



# **I N T E R R E G**

## ***INTERREG+ IT System*** **PROJECT REPORT**

for

**Interreg V-A Slovakia-Hungary Co-operation  
Programme 2014-2020.**

**User Manual – Front Office**

**v1.0.1**

## PROJECT REPORT - USER MANUAL FOR FRONT OFFICE

### Version History

| Date       | Version | Description                                  |
|------------|---------|--|
| 2021.01.15 | 1.0.0   | First version for INTERREG+ Project Report   |
| 2021.07.09 | 1.0.1   | Updated version for INTERREG+ Project Report |

## PROJECT REPORT - USER MANUAL FOR FRONT OFFICE

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## PROJECT REPORT - USER MANUAL FOR FRONT OFFICE

# 1. INTRODUCTION

### 1.1 PURPOSE OF THE DOCUMENT

The purpose of this document is to assist the Lead Beneficiaries of the Interreg V-A Slovakia-Hungary Cross-Border Cooperation Programme 2014-2020 in the INTERREG + system.

The document presents the steps and rules of Project Report (PR) submission in a process-oriented illustration.

### 1.2 WHO IS THIS DOCUMENT FOR

This document is intended for the users of the Lead Beneficiary sites who are required to report and have reporting and signing authority as set forth in the Project.

### 1.3 ACCESS MANAGEMENT

The users can access INTERREG+ IT system in order to manage PRs of the Project at the link provided here: <https://skhu.interregplus.eu>.

### 1.4 USER ACCOUNT

The User profiles in the INTERREG+ IT system are managed in so-called User accounts, where each User have their roles assigned, which determines what the User can do in the system and what modules they can use. A Front office User may have only one or several projects / project parts assigned to, where they can manage tasks regarding Project Reports. User can only edit and view Project Reports for the Project of which they are assigned to. For more information on User Management and user roles the User is referred to the User-management Tool User Manual.

For specific rules and policy on user management, please refer to the *User Manual for Lead Beneficiaries and Beneficiaries* of User Management Tool for INTERREG+ IT system document available on the official [Programme website](#).

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## 2. GENERAL REMARKS

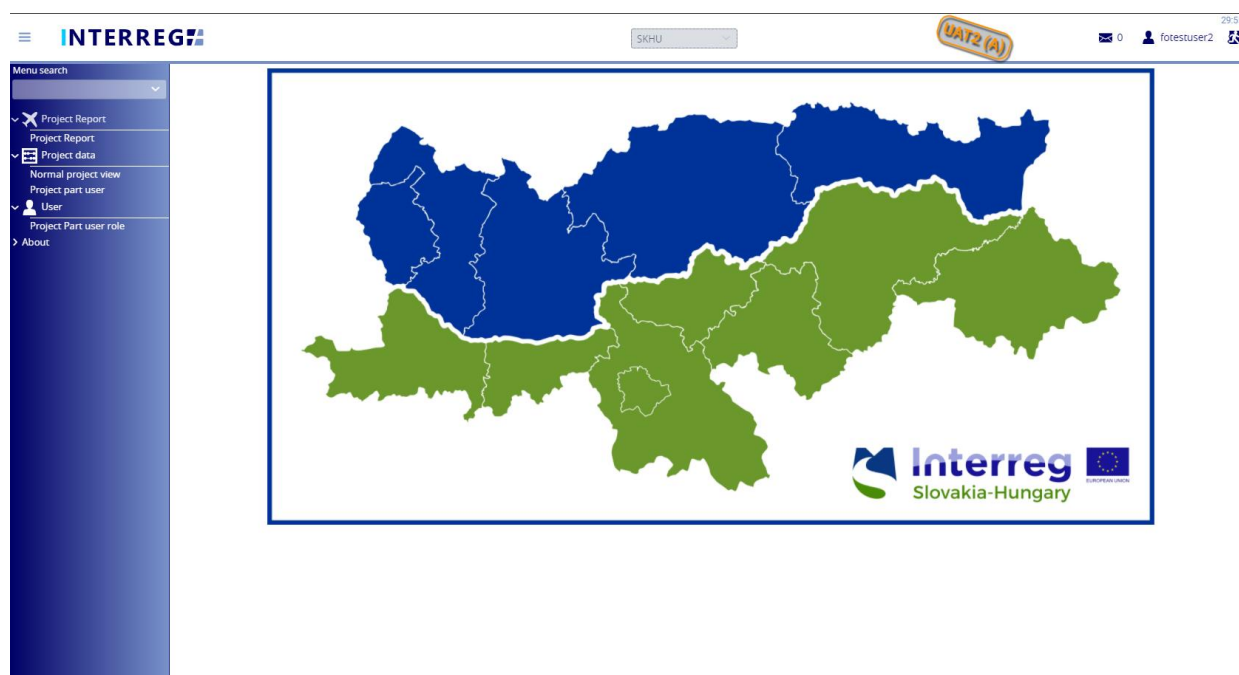
This chapter presents common functions that are accessible and operate in the same way on each screen of the system. Those functions are Project Report Main Menu and the Header, The 'Action buttons' and The 'Function' buttons.

### 2.1 THE PROJECT REPORT MAIN MENU AND HEADER

The Main Menu is set in the left side of the Header (Fig. 1); in here, the Project Report, the Project Data, and the User menu can be found, also optionally the Beneficiary Report menu (in case of bearing Project Part level roles). Whereas in the right the User Account menu access, the Sign-out button and the Messages menu are located. (Fig. 2).



1. INTERREG+ header



2. Main menu

The Main Menu is composed of submenus:

1. **The Project Report** submenu: through the Project Report submenu the Project Report management can be accessed.
2. **The Beneficiary Report** submenu (optional, see above): through this menu the Beneficiary Reports can be accessed and managed (for details see User Manual for Beneficiary Report Process),

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3. **Project data** submenu: The User can access data of projects that were assigned to the User through the **Normal Project view**, and optionally the **Project Part view** menu point.
4. **User** submenu: Through the **Project part user profile** menu point, the Recording User of the Lead Beneficiary can manage the incoming user role requests of all Beneficiaries of the Project (LB project part included) (see *User Management Tool User Manual*).
5. **About** submenu: provides information of the IT system version.

In the User Account menu the User's credentials, such as password, can be maintained. In the Messages, the User can manage their messages including sending new messages to other Users.

### 2.2 THE 'ACTION' BUTTONS

The „action buttons” are to manage the PR under preparation, they can be found at the bottom of the screen; they are always visible:



3. Action buttons





- The Project Report and Application for Reimbursement templates (in pdf format) can be generated at any time in the recording process by pressing the **Generate** button; the “DRAFT” watermark is printed on the documents. The final documents are generated automatically (without the watermark), when the PR is submitted to Back Office for approval.
- When the User presses the **Validate** button, the system runs a validation, if all the required fields have been filled in and if the built-in rules have been complied with. If an error or defect is detected, it is listed in the error message showing up at center top of the screen. If all mandatory fields are filled and all rules are complied with, a confirming message would appear.
- To save the recorded data and leave the PR (close the window) click **Continue later**. By doing so, all data will be saved with no validation running. (The User can return to PR from the Project Report list screen by clicking the **Continue** button after selecting the PR in question.)
- By pressing the **Drop** button, the report is deleted, but it remains viewable and its status is "Deleted". *Note, a dropped PR cannot be restored!*
- By pressing the **Send for signature** button, the process will proceed to the next step. The validation will run automatically and if the system does not detect any deficiency, the task moves to the signatory user's task list; the PR is no longer editable to the recording user.
- By clicking on the **Cancel** button, all recorded and unsaved data will be lost and the PR returns to the last saved state.

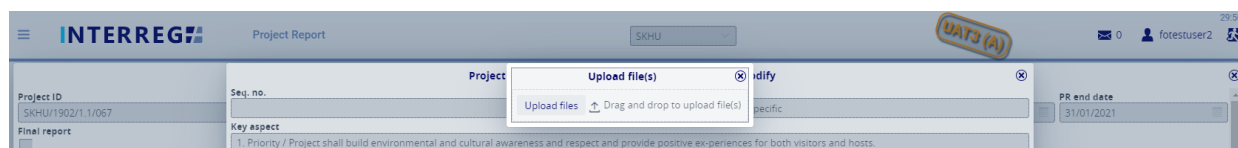
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- The **PR refresh** button will become active, if there is a project modification implied, which affects the given project. By refreshing the PR, the changes applied in the project modification will be applied in the PR as well. Until the PR is not refreshed by pressing the 'PR refresh' button, the PR cannot be sent for signature.








### 2.3 THE 'FUNCTION' BUTTONS

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

- the  (**View**) button initiates the viewing of a selected item (e.g. an Activity, Indicator, etc);
- the  (**Modify**) button initiates the modification of an already existing item (e.g. an Activity status, Indicator description, etc);
- the  (**Delete**) button deletes the selected item; *Note, if an item is deleted it can no longer be restored!;*
- the  (**Upload**) button initiates a pop-up communication panel where the User can either browse among the files on the computer or just simply drag and drop even multiple files at once; the upload button is usually placed in forms;



4. Upload file(s) communication panel

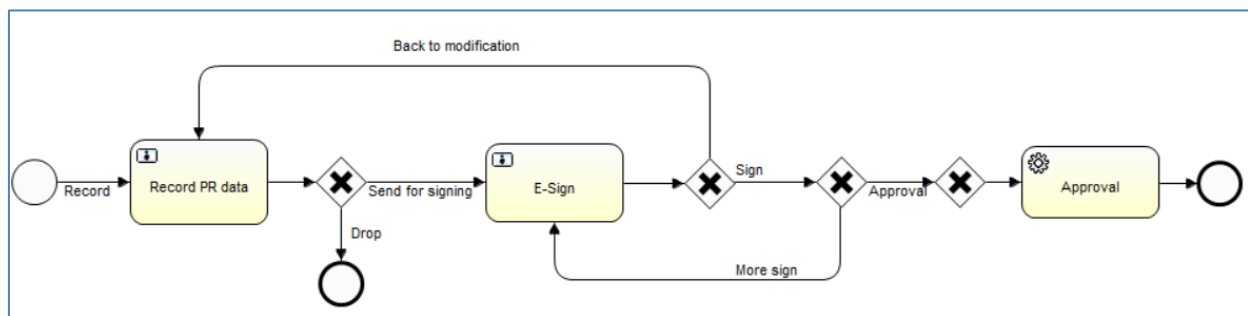
- the  (**Download**) and the  (**Download as zip**) button allows downloading even multiple selected files from the list at once
- the    (**Export to**) buttons initiates exporting the content of the list screen into the selected format (xlsx, docx, pdf). *Note that the function would exports the visible content of the screen list. If a screen is expandable, remember to expand it, otherwise the hidden content will not be exported!*
- by the  and  (**info**) button the details of a field can be viewed.

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### 3. PROJECT REPORT

The purpose of the INTERREG+ Project Report (PR) Front Office interface is for Lead Beneficiaries to submit their reports on the progress in implementation of the project concerned.

The steps to submit a new PR are summarized in the figure below:



5. Recording workflow

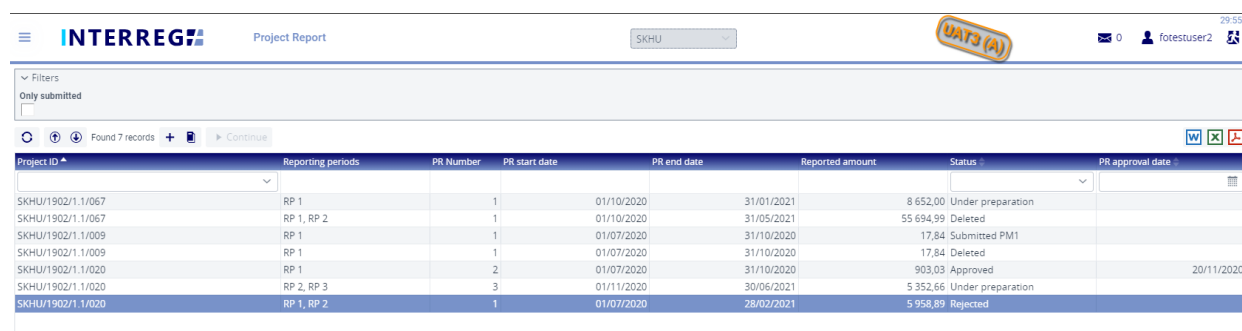
1. PR Recording: Recording Users are authorized to record PRs
2. PR Submission: After recording the PR data, the Signatory User(s) is (are) entitled to endorse (E-sign and submit) the PR or return it back to further recording / modification (Back to modification) to the Recording User. Signatory User(s) cannot edit PR data. After the last Signatory user's (in case of more than one) endorsement, the PR is submitted and appears in the Back Office interface as unattended task.
3. It is not possible to submit the PR without the e-signature of all signatory users of the Project.
4. PR Approval: After submission, the PR will be validated by the responsible programme managers in the INTERREG+ Back Office interface. The LB User can follow the status of the PR during the approval process the Front Office interface, and will be notified of the final decision via automatic e-mail.

PRs are status-managed, it allows the user to keep track of the progress of the respective PR.

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### 3.1 RECORDING NEW PROJECT REPORT

The recording of a new PR can be started via the Project Report menu item. Previously recorded PRs are listed in the list screen. The user can only view PRs of the Project, to which the user is assigned to as a Lead Beneficiary.



The screenshot shows the 'Project Report' menu item selected in the top navigation bar. Below the navigation bar, there is a filter section with 'Only submitted' selected. A table displays the list of project reports with the following columns: Project ID, Reporting periods, PR Number, PR start date, PR end date, Reported amount, Status, and PR approval date. The table contains 7 records.

| Project ID        | Reporting periods | PR Number | PR start date | PR end date | Reported amount | Status            | PR approval date |
|-------------------|-------------------|-----------|---------------|-------------|-----------------|-------------------|------------------|
| SKHU/1902/1.1/067 | RP 1              | 1         | 01/10/2020    | 31/01/2021  | 8 652,00        | Under preparation |                  |
| SKHU/1902/1.1/067 | RP 1, RP 2        | 1         | 01/10/2020    | 31/05/2021  | 55 694,99       | Deleted           |                  |
| SKHU/1902/1.1/009 | RP 1              | 1         | 01/07/2020    | 31/10/2020  | 17,84           | Submitted PM1     |                  |
| SKHU/1902/1.1/009 | RP 1              | 1         | 01/07/2020    | 31/10/2020  | 17,84           | Deleted           |                  |
| SKHU/1902/1.1/020 | RP 1              | 2         | 01/07/2020    | 31/10/2020  | 903,03          | Approved          | 20/11/2020       |
| SKHU/1902/1.1/020 | RP 2, RP 3        | 3         | 01/11/2020    | 30/06/2021  | 5 352,66        | Under preparation |                  |
| SKHU/1902/1.1/020 | RP 1, RP 2        | 1         | 01/07/2020    | 28/02/2021  | 5 958,89        | Rejected          |                  |

6. Project Report list

The main rules for PR creation are:

- Recording of a new PR for any given reporting period can only be started if the previous PR has been submitted, i.e. it is in Submitted status.
- Only one PR can be edited at a time unless a PR has been returned for completion (status: need amendment).
- Another PR cannot be submitted for validation until the PR previously submitted PR is not validated (Approved / Rejected).
- The number (#) of deleted PRs will be reassigned.
- Only accepted BRs (i.e. BRs of status of Approve or closed without validation) are listed on the BR selection screen, in the first step of PR creation.

#### 3.1.1 Creating New Project Report

Recording of a new PR can be initiated by clicking the (+) button. As a result a communication panel pops in, where – after setting the appropriate Project ID (in case of being assigned to more than one projects) – the BR selection can be made. As a default setting, the system selects all accepted BRs independently of their reporting period, however, the user can select which ones shall be included in the given PR by leaving the ticks in. The reporting period, covered by the PR, depends on the reporting period(s) of the selected BRs.

By clicking on Continue, the PR is generated based on the BR selection.

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| Project part ID      | BR Number | BR start date | BR end date | Status   | PR's relevant                       |
|----------------------|-----------|---------------|-------------|----------|-------------------------------------|
| SKHU/1901/3.1/002/LB | 1         | 01/01/2020    | 31/08/2020  | Approved | <input checked="" type="checkbox"/> |
| SKHU/1901/3.1/002/B1 | 1         | 01/01/2020    | 31/08/2020  | Approved | <input checked="" type="checkbox"/> |

### 7. Project Report – new

#### 3.1.2 Main data

Under this tab (the first on the tab header), the most important information of the given PR is found, such as period covered by the given PR, financial information on BRs selected, etc.

This tab is only for displaying information, there are no editable fields.

| Role             | Beneficiary      | English name  |
|------------------|------------------|---------------|
| Lead Beneficiary | LB - SK - Muzla  | Town of Muzla |
| Beneficiary 1    | B1 - HU - Szivek | Szivek Péter  |

| Reported amounts in BRs |                                       |   |  |
|-------------------------|---------------------------------------|---|--|
| Total reported amount   | Total reported EU contribution amount | Total reported national contribution amount | Total reported own contribution amount |
| 4 989,60                | 4 241,16                              | 498,96                                      | 249,48                                 |

| Approved amounts in BRs |                                       |  |  |
|-------------------------|---------------------------------------|--|--|
| Total accepted amount   | Total accepted EU contribution amount | Total accepted state contribution amount | Total accepted own contribution amount |
| 4 488,15                | 3 814,92                              | 448,81                                   | 224,42                                 |

### 8. Main data

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### 3.1.3 Achievements, Horizontal Principles

The Achievements tab displays the questions concerning the overall progress of the Project implementation to be reported in the Project Report.

| Seq. no. | Question type                             | Key aspect  | Description   |
|----------|---|---|---|
| 1        | Achievement                               | Summary of the project achievements:  | The aim of this activity is to show the system of social enterprises, their legislativ... |
| 2        | Achievement                               | Problems, deviations encountered  | The aim of this activity is to show the system of social enterprises, their legislativ... |
| 3        | Horizontal principle - PA specific        | 1. Priority / Project shall build environmental and cultural awareness and respect... | The project is oriented to protect the cult. and hist. heritage and environm. and c...    |
| 4        | Horizontal principle - PA specific        | 1. Priority / Project provides direct benefits for conservation and generates bene... |   |
| 5        | Horizontal principle - Programme specific | Equal opportunities and non-discrimination: Project must be transparent and m...      |   |

9. Achievements, Horizontal principles – list screen

By selecting an item from the list and clicking on the **Modify** button, a communication panel pops in, where the User may record the description of project level progress in the 'Current description (by LB)' field. Once the modification is made, the recording has to be finalized by the 'Save' button

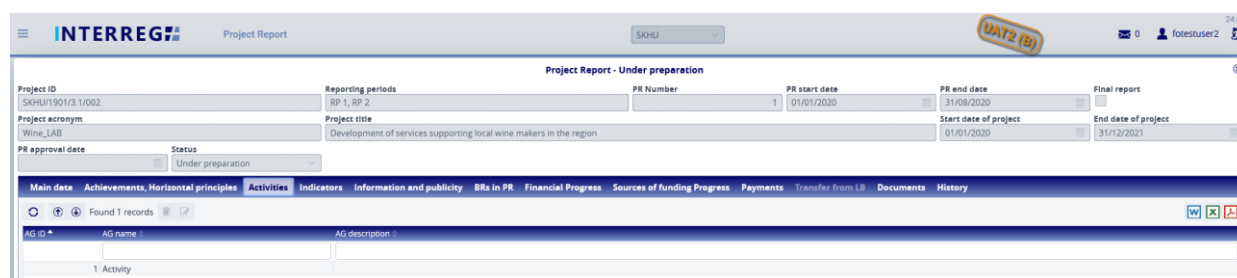
| File name              | Title | Creation date       | Subject | Created by  | Version | Generated | Not relevant |
|------------------------|-------|---------------------|---------|-------------|---------|-----------|--------------|
| Testsz rendersezer.png |       | 19/01/2021 10:44:29 |         | fotestuser2 |         |           |              |

10. Achievements, Horizontal principles – Modify

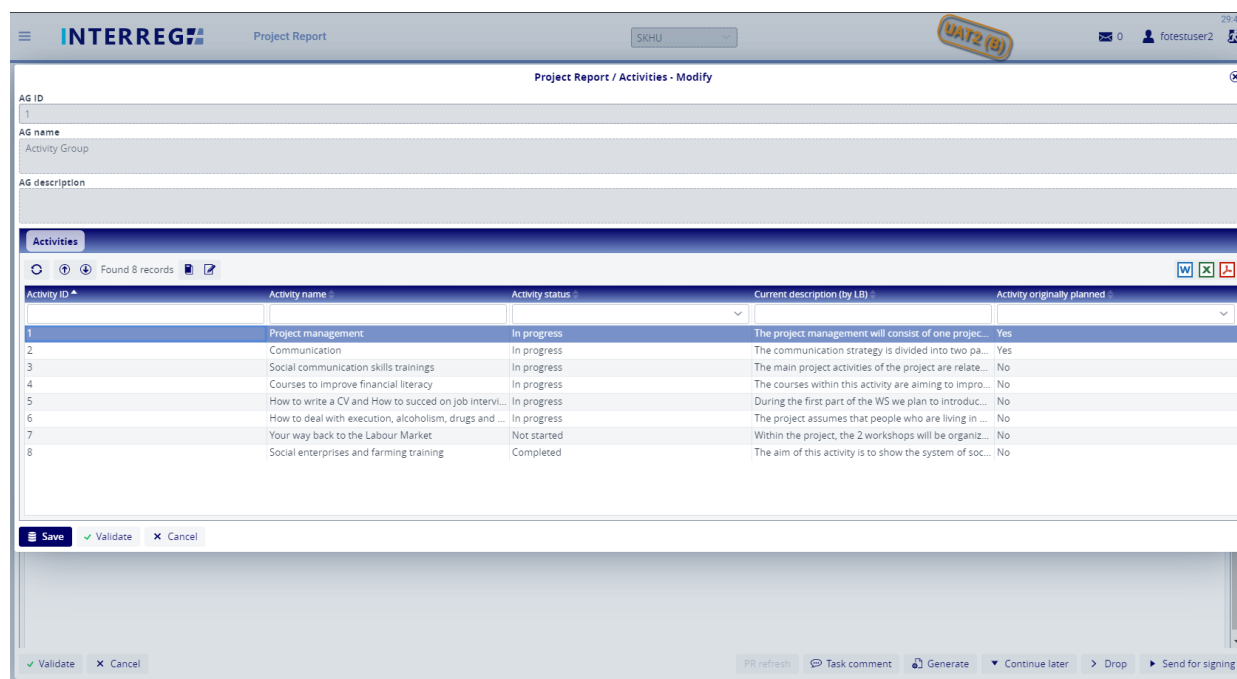
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### 3.1.4 Activities

In the INTERREG+ system the Activities are grouped into Activity Groups (AG) providing the ease of navigating among the different Activities. After selecting the AG of interest, the Activities within can be accessed by the **Modify** button.



11. Activities – Activity Group list screen



82. Activities – Modify 1

By selecting the Activity of interest, the Activity form opens for modification by the **Modify** button. On the Activity form, the User can set the current status of the Activities recorded on the Project Part and provide description of the progress regarding the current report in the associated text description field. As a hint, the progress of Project Part level is displayed in the '*Current description (from BRs)*' field.

The status of each Activity must be equal to or higher than their status in the previous report.

In the Documents tab the supporting documents can be uploaded by the **Upload** button. In the History tab, the Users can view the status and description were given in previous BRs providing an easy navigation between reports of the same Activity.

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| File name         | Title | Creation date       | Subject | Created by | Version | Generated | Not relevant |
|-------------------|-------|---------------------|---------|------------|---------|-----------|--------------|
| Test Document.png |       | 19/01/2021 09:17:47 |         | foetuser2  |         |           |              |

9. Activities – modify 2

### 3.1.5 Indicators

| Indicator ID | Indicator Name                  | Indicator category | Indicator type | Base value | Target value | Indicative value (from BR) | Actual value in this PR |
|--------------|---------------------------------|--------------------|----------------|------------|--------------|----------------------------|-------------------------|
| CO44         | CO44 Labour market and tra...   | Common specific    | Output         |            | 0,00         | 100,00                     | 1,00                    |
| O312         | O312 Number of women in jo...   | Programme specific | Output         |            | 0,00         | 40,00                      | 1,00                    |
| O313         | O313 Number of participants ... | Programme specific | Output         |            | 0,00         | 20,00                      | 1,00                    |
| R310         | R310 Increase in the employ...  | Programme specific | Result         |            | 63,20        | 65,20                      | 0,00                    |

10. Indicators – list screen

The Indicators tab displays Indicators recorded in the Project. The reporting of an Indicator can be started by selecting the Indicator of interest and clicking on the **Modify** button.

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| Relevant Beneficiary        | BR Number | Base value | Target value | Indicative value (from BR) | Actual value in this PR | Current description (from BR) |
|-----------------------------|-----------|------------|--------------|----------------------------|-------------------------|-------------------------------|
| LB - SK - EGTC Via Carpatia | 1         | 0,00       | 100,00       | 1,00                       | 1,00                    | BR1: 1                        |

11. Indicator – modify

The project level progress of the respective indicator has to be provided in the 'Current description by LB'. On the History tab, the User can view the status and description were given in previous BRs. As a hint, the progress of Project Part level is displayed in the 'Current description (from BRs)' field.

In the Documents tab the supporting documents can be uploaded by the **Upload** button. In the History tab, the User can view the status and description were given in previous PRs.

16. Indicators – Actual value modification

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The actually achieved, project level values of the respective Indicator must be provided by selecting the relevant Beneficiary's entry in the middle part of the communication panel and clicking the **Modify** button. In the opening window, the only editable field is the 'Actual value in this PR'; here the LB can enter the actual value of the respective Indicator. As a hint, the value reported in the Beneficiary report is also shown. This step must be completed for all Beneficiaries' entry in the list. The entered values are shown summed up in the 'Actual value in this PR' of the main Indicator communication panel.

| Relevant Beneficiary         | BR Number | Base value | Target value | Indicative value (from BR) | Actual value in this PR | Current description (from BR) |
|------------------------------|-----------|------------|--------------|----------------------------|-------------------------|-------------------------------|
| LB - SK - EGTC Via Carpathia | 1         | 0,00       | 100,00       | 1,00                       | 10,00                   | BR1: 1                        |
|                              |           | 1,00       | 10,00        |                            |                         |                               |

17. Indicators – cumulated value of the respective Indicator

### 3.1.6 Information & Publicity

| Information & Publicity Type | Communication tool | Planned Language | Originally planned                  | Status in this report |
|------------------------------|--------------------|------------------|-------------------------------------|-----------------------|
| Promotion materials          | Other              | HU-SK            | <input checked="" type="checkbox"/> | In progress           |

12. Information & Publicity – list screen

In the Information & Publicity tab, the communication-related progress of the commitments undertaken by the Project must be recorded.

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13. Informaion & Publicity modify

By selecting an entry from the list and clicking on the **Modify** button, the status, the description, and other measurements of actual quantity and the number of reached people for the respective Information & Publicity item can be provided, and the current status of the respective Information & Publicity item provided. As a hint, the progress of Project Part level is displayed in the '*Current description (from BRs)*' field.

The status of each Activity must be equal to or higher than their status in the previous report.

In the Documents tab the supporting documents can be uploaded by the **Upload** button. In the History tab, the User can view the status and description were given in previous PRs.

### 3.1.7 BRs in PR

20. BRs in PR

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Under the BRs in PR tab, those Beneficiary Reports can be navigated to, by selecting any of them and clicking on the (information) button, which are involved in the respective Project Report. For details on contents of Beneficiary Report, please refer to the Beneficiary Report User Manual.

Supporting documents uploaded in the respective BRs can be find under the BR's Documents tab.

### 3.1.8 Financial Progress

**Project Report - Under preparation**

Project ID: SKHU/1802/3.1/002 | Reporting periods: RP 1 | PR Number: 1 | PR start date: 01/09/2020 | PR end date: 31/12/2020

Project acronym: Find your way | Project title: Find your way to the labour market | Start date of project: 01/09/2020

End date of project: 31/12/2021 | PR approval date: | Status: Under preparation

**Financial Progress**

| No. | Budget Lines                          | Planned Amount    | Previously Validated Amount | Current Report Amount | Accumulated Amount | Accumulated Share | Remaining Budget Amount |
|-----|---------------------------------------|-------------------|-----------------------------|-----------------------|--------------------|-------------------|-------------------------|
| > 1 | Preparation costs                     | 0,00              | 0,00                        | 0,00                  | 0,00               | 0,00 %            | 0,00                    |
| > 2 | Staff costs                           | 30 000,00         | 0,00                        | 3 650,40              | 3 650,40           | 12,17 %           | 26 349,60               |
| > 3 | Office and administrative expenditure | 4 500,00          | 0,00                        | 547,56                | 547,56             | 12,17 %           | 3 952,44                |
| > 4 | Travel and accommodation costs        | 1 100,00          | 0,00                        | 0,00                  | 0,00               | 0,00 %            | 1 100,00                |
| > 5 | External expertise and services costs | 73 488,87         | 0,00                        | 0,00                  | 0,00               | 0,00 %            | 73 488,87               |
| > 6 | Equipment expenditure                 | 0,00              | 0,00                        | 0,00                  | 0,00               | 0,00 %            | 0,00                    |
| > 7 | Infrastructure and works              | 0,00              | 0,00                        | 0,00                  | 0,00               | 0,00 %            | 0,00                    |
|     | <b>Current report revenue</b>         | <b>0,00</b>       | <b>0,00</b>                 | <b>0,00</b>           | <b>0,00</b>        |                   | <b>0,00</b>             |
|     | <b>Total</b>                          | <b>109 088,87</b> | <b>0,00</b>                 | <b>4 197,96</b>       | <b>4 197,96</b>    | <b>3,85 %</b>     | <b>104 890,91</b>       |

#### 14. Financial Progress

Under the Financial Progress tab, the financial progress of the project can be tracked; amounts are shown in EUR.

The **Planned Amount** column displays the budget values specified in the Project.

The **Previously Validated Amount** column shows the cumulative sums of the previously validated PRs.

The **Current Report Amount** is the amount reported in the given PR.

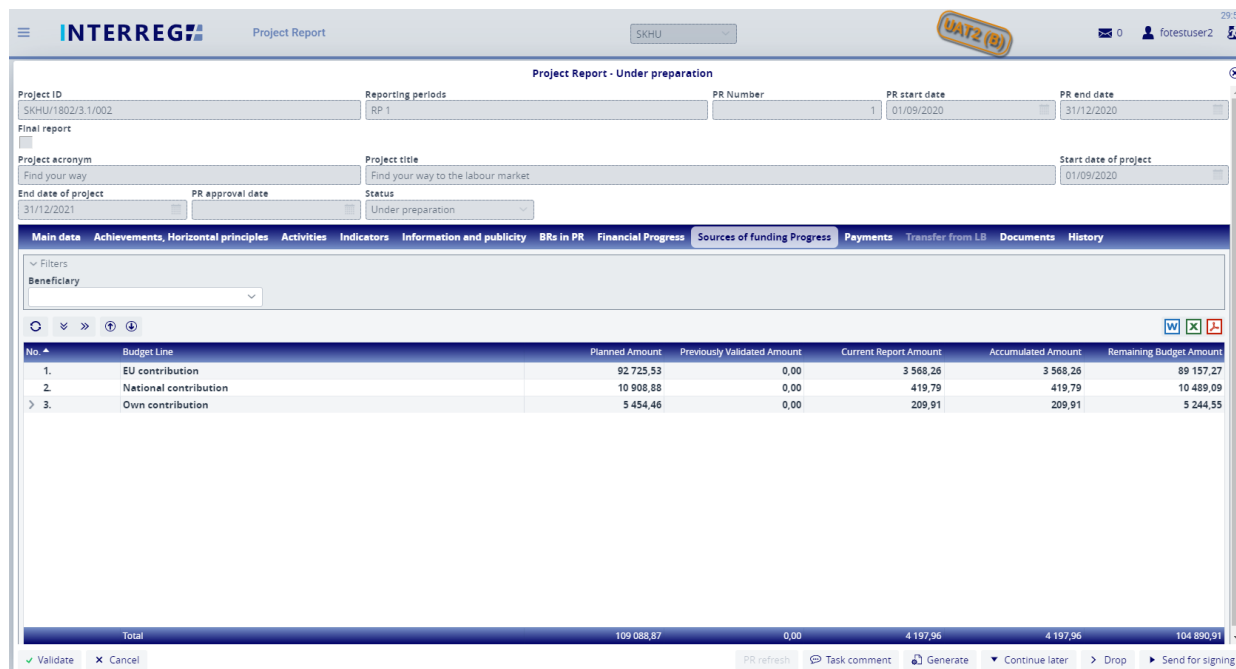
The **Accumulated Amount** is the sum of the Previously Validated Amount and the Current Reported Amount.

The **Remaining Budget Amount** is the difference of the *Planned amount* and the *Accumulated amount*, i.e. the amount, which is not yet accounted for.

In the *Filters* section, data can be filtered by Beneficiary included in the respective PR. If no Beneficiary is selected in the drop-down menu, the table shows the total budget of the project. If the filter is filled, only the budget of the respective Beneficiary is shown in the table.

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### 3.1.9 Sources of Funding Progress



| No.          | Budget Line           | Planned Amount    | Previously Validated Amount | Current Report Amount | Accumulated Amount | Remaining Budget Amount |
|--------------|-----------------------|-------------------|-----------------------------|-----------------------|--------------------|-------------------------|
| 1.           | EU contribution       | 92 725,53         | 0,00                        | 3 568,26              | 3 568,26           | 89 157,27               |
| 2.           | National contribution | 10 908,88         | 0,00                        | 419,79                | 419,79             | 10 489,09               |
| 3.           | Own contribution      | 5 454,46          | 0,00                        | 209,91                | 209,91             | 5 244,55                |
| <b>Total</b> |                       | <b>109 088,87</b> | <b>0,00</b>                 | <b>4 197,96</b>       | <b>4 197,96</b>    | <b>104 890,91</b>       |

15. Sources of Funding Progress

In the Sources of Funding tab, the financial progress of the project is shown sorted by the sources of the fundings.

The **Planned Amount** column displays the budget values specified in the Project.

The **Previously Validated Amount** column shows the cumulative sums of the previously validated PRs.

The **Current Report Amount** is the amount reported in the given PR.

The **Accumulated Amount** is the sum of the Previously Validated Amount and the Current Reported Amount.

The **Remaining Budget Amount** is the difference of the *Planned amount* and the *Accumulated amount*, i.e. the amount, which is not yet accounted for.

In the *Filters* section, data can be filtered by Beneficiary included in the respective PR. If no Beneficiary is selected in the drop-down menu, the table shows the total budget of the project. If the filter is filled, only the budget of the respective Beneficiary is shown in the table.

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### 3.1.10 Payments

| Project part         | Planned Amount | Previously validated EU contribution | EU contribution validated in current BR | Transferable EU contribution in current BR |
|----------------------|----------------|--------------------------------------|---|--|
| SKHU/1802/3.1/002/LB | 92 725,53      | 0,00                                 | 3 568,26                                | 3 568,26                                   |
|                      | 92 725,53      | 0,00                                 | 3 568,26                                | 3 568,26                                   |

16. Payments

Under the Payments tab, the transferable amounts of the EU contribution can be seen.

### 3.1.11 Transfer from LB

| Project part ID      | PR number | Total contracted (base) EU amount (EUR) | Transferred amount (EUR) | Transferable decision | Date of transaction |
|----------------------|-----------|---|--------------------------|-----------------------|---------------------|
| SKHU/1802/3.1/009/LB | 1         | 1 835 716,10                            | 0,00                     | 28/06/2021            |                     |

17. Transfer from LB

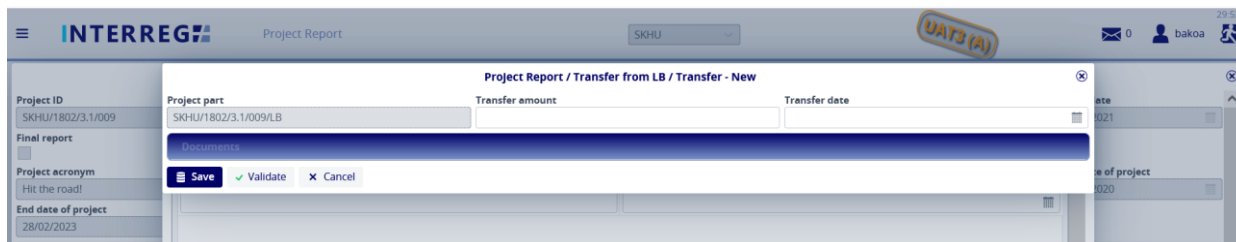
Under the tab, the system lists the EU contribution amount sorted by Beneficiaries based on the BRs in the previously approved PR; i.e. in PR2 the list contains all BRs of PR1 and the financial details of them. In this section the user can record the fact of LB transferring the UE subsidy further for all Beneficiaries included in the previous PR.

By selecting an entry from the list, the 'Transfers' ( ) button activates. By this button, in the pop-in window, the transferred amount in regard with the respective Beneficiary, and the supporting document(s) can be recorded by the 'Add' (+) button.

| Project part         | Transferable amount | Transfer date |
|----------------------|---------------------|---------------|
| SKHU/1802/3.1/009/LB | 0,00                |               |

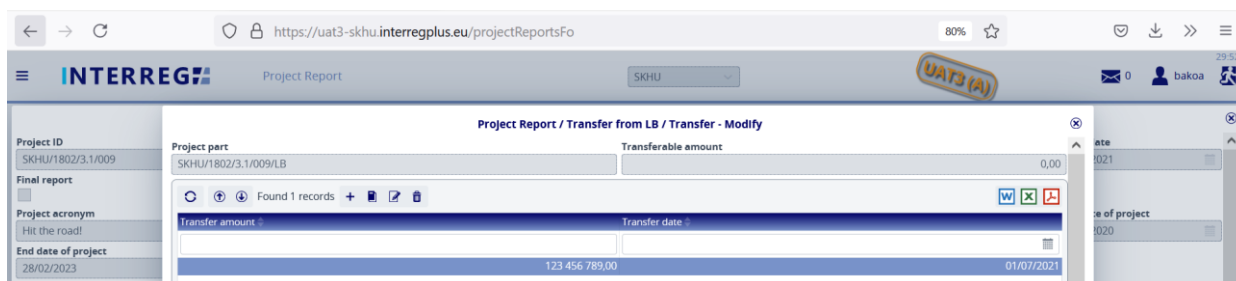
## PROJECT REPORT - USER MANUAL FOR FRONT OFFICE

### 18.a Transfer from LB - Modify



### 18.b Transfer from LB – recording the transfer data

After providing the transferred amount and the transfer date, save the data, and the record is created.

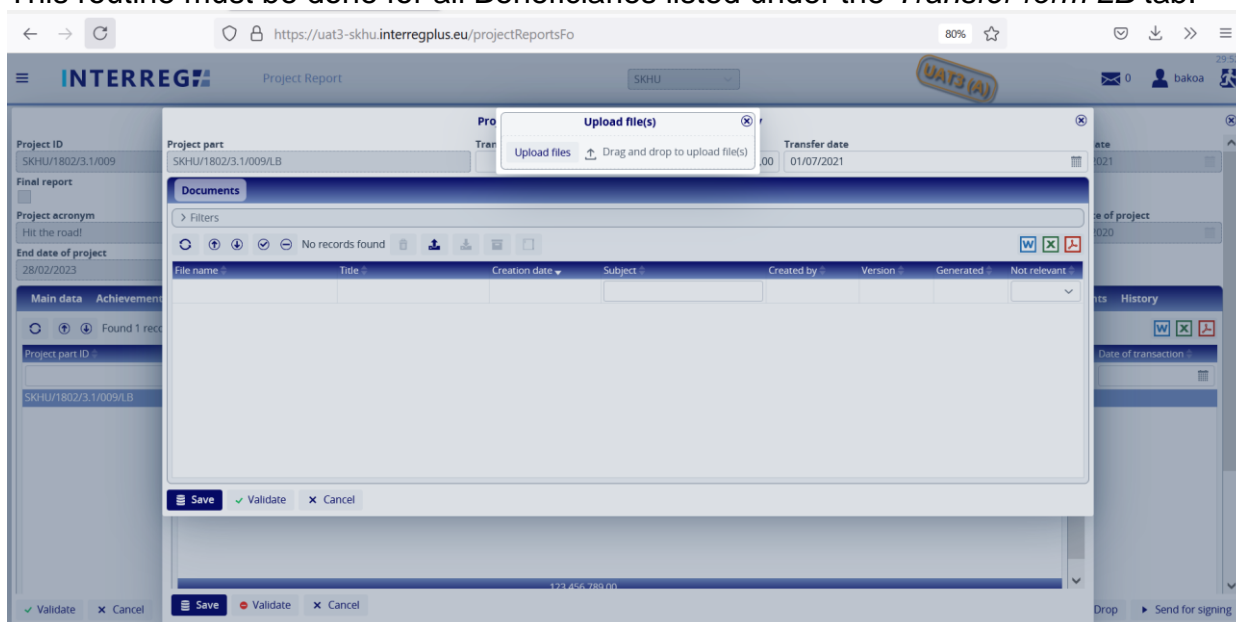


### 19. Transfer from LB – newly created transfer record

Once the record is created, a supporting document must be uploaded by clicking on the 'Modify' button; the upload is done as described earlier.

Once the supporting document is uploaded, the communication panel must be saved, as well as the pop-in window of the record.

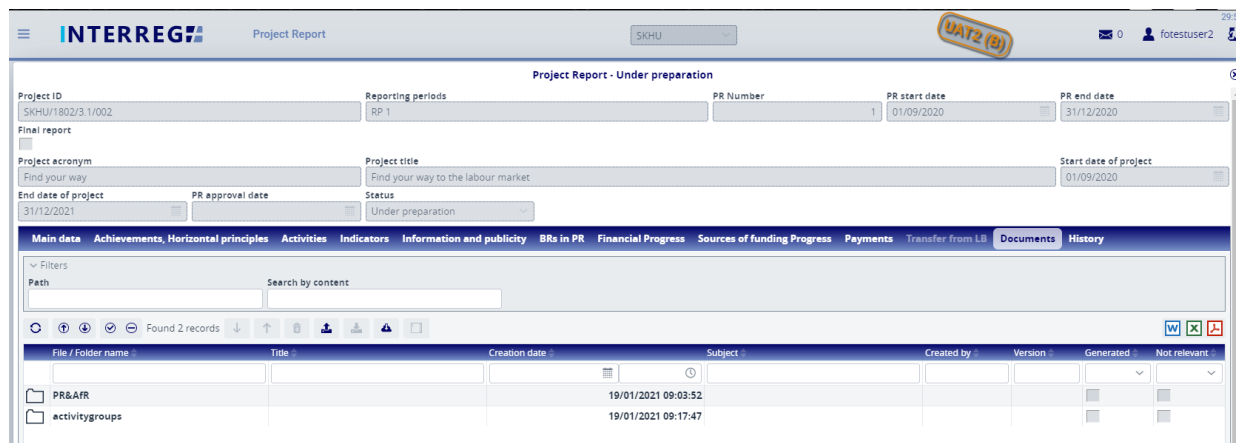
This routine must be done for all Beneficiaries listed under the *Transfer form LB* tab.




### 20. Transfer from LB – uploading supporting document(s)

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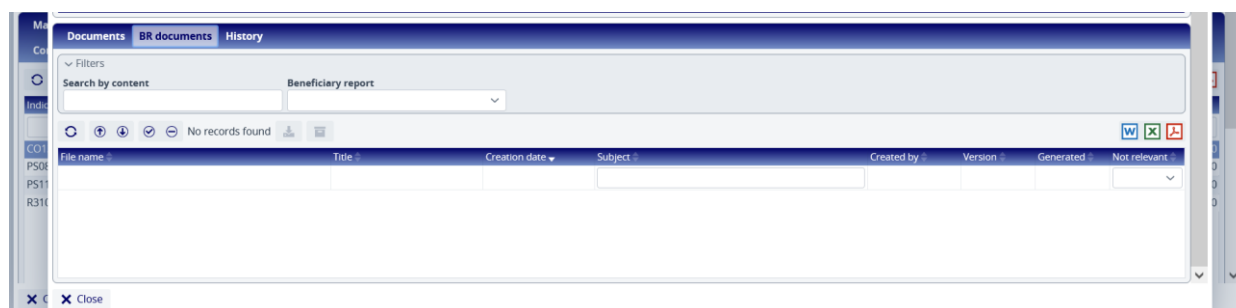
### 3.1.12 Documents



21. Documents

In the Documents tab, the supporting documents are arranged and can be viewed in a structured way automatically created by the system at the time of uploading a document on a specific sheet. E.g. when uploading a document under the 'Indicators' tab, the system automatically creates the 'indicators' folder and a sub-folder for the specific indicator, in which the document uploaded will be stored and shown on the Documents tab. Here the documents can be seen and edited: the subject, serving as a description for a document, can be specified and changed by clicking on the  (**Subject**) icon. Documents can be downloaded individually or grouped as a zip file. Uploading documents is also possible; please upload only documents of general nature, which are not corresponding to any specific sections (i.e. Activities, Indicators, etc.).

*Under the Activities, Indicator, and Info & Pub. tabs of the Project Report, accessing the individual entry, there is a BR Document subtab, where all documents uploaded for the BRs of the same entry is listed and can be seen (if any).*



22. BR Documents under Activities, Indicator, and Info & Pub. tabs

Supporting documents uploaded in the respective BRs can be find under the BR's Documents tab.

## PROJECT REPORT - USER MANUAL FOR FRONT OFFICE

### 3.1.13 History

The screenshot shows the 'Project Report - Under preparation' page in the INTERREG+ IT System. The 'History' tab is selected, displaying a table of task comments. The table has columns for 'Task comment', 'Task name', 'Start date', 'End date', and 'Assignee'. A single record is visible: 'Record PR data' with a start date of '19/01/2021 09:03:52' and assigned to 'fotestuser2'. The interface includes various navigation tabs at the top and bottom, and a search bar for task comments.

23. History

In the History tab, the certain actions of the Front Office Progress are listed with corresponding dates and timing.

### 3.1.14 Completion

The screenshot shows the 'Project Report - Need FO amendment' page in the INTERREG+ IT System. The 'Completion' tab is selected, displaying a table of completion documents. The table has columns for 'File name', 'Title', 'Creation date', 'Subject', 'Created by', 'Version', 'Generated', and 'Not relevant'. A single record is visible: 'Teszt rendszer.png' with a creation date of '19/01/2021 10:54:33' and created by 'iplustest'. The interface includes various navigation tabs at the top and bottom, and a search bar for completion documents.

24. Completion

Under the Completion tab the details of the Project Report completion is seen. Under its Documents subtab, the uploaded completion documents can be found and documents for completion can be uploaded. During completion, documents can be uploaded as usual, under each tab and each sheet. (e.g. Indicator, etc.) Under the Dates subtab, most importantly, the completion deadline can be found.

## PROJECT REPORT - USER MANUAL FOR FRONT OFFICE

### 3.2 COMPLETION

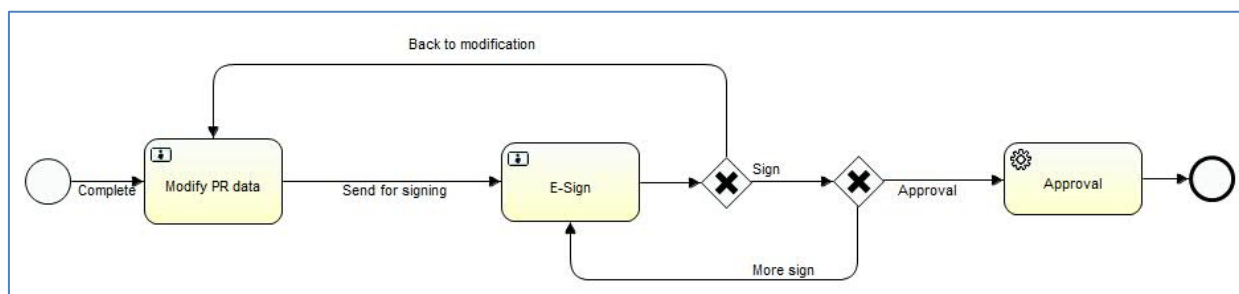
Once the Project Report is completed, the recording user can send it to the signatory user for e-signing by clicking on the **Send for signing** action button. The signatory user can only view the PR, editing is not allowed to them. If the signatory user finds the PR correct, it can be submitted by the **Sign** action button. *If there are more than one signatory users recorded for the project, then all of them need to complete this step.* With this action, the PR is submitted and it lands for approval at the Back Office.

If (any of) the signatory user decides that the PR is not fully complete, they can send it back for further editing by the **Back to modification** action button, in which case the **Task comment** field must be filled.



25. Action buttons of the Signatory User

Once the PR is submitted for approval, based on the decision of the responsible Programme Manager at the JS, the PR can be sent back for completion to the Front Office users. In such case, the PR returns from the Back Office with the status of “Need amendment”. In this case, the required modification can be done by the recording user and the submitting procedure must be repeated as described previously. The below figure explains the submission process in a visual manner.

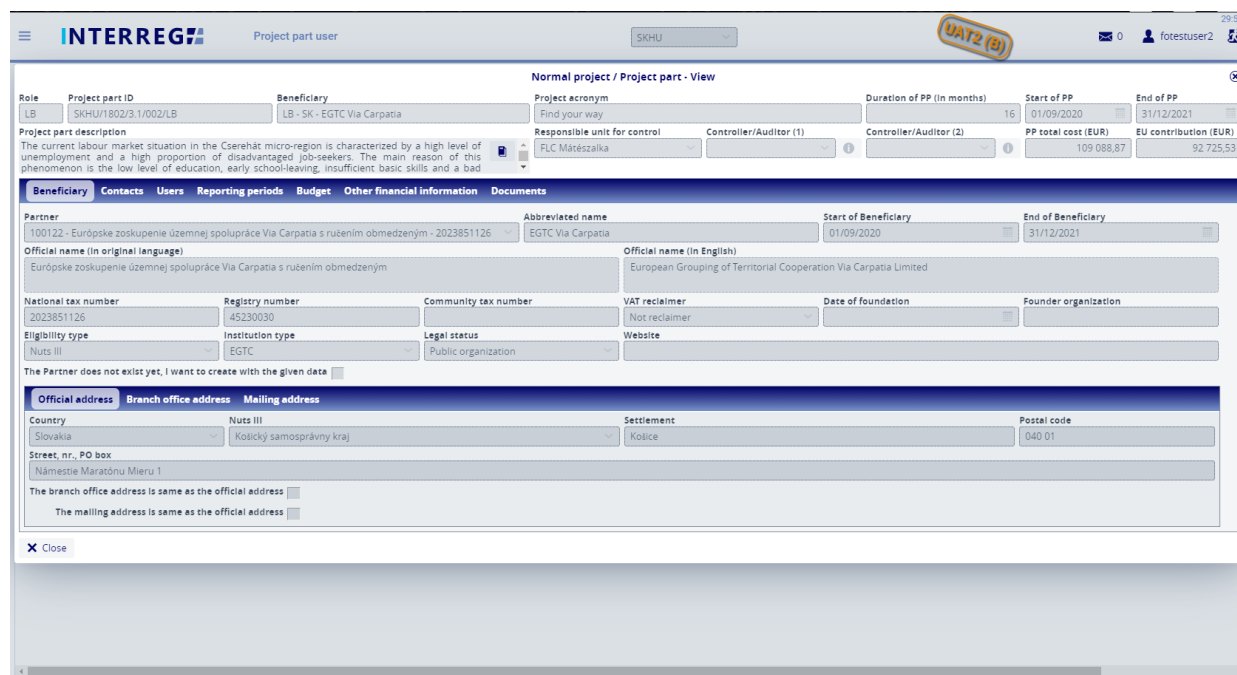


26. Completion workflow

## PROJECT REPORT - USER MANUAL FOR FRONT OFFICE

### 4. VIEWING THE PROJECT PART

The User can view the Project and Project Part they assigned to. The function is available through the Main Menu / Project data menu point. The Project and Project Part is available only for viewing; the User cannot edit, modify or delete any piece of data.



27. Project Part View

### 5. INTERREG+ TECHNICAL SUPPORT

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

*To support your case, please, provide a description of the problem with as much details as possible, and attach screenshots, of which the entire screen is visible, most importantly the date and time. Additionally, please provide the Project ID and the username.*