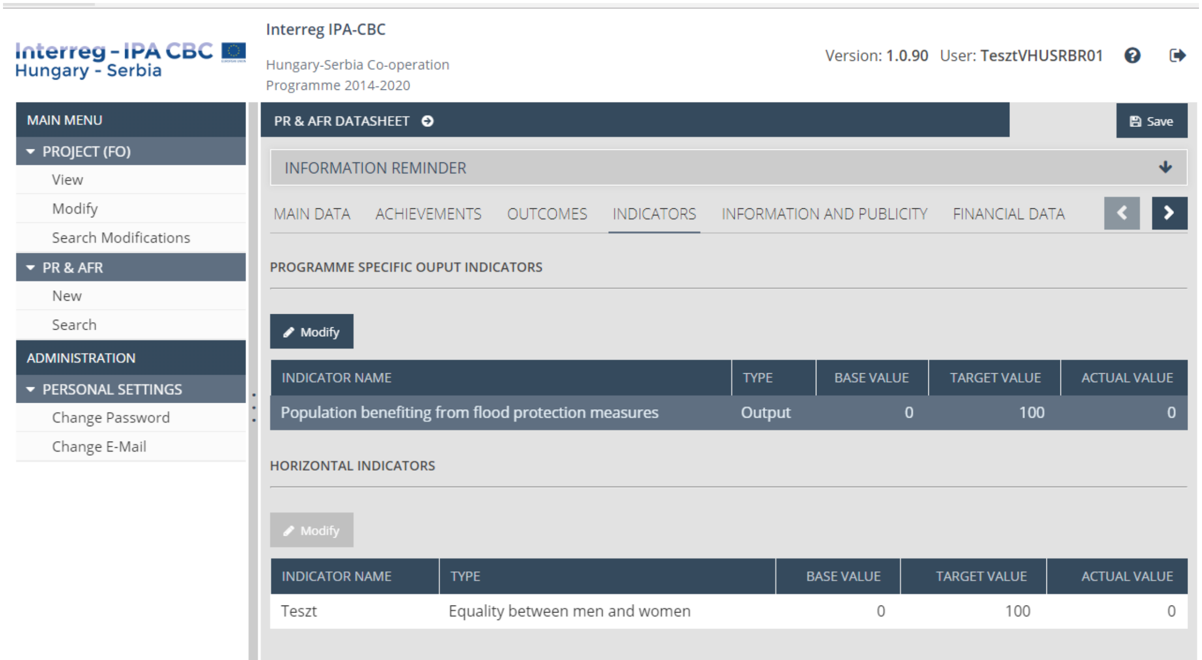
4.4.2.1 Viewing the History

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



4.5 Indicators Tab

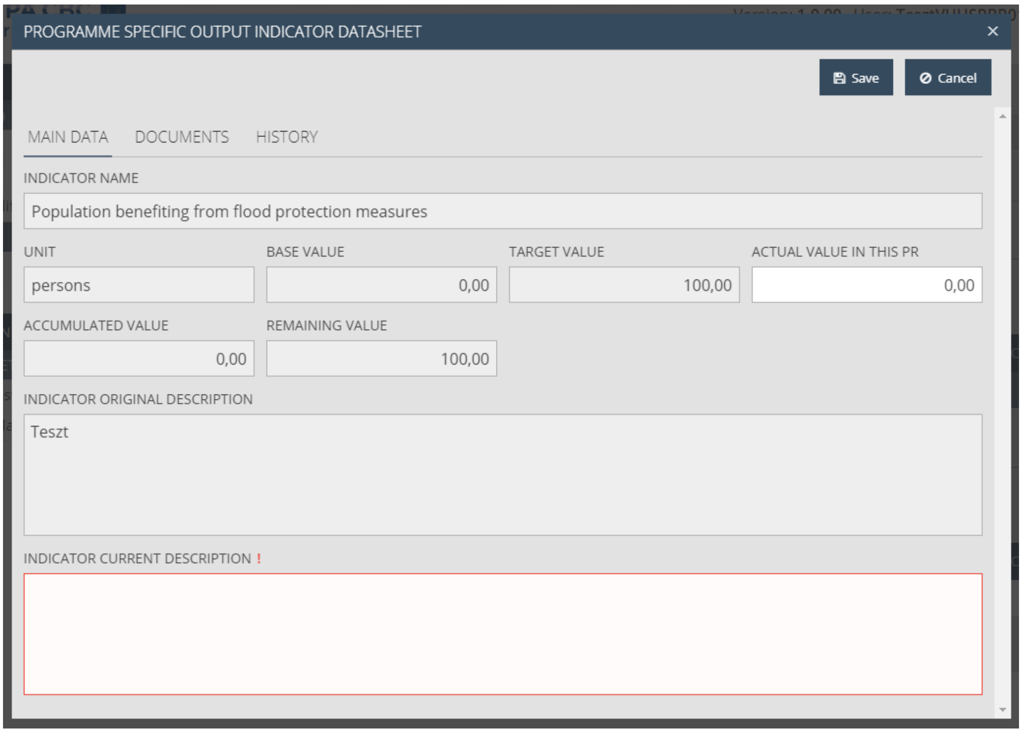
This tab contains a table showing the programme-level output and horizontal indicators undertaken in the project.



In order to enter the progress achieved in the period in question with regard to the indicator undertaken, please select the indicator and click on **Modify**. In order to view the data on an indicator, click on **View**.

4.5.1 Main Data

The Lead Beneficiary can enter indicator data here.



Field list:

- **Horizontal principle** – if relevant, the horizontal principle associated with the indicator is shown; filled out automatically
- **Indicator name** – the name of the indicator; filled out automatically
- **Unit** – the indicator's unit of measure; 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 in this PR** – please enter the indicator value achieved in the PR&AfR in question; that is, the change compared to the result achieved in the previous period.
- **Accumulated value** – filled out automatically based on the values accepted in the previous PR&AfR
- **Remaining value** – the remaining part is filled out automatically based on the target value and the accumulated value
- **Indicator original description** – the description in the commitment in the Project Report; filled out automatically
- **Indicator current description** – 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.

4.5.2 Documents

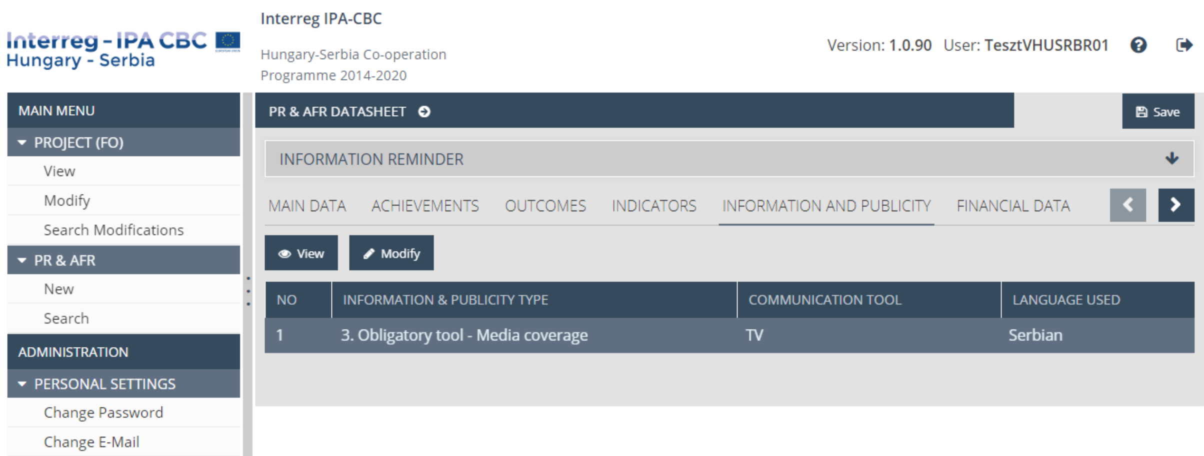
Here, you can submit and view the documents proving progress with regard to the indicator. The interface works the same way as the above described Documents interfaces.

4.5.3 Viewing the History

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

4.6 Information and Publicity Tab

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

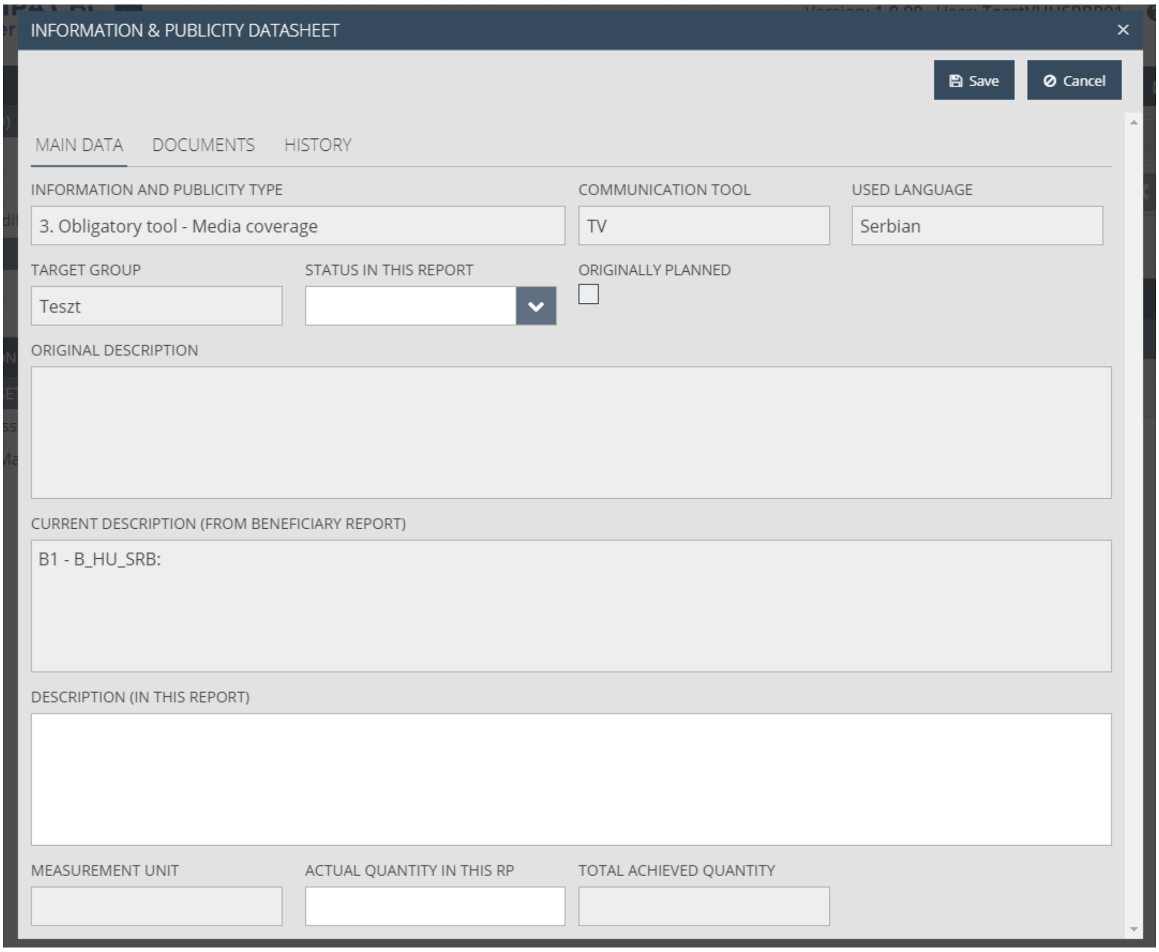


To provide information on a given activity, select it, then click on **Modify**. In order to view the data on an activity, click on **View**.

4.6.1 Modifying Information and Publicity Activities

4.6.1.1 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.



Field list:

- **Information & publicity type** – type of the information and publicity activity; filled out automatically
- **Communication tool** – the planned name / tool of the communication activity; filled out automatically
- **Used language** – the language used in the course of the activity; filled out automatically
- **Target group** – the target group reached in the course of the 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
- **Measurement unit** – the unit of measurement of the information and publicity activity; filled out automatically
- **Actual quantity in this report** – please enter the current quantity of the information and publicity activity – that is, the change compared to the results achieved in the previous period
- **Total achieved quantity** – total quantity of the information and publicity activity; filled out automatically based on the values accepted in the previous PR&AfR

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

4.6.1.2 Documents

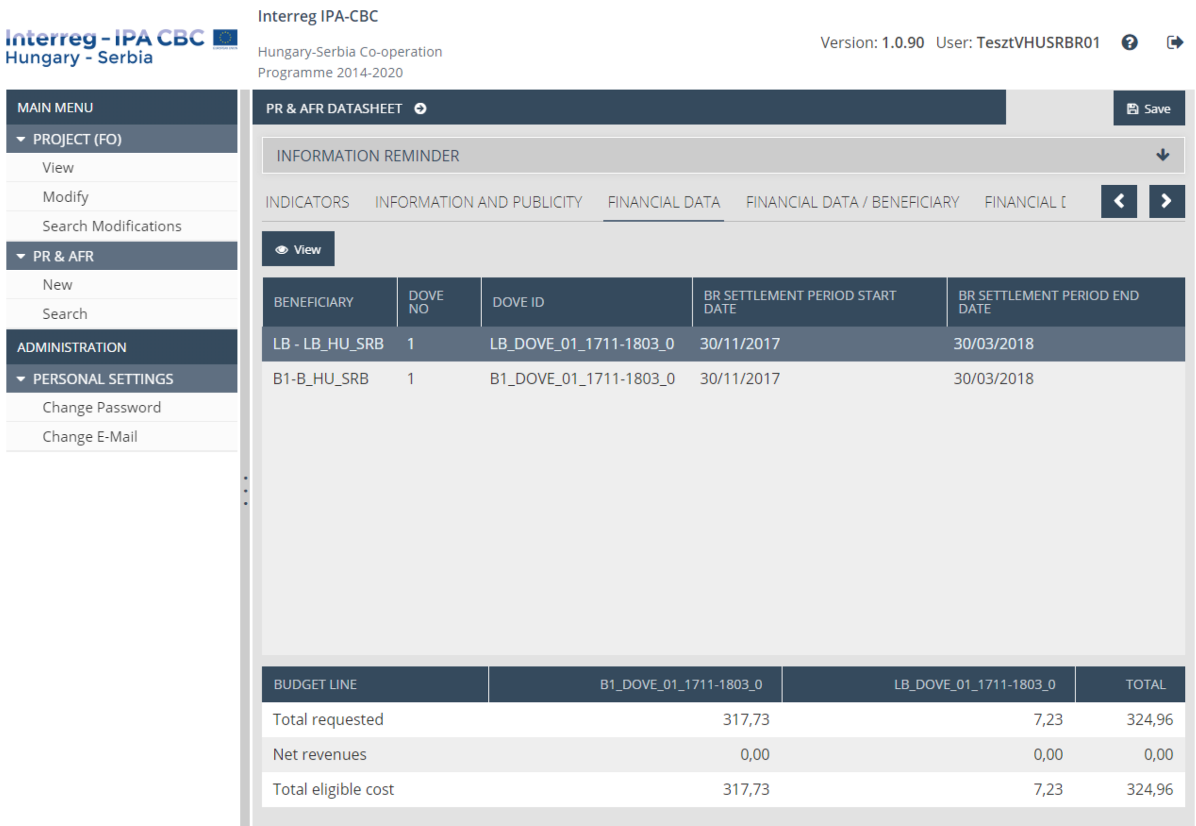
This interface works as described in previous Documents chapters above.

4.6.1.3 Viewing the History

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

4.7 Financial Data Interface

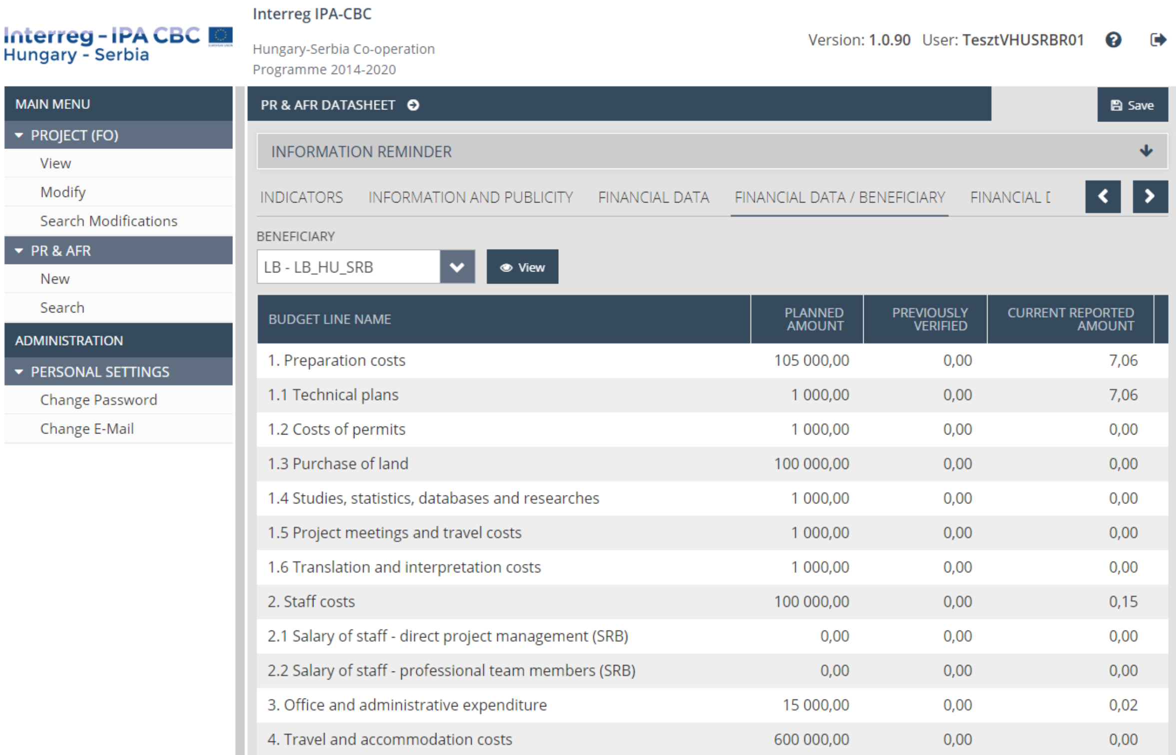
This is a read-only interface, showing key data on the DOVEs selected for the PR&AfR and the reports (reporting period) in the top table, and the total approved cost in total and by beneficiary in the bottom table.



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).

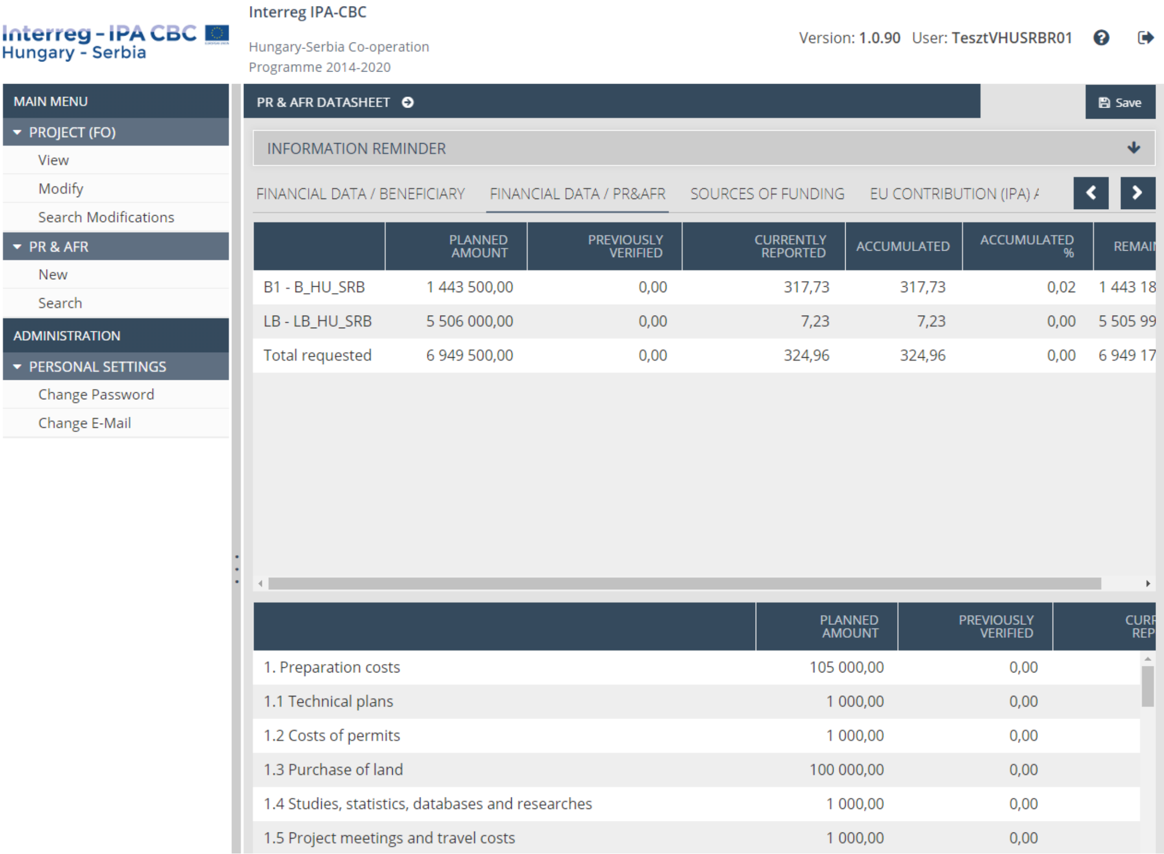
4.8 Financial Data / Beneficiary Tab

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.



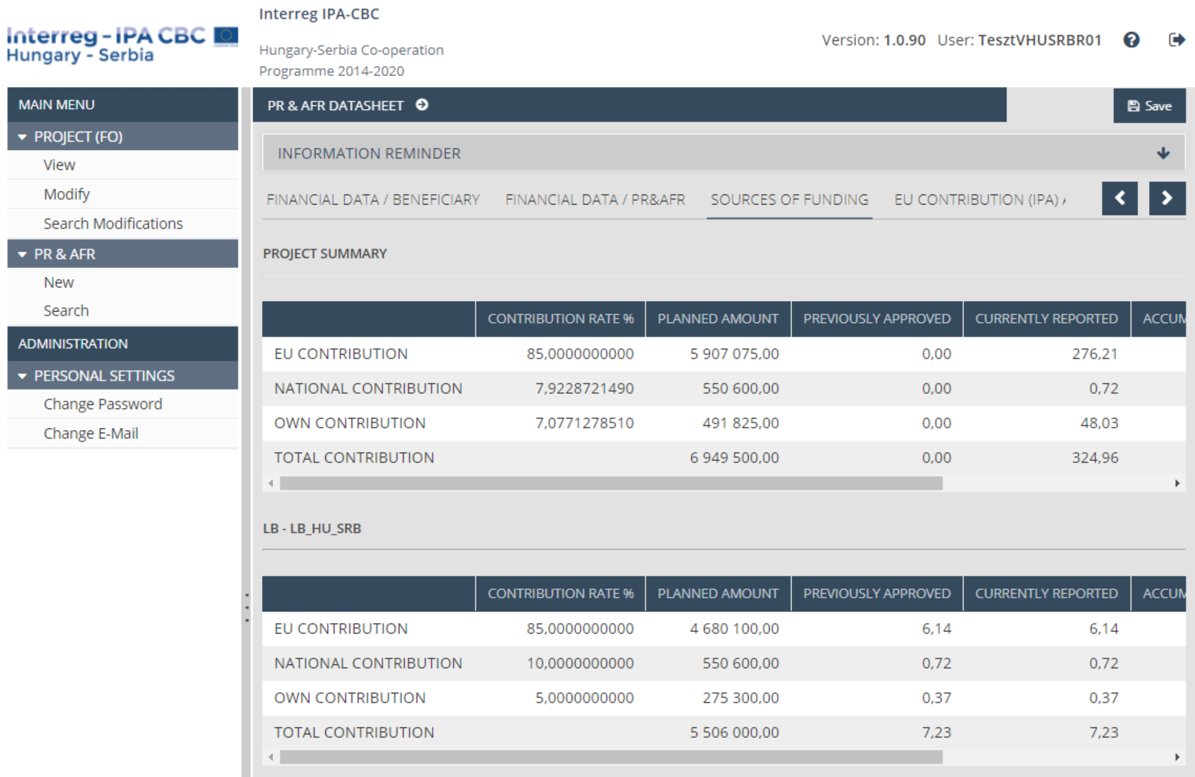
4.9 Financial Data / PR&AfR Tab

This is a read-only tab. The top two tables show beneficiary-level financial data summarised over the project's implementation period. The bottom two tables show the cumulated financial data of the project's implementation period budget line by budget line.



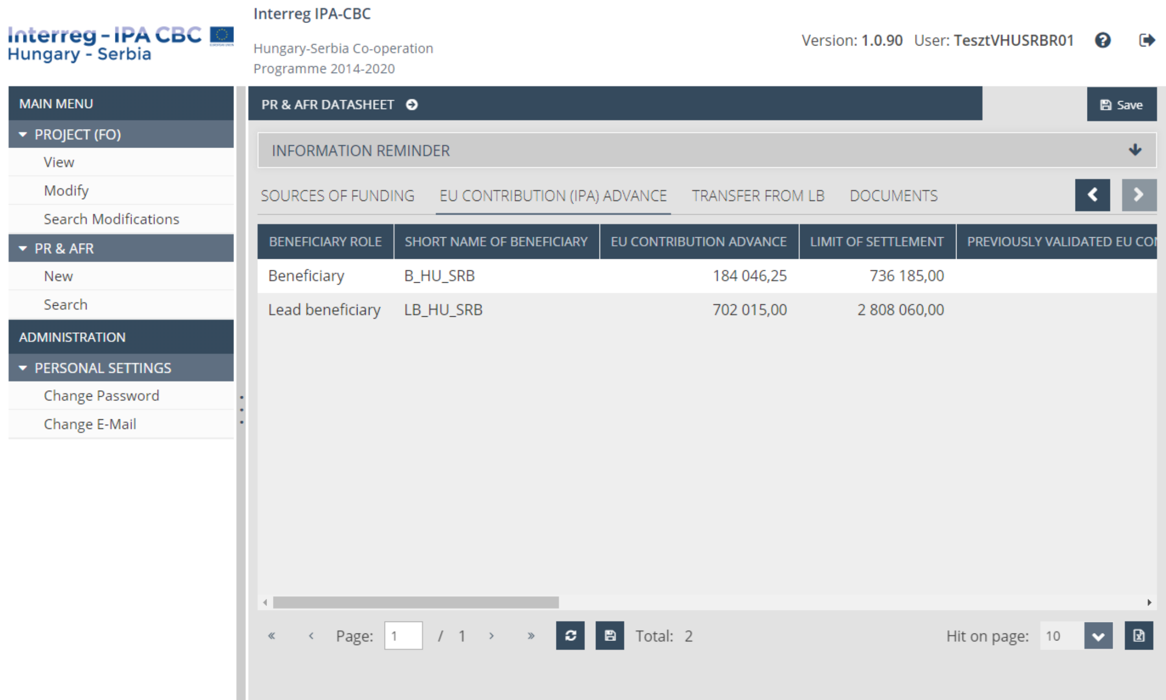
4.10 Sources of Funding Tab

This is a read-only tab showing cumulated PR&AfR financial data from the project's implementation period, first in total for all the project's beneficiaries, then separately for each beneficiary.



4.11 EU Contribution (IPA) Advance Tab

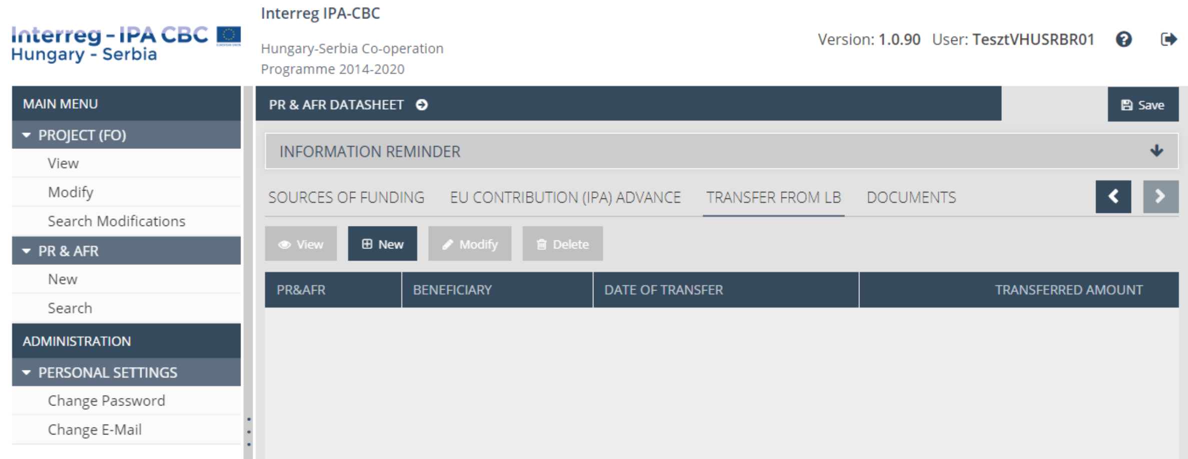
This is a read-only tab, displaying the figures on the IPA advance paid at the start of the project based on the previously approved expenses and the expenses in the current Project Report, beneficiary by beneficiary.



4.12 Transfer from LB Tab

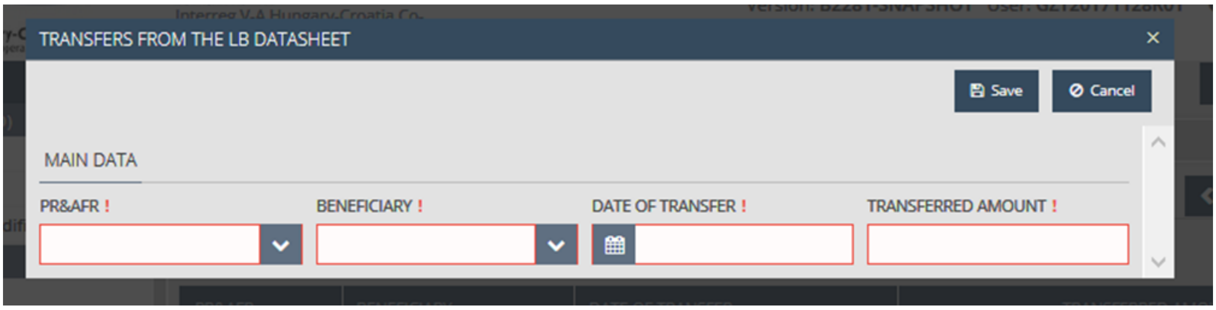
Here, you can enter and track the transfers made by the Lead Beneficiary to the beneficiaries in the course of the project (IPA advance paid at the start of the project and the forwarding of the relevant parts of the approved and paid previous PR&AfRs). The interface lists the data on transfers included in previous reports, and new items can be entered for the current period.

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**.



4.12.1 Entering Data on a New Transfer by the LB / Main Data

Here, you can enter data on transfers.



Field list:

- **PR&AfR** – please select the unique identifier of the relevant PR&AfR from the drop-down list. In case of the first PR&AfR, select “Advance” from the list if the IPA advance paid at the beginning of the project was forwarded to the beneficiaries.
- **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

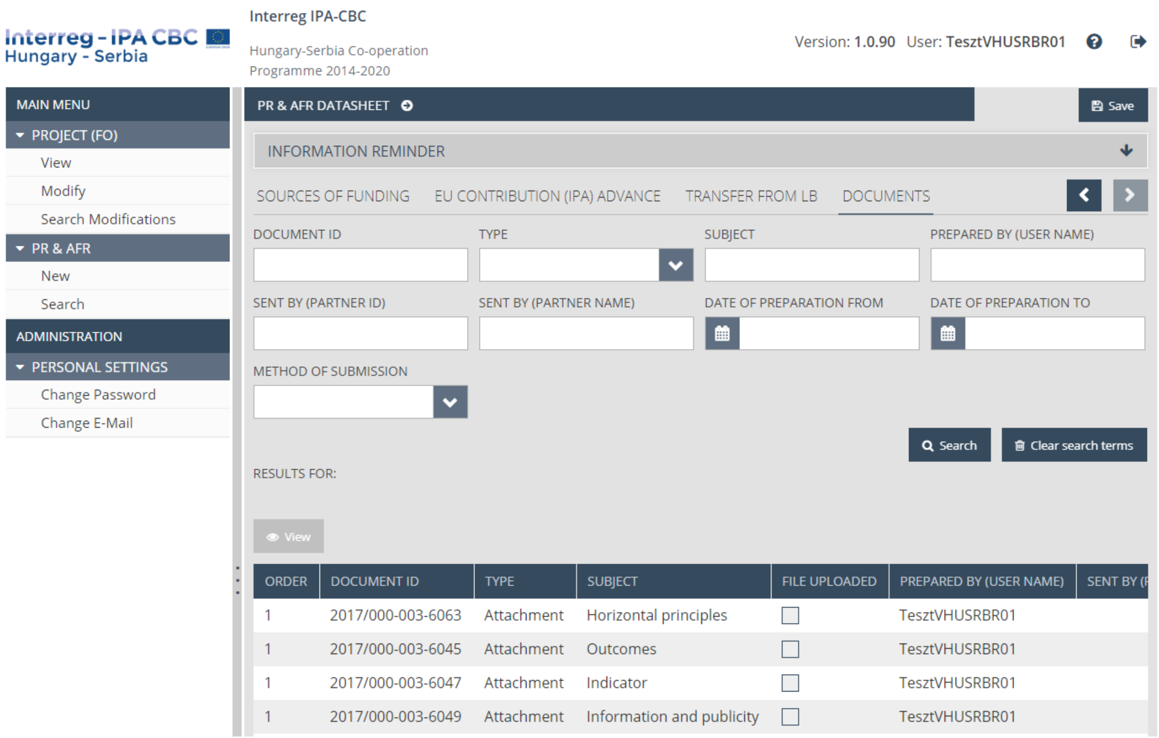
Click on **Save** to save the data entered, or click on **Cancel** to abort data entry and return to the previous tab.

4.12.2 Documents

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

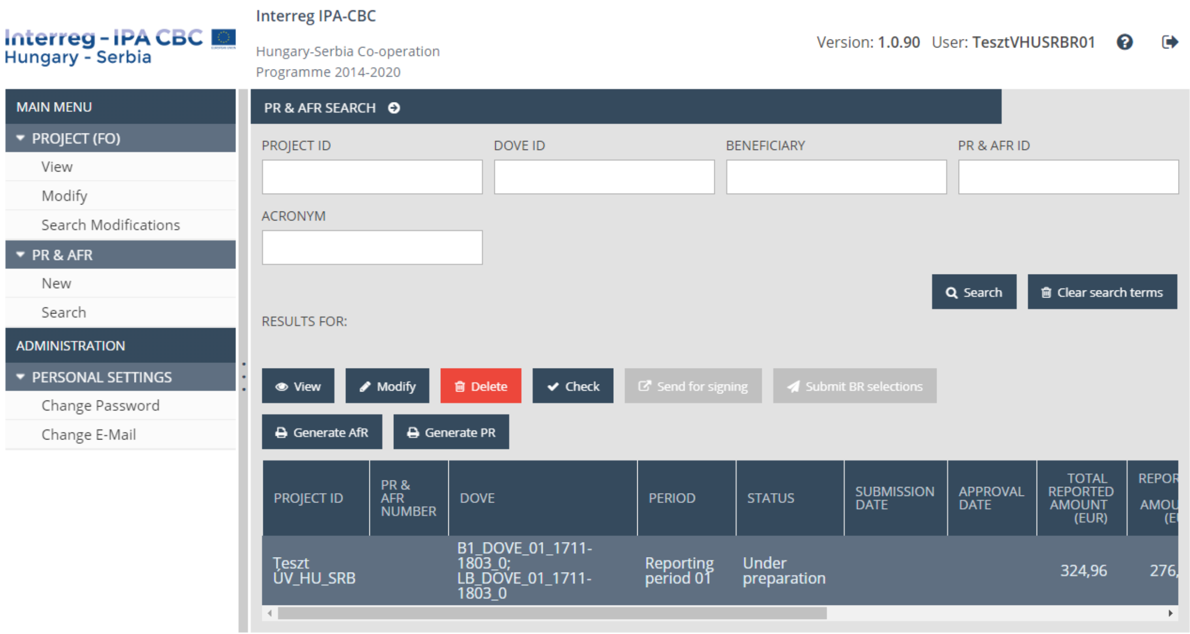
4.13 Documents Tab

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



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

5.1 Viewing the Project Report (PR&AfR)



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.

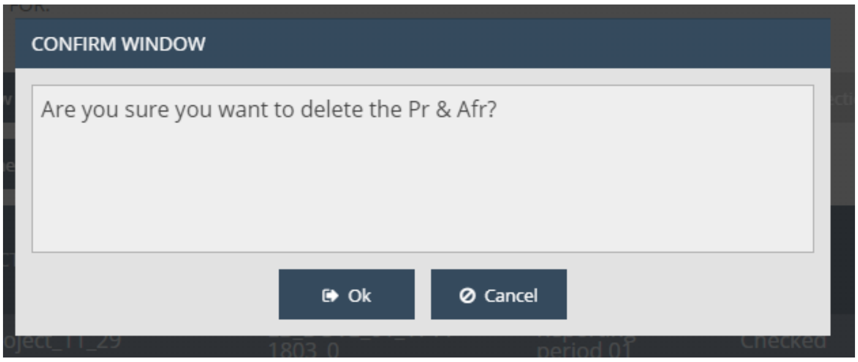
If the Secretariat carrying out the control of the submitted Project Report finds errors or issues that need clearing up, it will send the report back for correction. You will receive e-mail notification of this. In such cases, the application's status changes to *Need amendment*; when the issues are 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 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.

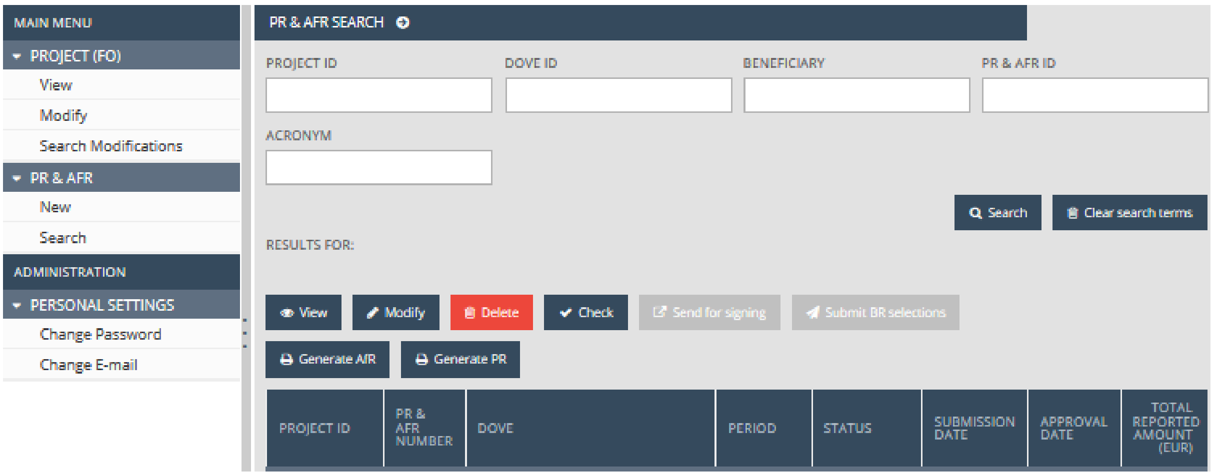
A confirmation prompt will open, in which the system asks you to confirm the deletion of the Project Report (PR&AfR). You can abort the deletion by clicking on Cancel. If you click on OK, the Project Report (PR&AfR) is deleted and its status is changed to Dropped in the search hit list.



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.

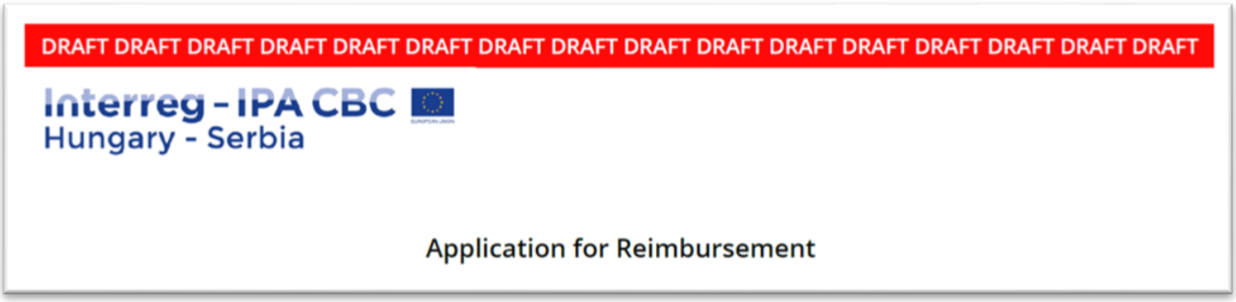
The deletion of Project Reports (PR&AfRs) cannot be undone, so please make sure you really want to delete the Project Report (PR&AfR) in question before clicking the OK button.

5.4 Generating Forms out of Project Reports (PR&AfRs)



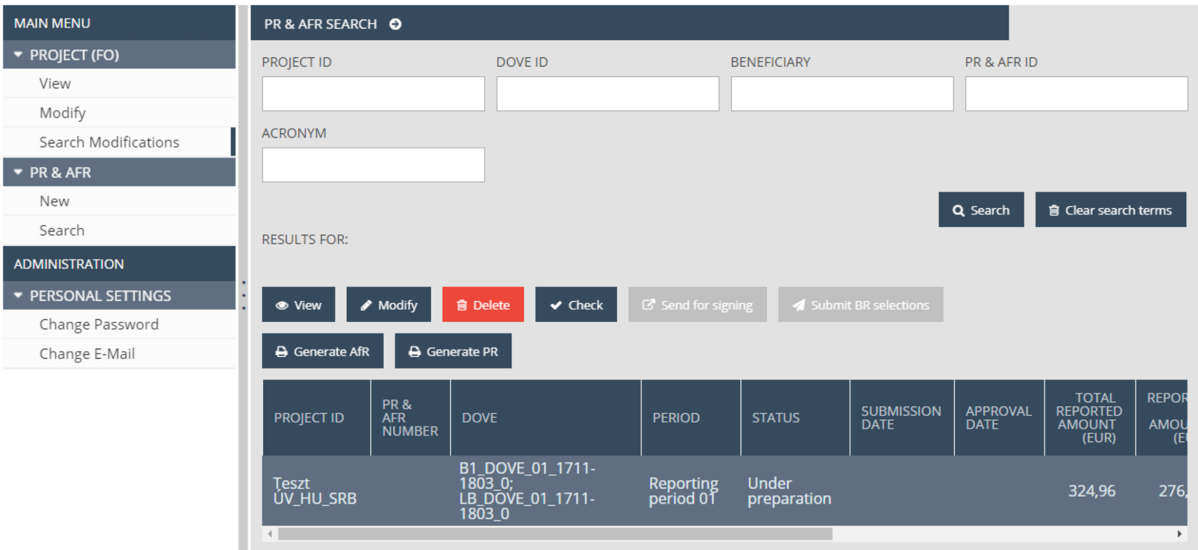
After saving your Project Report (PR&AfR), click on the Search menu item of the PR&AfR module to access the Project Report (PR&AfR) search feature. The hit list will show your previously created Project Reports (PR&AfRs). Click on the row of the Project Report (PR&AfR) that you would like to generate 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.



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

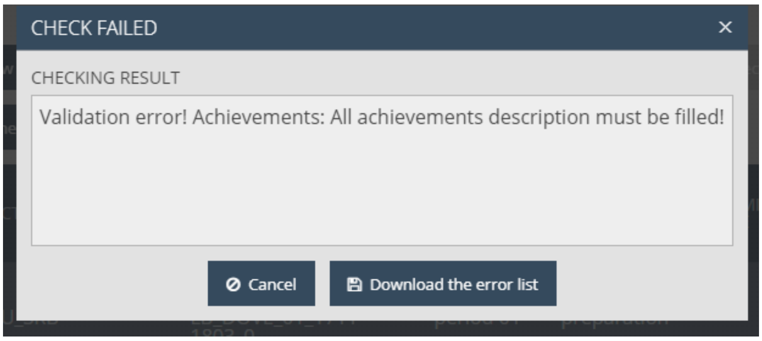
5.5 Finalising, Signing and Forwarding Project Reports – as a Recording User



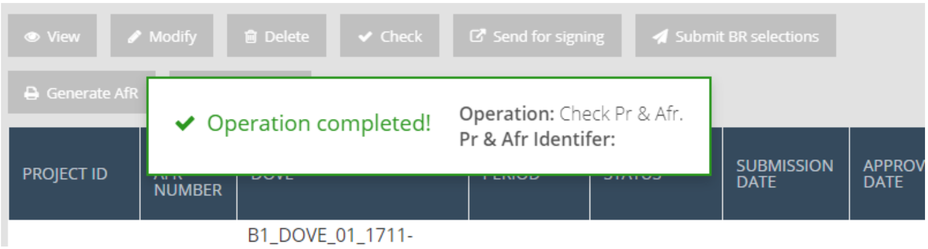
After filling out and saving your Project Report (PR&AfR), click on the Search menu item in the PR&AfR module to access the Project Report (PR&AfR) search feature. The hit list will show your previously created Project Reports (PR&AfRs). Click on the row of the Project Report (PR&AfR) that you would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

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.



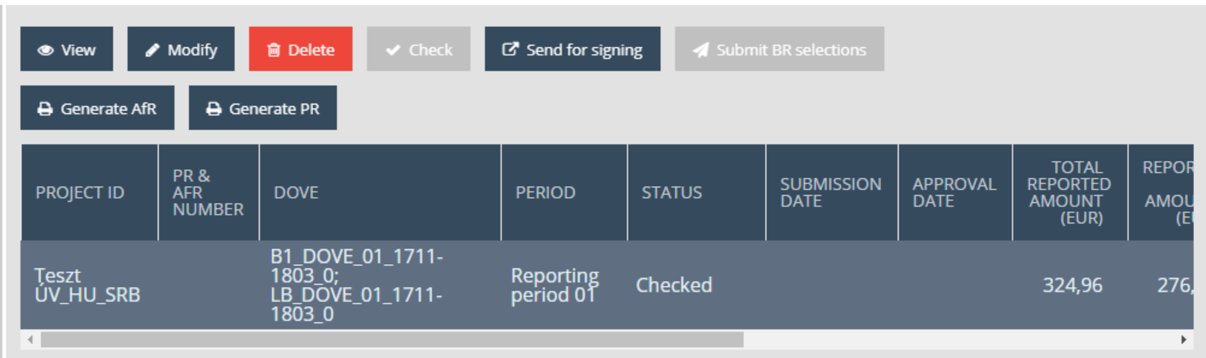
- **Check successful** – if the automatic check finds no errors in the Project Report (PR&AfR) to be submitted, the system notifies the Lead Beneficiary of the successful check in a pop-up window, and the Project Report (PR&AfR) is cleared for submission.



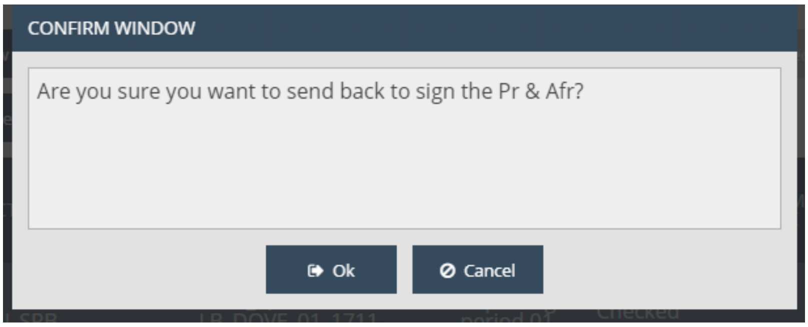
The **Check** feature can be used at any time; you can also run checks while working on your Project Report (PR&AfR).

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.

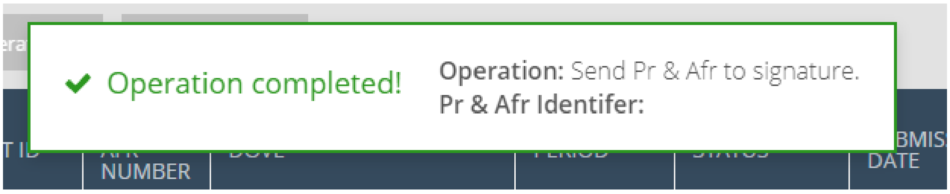
In order to submit the Project Report, click on the Search menu item of the PR&AfR module, select the desired Project Report, then click on **Send for signing**. (A successful automatic check is a prerequisite for submission; if the **Send for signing** button is inactive, run the check first by clicking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



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 submit the Project Report. 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.

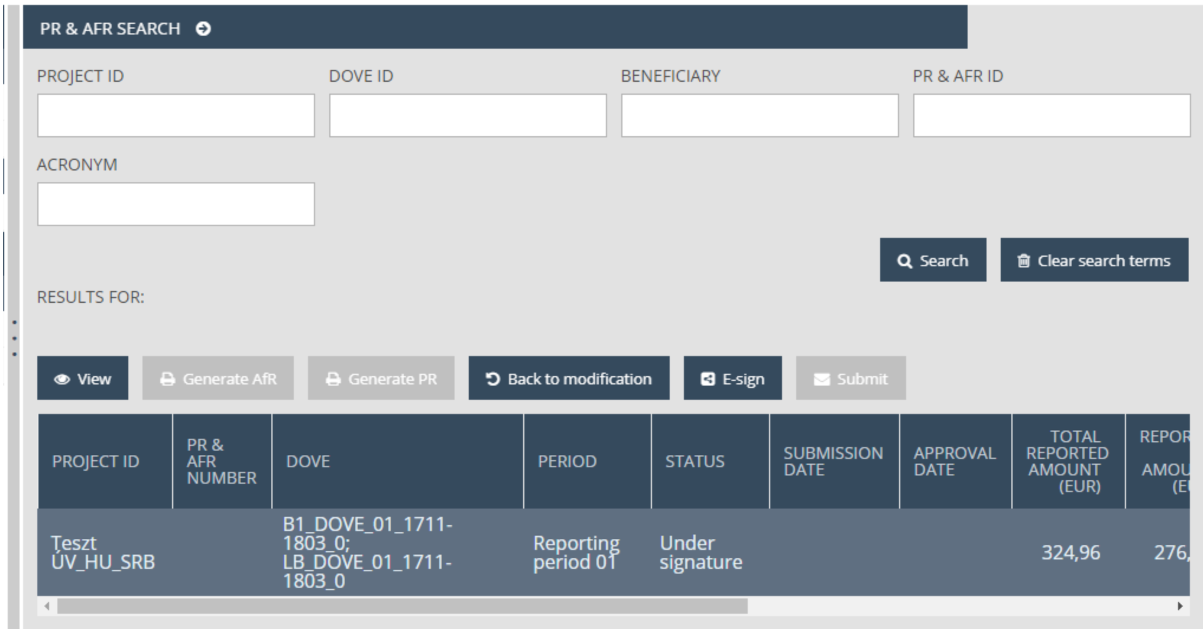


The final Project Report form can be downloaded from the "PR" and "AfR" folders on the Project Report's Documents worksheet at any time after submission – and the previously uploaded documents can be viewed or downloaded from the Project Report's Documents worksheet at any time as well. After submission, 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

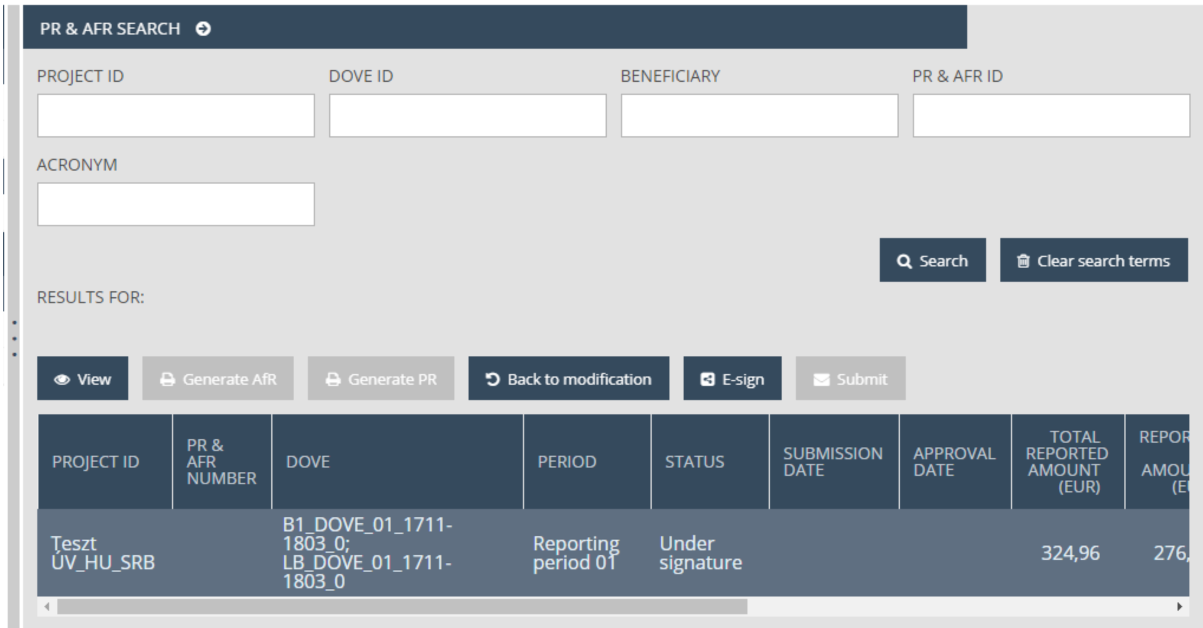
After a Project Report is saved, it needs to be signed electronically. This can be done as the signatory user assigned to the project.

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.

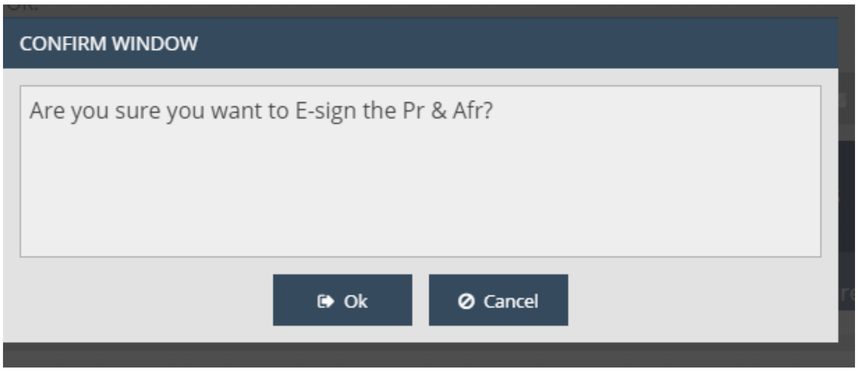


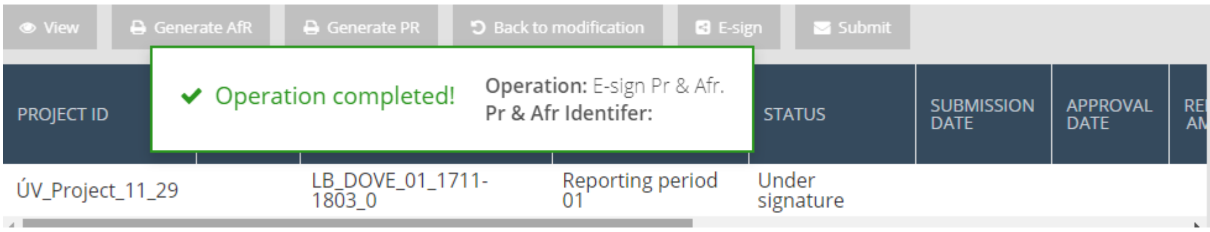
A confirmation prompt will open, in which the system asks you to confirm that you wish to send the Project Report back. You can abort the deletion by clicking on Cancel. If you click on OK, the Project Report is sent back to the user that is filling it out.

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 **E-sign** button above the hit list.

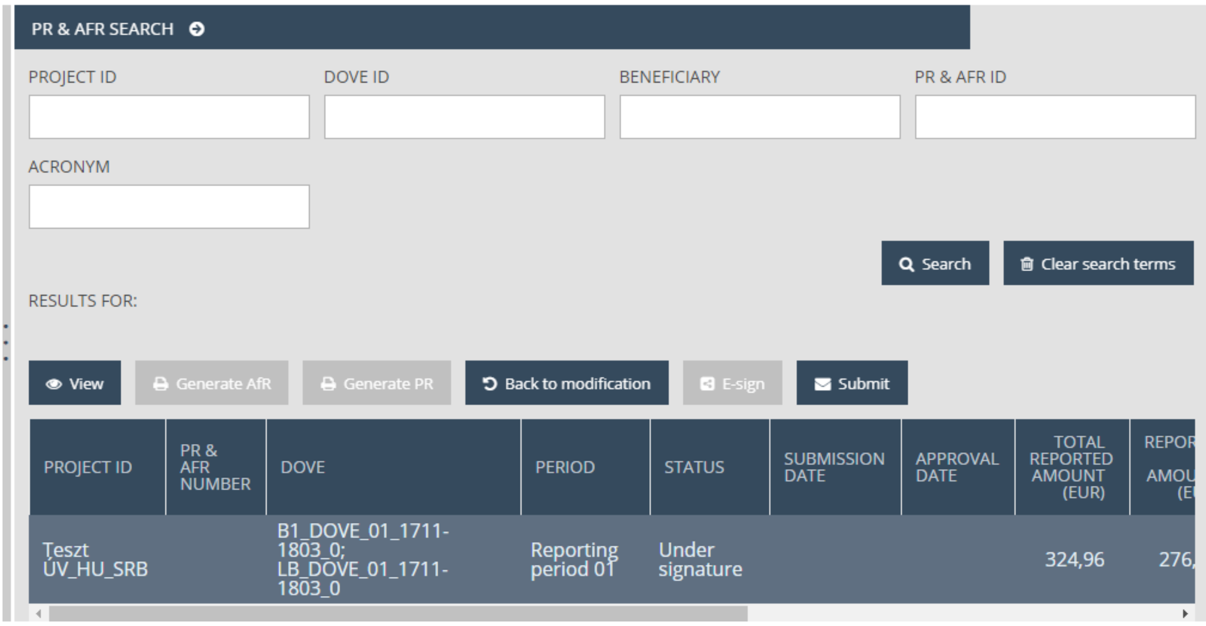


A confirmation prompt will open, in which the system asks you to confirm the electronic signing of the Project Report. You can abort the operation by clicking on **Cancel**. If you click on **OK**, the Project Report is signed.

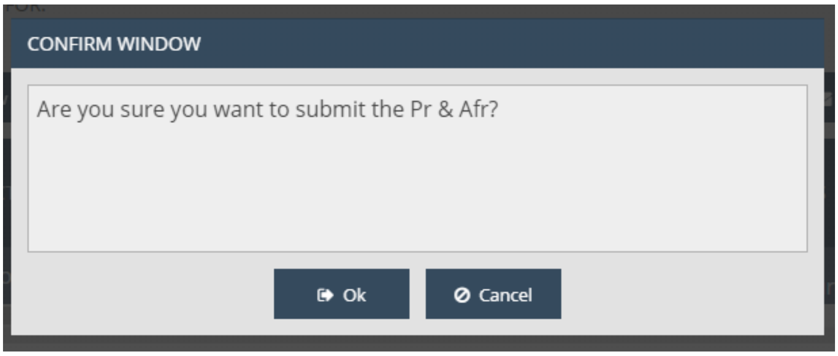




After the report is signed, it can be sent for certification. This can also be done by the signatory user assigned to the project. To do so, click on the Search menu item of the PR&AfR module in order to open the Project Report search feature, then click on the row of the Project Report in question,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



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 certified, and its status is changed to **Submitted**.



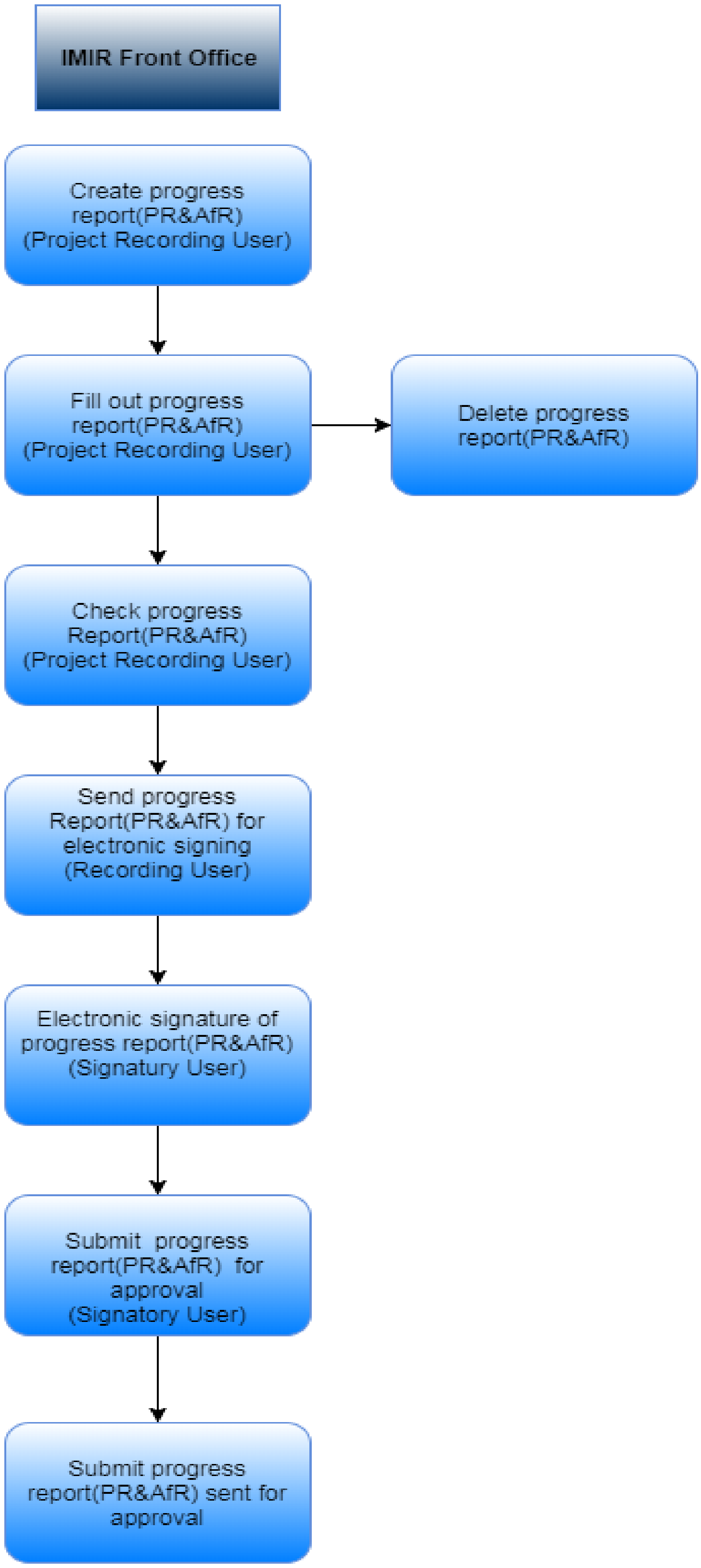
After submission, the status of the PR&AfR is changed to Submitted, and the relevant technical unit checks the Project Report.

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. You will receive e-mail notification of this. After the issues are resolved, the modified report needs to be re-submitted (as described in chapter 5).

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

5.7 The Submission Process

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



6 Project Modification Request

The submission of Project Modification Requests is only possible by filling in the Modification Request form and sending it to the responsible Programme Manager by e-mail. Based on agreed modifications, the Programme Manager enters the approved changes in the system.

Disclaimer:
This document has been produced with the financial assistance of the European Union.
The content of the document is the sole responsibility of the Joint Secretariat of the Interreg-IPA Cross-border Cooperation Programme Hungary-Serbia, hosted by the Széchenyi Program Office Nonprofit LLC. and can under no circumstances be regarded as reflecting the position of the European Union.

Interreg-IPA CBC Hungary-Serbia
Joint Secretariat

info@interreg-ipa-husrb.com

www.interreg-ipa-husrb.com

Good neighbours
creating
common future