Hungary
Slovakia
Romania
Ukraine

User's Manual

for the application module IMIS 2014-2020

**for the applicants of the
Hungary-Slovakia-Romania-Ukraine ENI CBC Programme 2014-2020**

Table of contents

1 How to use the manual

The main objective of this user's manual is to provide guidelines on the use of the **IMIS 2014-2020 Monitoring and Information System** to the applicants of the **Hungary-Slovakia-Romania-Ukraine ENI CBC Programme 2014 - 2020.** The applications (as well as the annexes and the supporting documents) can only be submitted electronically via the **IMIS 2014-2020 Front Office Application** module. The application form does not need to be printed out; the annexes as well as the supporting documents of the application are available electronically and need to be filled in, signed (where indicated) and uploaded via the **Front Office** interface in order to be considered as an integral part of the application

The Manual:

- describes the mode of filing in and submitting the applications from the technical point of view, as well as
- provides practical and technical information on the entry of the data.

Prior to the starting your work, please:

- make sure that your computer meets the required technical specifications (see the chapter entitled Technical instructions);
- study all the chapters of this Manual and get familiar with the screen structures and the logics of the system.

When you are filling in the application form, please study the relevant chapters of the Manual.

2 Technical instructions

In this chapter you will find information on the required technical criteria, the general rules of use, as well as the conventions of using the fields and icons.

2.1 Technical criteria

Each user computer on which you wish to run the IMIS 2014-2020 Application Front Office has to meet the following technical criteria:

- Operating system: the use of a desktop operating system (e.g. Microsoft Windows) is recommended;
- Resolution: 1280*768 or higher;
- Web browser: recommended: Mozilla Firefox 46.0.1 or later version, Google Chrome 50.0 or later version, Internet Explorer 11.0 or later version;
- Enabling cookies in the browser;
- PDF reader (e.g. Adobe Reader);
- Document manager (e.g. Microsoft Office) for opening DOC files;
- Internet connection.

2.2 General rules of use

- The IMIS 2014-2020 is an internet application, which means that any disruption in the internet connection may interrupt the communication between the server and the user
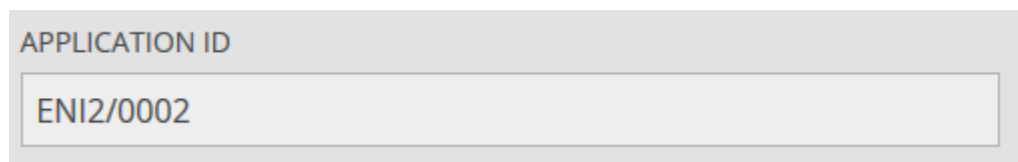
computers. If this happens, the screen will go gray, and the system will display the following message: *"Server connection lost, trying to reconnect…",* the work process can be continued after the connection has been restored, except if the session expires. In this case, you will have to log into the system repeatedly.

- If you are inactive for longer than 60 minutes (there are no data entries or clicks, etc.), the system will automatically terminate the connection between the user and the server computers for security reasons and will send you the following error message: "Session expired…", then will disconnect. Push the **Esc** button and re-log.

- In the application process the Lead Applicant will be the intermediary for all communications between the Managing Authority/Joint Technical Secretariat and the other applicants. As such, it is the LA who is to fill in the content of the application via IMIS. From the technical point of view, please note that it is only one applicant that can work on an application at one time, so please avoid parallel use (e.g. when one person is entering the financial data, while the other one is simultaneously entering the textual parts). Parallel use may lead to disruptions and may cause data loss in the system.

- Please also be aware that only one account per project/ applicant is required; if one applicant/ LA submits more than one application he/she can use a singular IMIS account, so there is no need to generate/ create new one. There is still the possibility that a LA has more than one IMIS users, but in this case a centralized view of all the applications the LA is developing/ is part of will not be available.

2.3   Conventions of using the fields

The system applies several types of fields which may have specific characteristic features and which require different modes of use.

- **Fields with a gray background** – read-only fields, they mostly display the values automatically uploaded by the system, or some data entered by the applicant on other panels may also be displayed in these fields;
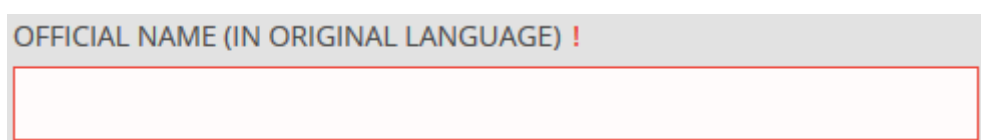
APPLICATION ID

ENI2/0002

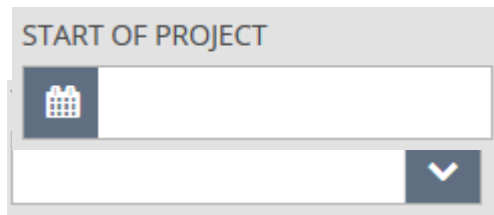- **Fields with a white background** - normal entry fields;

WEBSITE

- **Fields with a white background, in a red frame**– the operation is similar to that of the normal entry fields, the only difference being that it should be filled in by the user with a mandatory effect. Those fields in which the user enters data different from those required
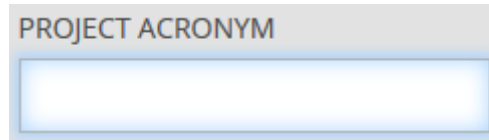
OFFICIAL NAME (IN ORIGINAL LANGUAGE) !

will also appear in a red frame. In such a case, the validation message for the field will appear in a tooltip if the mouse is moved over the field;

- **Scroll-down fields** – these fields can be uploaded from a predefined value set, the fields can be scrolled down by clicking on the arrows and filled in by clicking on one of the values that appear;

- **Date fields** – in these fields the dates can be typed according to the accepted format (day/month/year), or the date in question can be selected by clicking on the calendar icon;

- The data fields that open if you click on a field are those that can be filled in in a new data sheet, those which receive a blue frame if the mouse is moved over them, and a pop-up data

sheet for the completion of the fields is displayed if you click on them.

3   How to access the IMIS 2014-2020 Front Office

The applications should be compiled and submitted by relying on the Front Office module of the IMIS 2014-2020 Monitoring and Information System.

The following rules will apply to the use of the module:

- Via the link HU_IMIS_2014-2020_ENI_APPLICATION, all the screens of the Front Office panel will appear in a web browser in English.
- The browser supported by the system is Mozilla Firefox.
- The same application shall not be uploaded at the same time, simultaneously, via several browser interfaces.
- No automatic backup saving is performed by the platforms of the module but a save option is available from all platforms.
- It is possible to interrupt the application submission process at any point (Save).

3.1   Log-in

- Please click on the link IMIS 2014-2020 for displaying the following screen.

- Please start registration by clicking on the Registration label. The following screen will appear then.

- Please provide a username and a valid e-mail address, as well as the control code (Captcha). After filling in the fields, please click on the **Registration** button. Then the system will send you an automatically generated certification and a password to the e-mail address that you have provided. It may take as many as 5-10 minutes to receive the notification.

- When the registration e-mail reaches your mailbox, you will have to download the certification required for accessing the page on the link specified in the letter. You can find the detailed information required for the installation of the downloaded certificate in your browser in the link provided via e-mail as well as described in the following steps below:

1. Click on the „Download button":
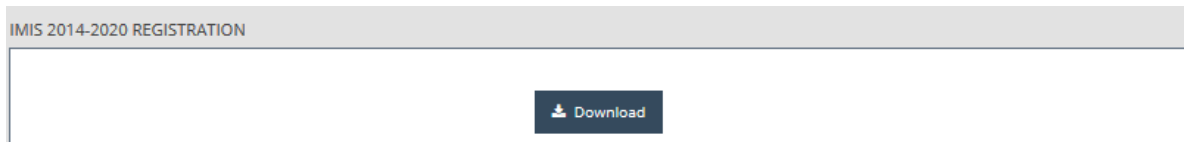
2. Open the downloaded certificate with double clicking and install it with wizard;

3. Enter your Certificate Password (from the registration email) (please do not use the user password but the certificate password as indicated in the e-mail);

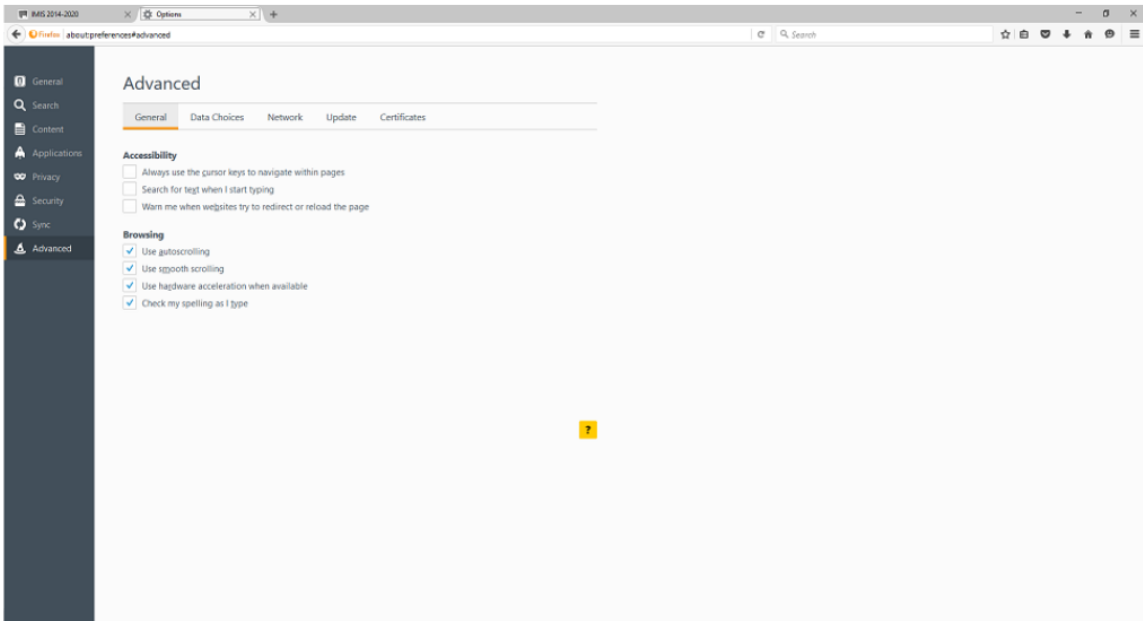4. Install the downloaded certificate in your browser

- Start Firefox web browser (this guide is for 44.0.2 version)
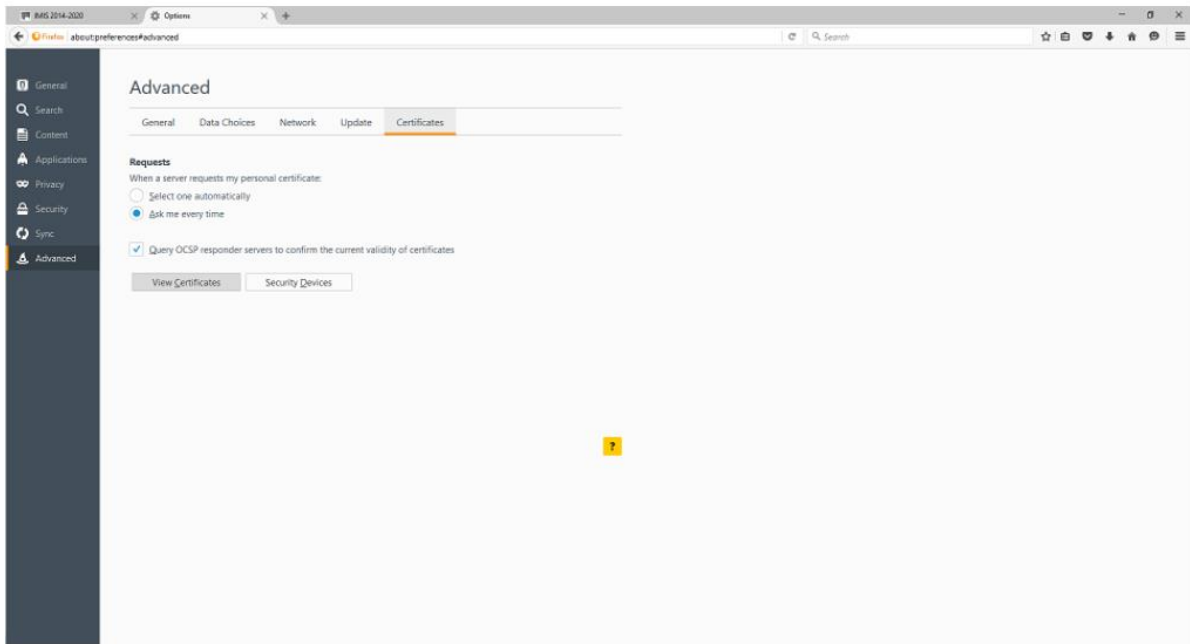- Open menu (top right):
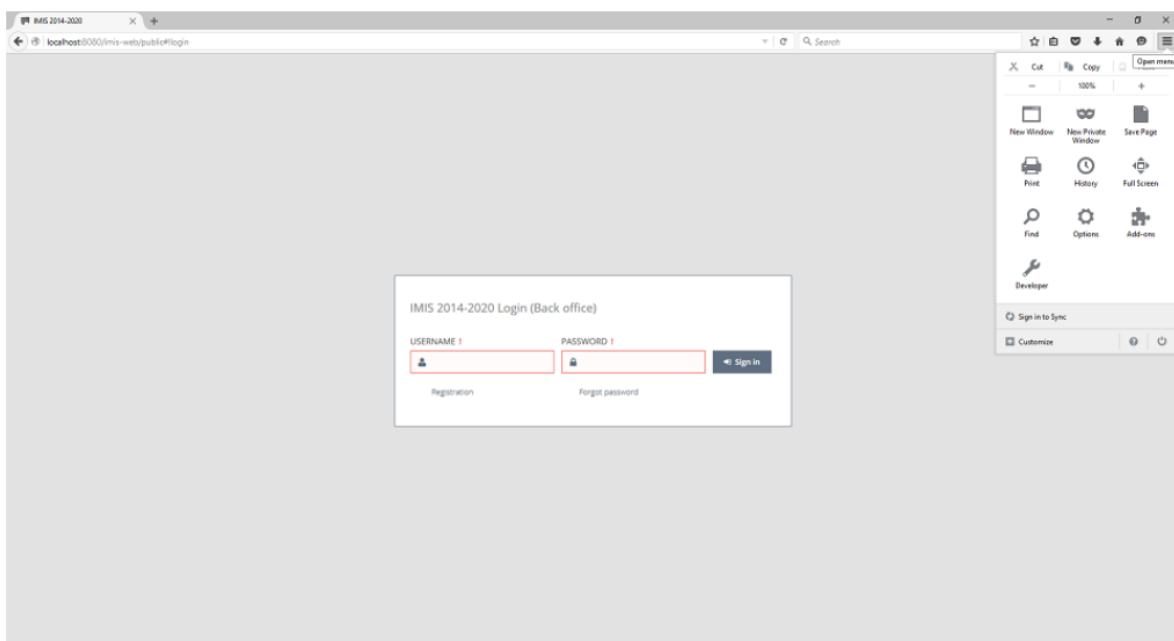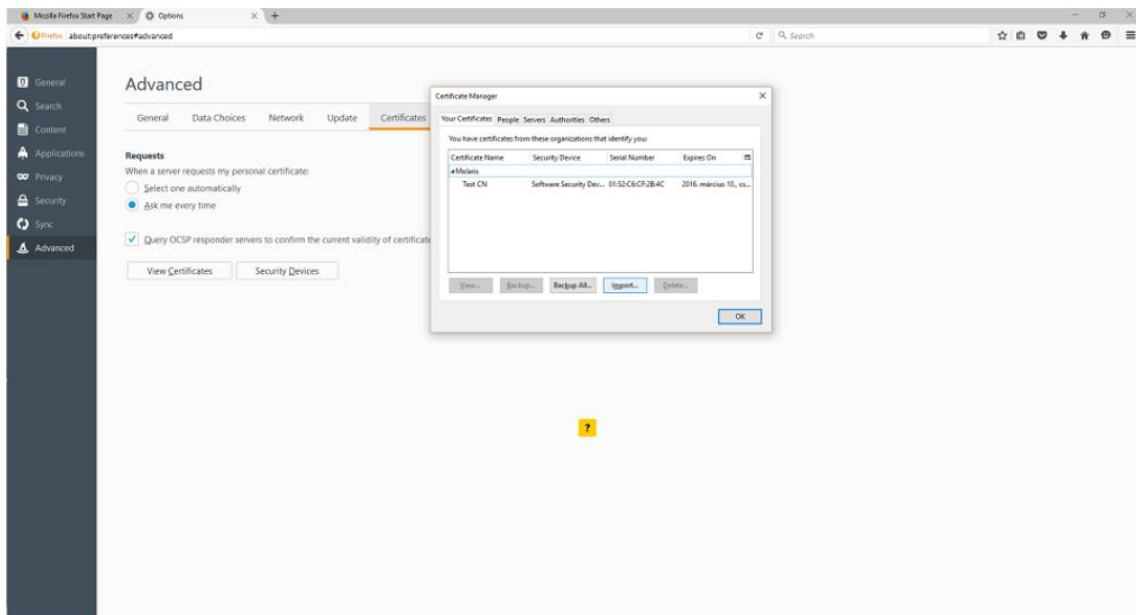

- Choose Settings Menu ("gear" icon)
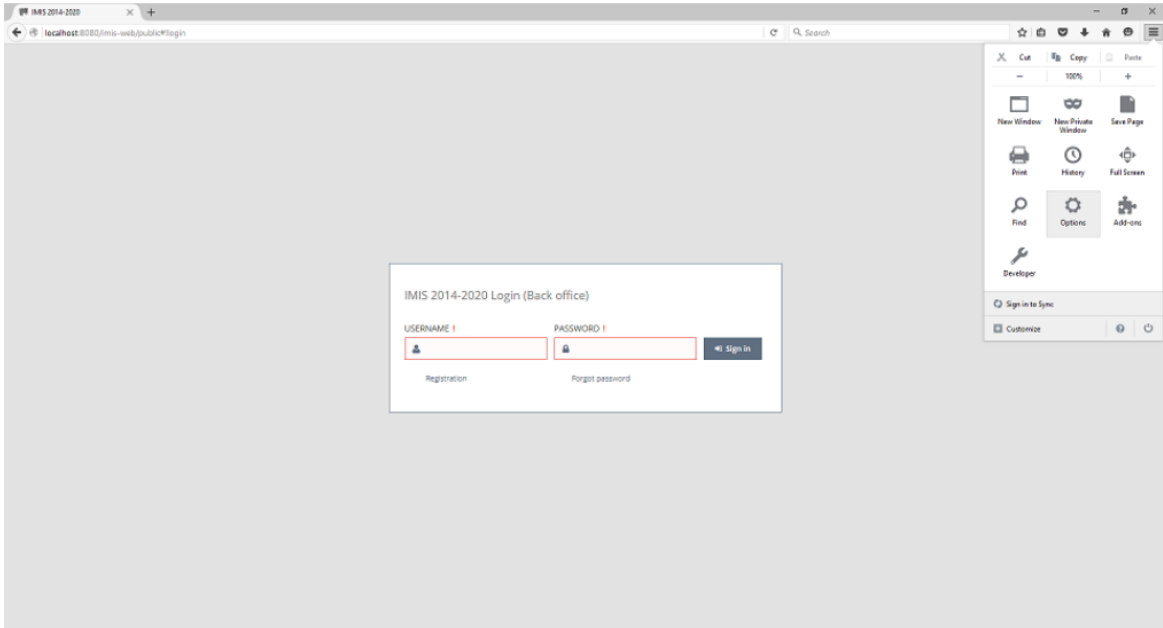
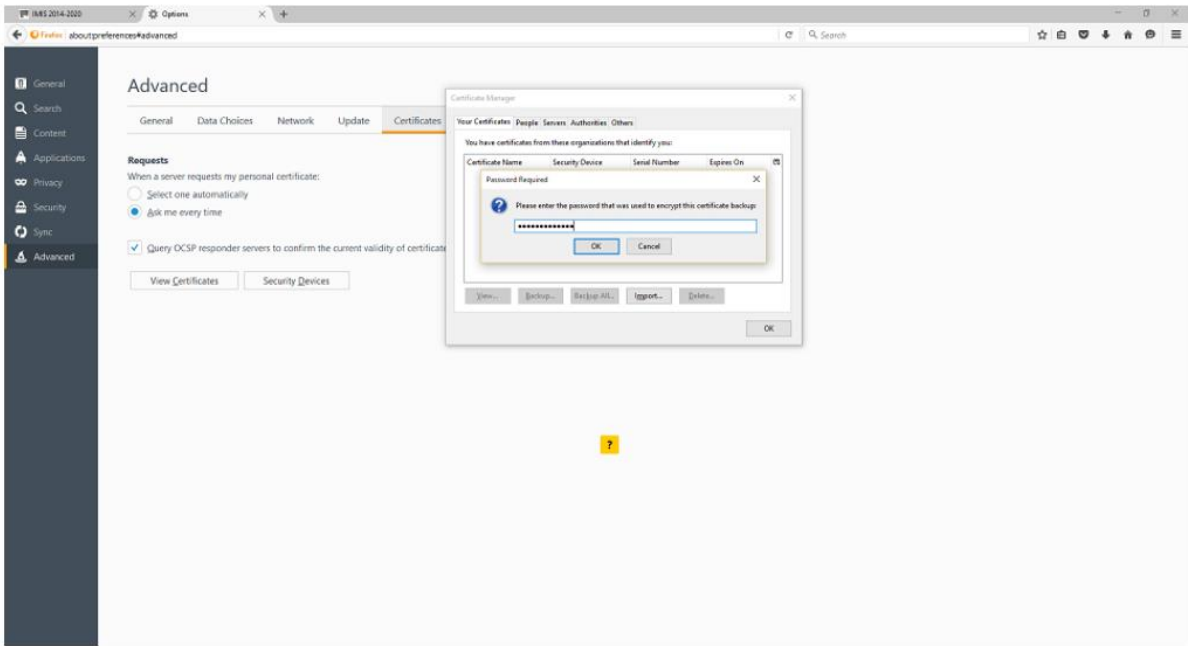- Choose Advanced in side sub-menu ("wizard hat" icon)

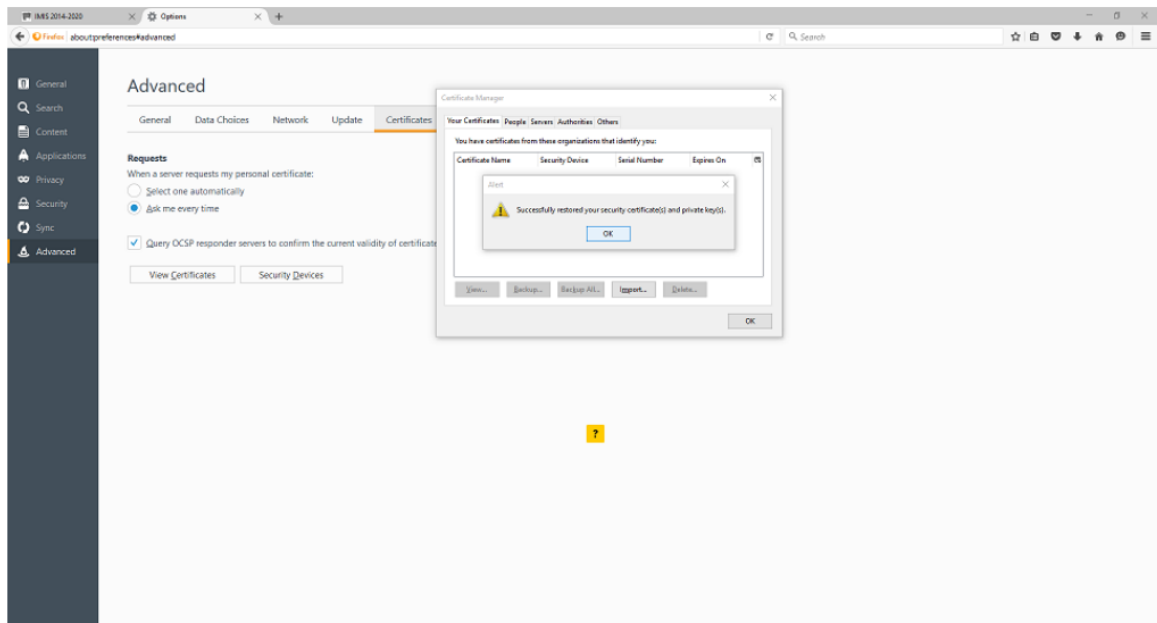- Press Certificates button on the Certificates tab:
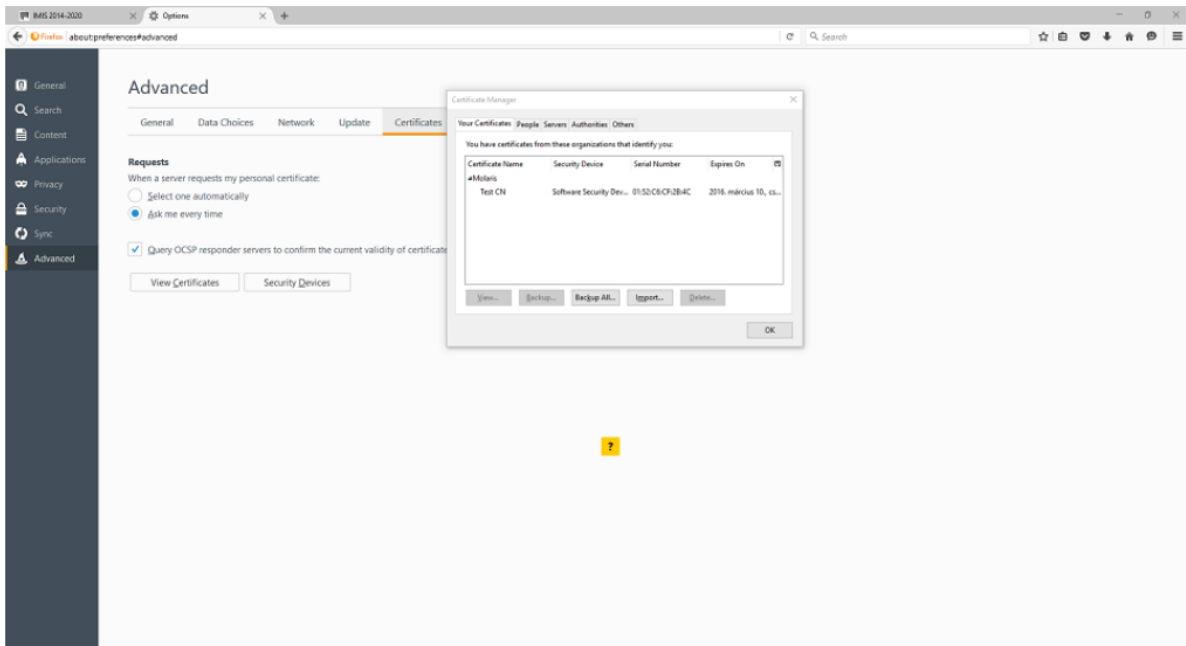
- Press Import button on the Your Certificates tab:

- Choose and open your Certificate from the files window:

- Enter your Certificate Password (from the registration email), then press OK
- You'll get an approval from your web browser, press OK

- You'll see the obtained certificate in the list:

5. After pressing OK, RESTART your browser and login to the system on the following link: https://imis2014-2020.eu/imis-web/public#!foAppEniLogin

a. After the certification has been successfully installed, you can sign in to the IMIS login screen by entering the username and the temporary password. Please push the **Sign in** button for this. Please, note: the password is only valid for a limited time, you should log in within 2 hours. If more than 2 hours have passed since the e-mail was received, you should request a new temporary password.

b. After you have logged in, you should change your password (please enter the temporary password generated by the system again, then enter the new password that you have chosen twice). You should select a new password that has at **least 8 characters and contains lower and upper case letters, as well as numbers**. The password shall not contain the username. You will be free to change this password at any time later, under the menu point *Change Password* on the opening screen of the Front Office.

c. Should you forget your password, please, use the button **Forgot password** on the IMIS login screen. Then the system will send a new temporary password to your e-mail address. For this, only your username and the control code should be provided.

Please, provide your username.

USERNAME !

[   ]

zyxr2

[   ] ! ⟳

✈ Send my password   ⊘ Cancel

d. If you wish to change your e-mail address provided at the time of registration, please use the menu point *Change e-mail*. The appearing screen will display the current address and you can provide the new e-mail address.

PROFILE ❯   💾 Save

E-MAIL   HISTORY

OLD EMAIL   NEW EMAIL !   NEW EMAIL AGAIN !

test@test.test   [   ]   [   ]

3.2   Menu

After a successful login, the Front Office platform will open:

Version: 1.0.84 User: MSILLOTESTFRONT ❓ ➡

MAIN PAGE ❯

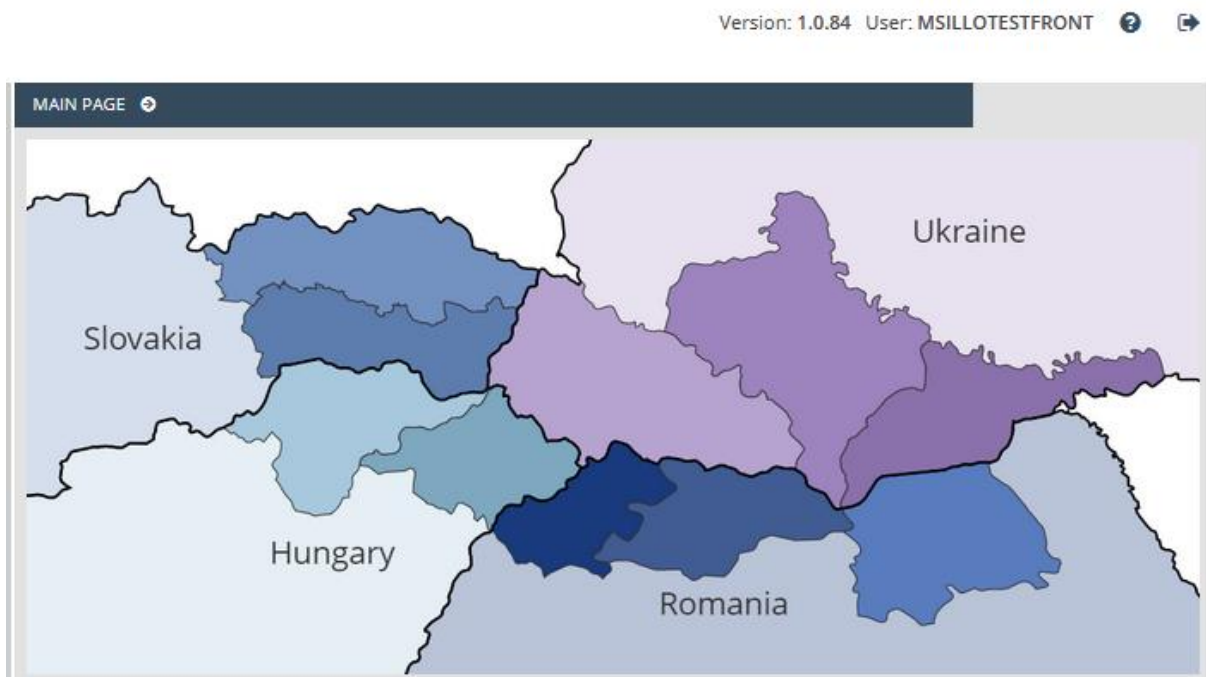The menu points on the left-hand side of the screen will be organized in two distinct sections:

- **Application** – a new application can be launched from this section, an application that was uploaded or started earlier can be retrieved, and further interactions related to the application can be launched from here as well.
  - ◦ **New** – you can start compiling the new application here. Any time that you click on the menu point New, the system will generate a new application. Please, always check whether or not you have an application that has already been launched, under the menu point Search.
  - ◦ **Search** – you can view all your applications here. All the applications are listed, irrespective of their current status: including those which have already been submitted but not adopted, those which have been adopted or rejected, as well as those which are still being prepared, or those which have been returned for modification.
- **Personal Settings** – the modification of the login data of the user can be launched from this section
  - ◦ **Change password** – the change password screen will appear if you click on this menu point.

Change e-mail – if you click on the menu point, the screen for changing the e-mail will appear. By clicking on the small arrow preceding the section names, the sections can be closed or opened. By clicking on the vertical gray line on the right-hand side of the menu bar, the menu bar can disappear, while it can be made to reappear by clicking on it again, so the content area can be enlarged if necessary. By clicking on the icon 🔵 in the upper right-hand corner of the screen, you can access the English version of the user's manual, while by clicking on the icon ➡️, the user may log out of the system after confirmation.

4 How to prepare the application

Please, click on the menu point **New** of the section *Application* to launch the new application. The system will display the screen **New** application. At the top of the screen, a scroll-down Information reminder panel contains the details of the cooperation program.

In the scroll-down field called *Call for Proposals Name*, select the call for proposals for which you wish to apply. Then select the thematic objective in the *Thematic objective* field, then the priority in the *Priority* field, i.e. to indicate the priority that you wish to submit an application for. Please, study the document called "Guidelines for Application" to be able to make a correct choice of fields. After filling in the fields, the generation of the application can be launched by clicking on the **Start** button in the upper right-hand corner, and the generation of the application can be interrupted by clicking on the **Cancel** button.

4.1   General Data tab

You can provide the key information of the application in this platform. The Information reminder dropdown menu displays the application ID and the characteristic feature of the Project acronym.

In the pop-up window that appears when you click on the *Project title* or *Project acronym* fields, please provide the Project title and Project acronym features. The project title should be informative but short. For this you have 200 characters (space characters included), while the Project Acronym cannot be any longer than 30 characters (space characters included). This will be used for the identification of the project later. Save the data by clicking on the **Save** button.

Please, set the duration of the project in the pop-up window that appears by clicking on the **Define** button. Please provide the start date in the field called Start of project (if you would like to select the date, please, click on the icon), then provide the end date of the project in the field called **End of project**. Then the *Duration* (in months) will be automatically calculated, which expresses the duration of the project in months. Save the data by clicking on the **Save** button. Indicating a possible start date and end date is obligatory to receive the planned duration of the project. The theoretical dates will not have any affect on the real start date to be defined in the Grant Contract of a winner project.

Please select the type of the project and the nature of the application in the bottom section *of Main data*, and provide a comprehensive description of the application ina maximum 2000 characters (space characters included) as described in the guidelines for applicants.

4.2   Applicants tab

You can manage the administration of the applicants on the panel with the following options:

- **View** - viewing the data of an existing applicant.
- **New** – adding a new applicant.
- **Modify** – modifying an existing applicant.
- **Delete** – deleting an existing applicant.
- **Order** – setting the order of the existing applicants.

The hit list of the panel is empty by default, please, start your work from providing the data of the partners. For this, click on the **New** button, as a result of which the default data sheet of the applicant will appear with the *Applicant data* tab.

Fields on the applicant's data displayed on the panel:

- **Applicant ID** – the applicant's identification, which is generated by the system and which cannot be modified;
- **Role in partnership** – type of applicant, which is automatically generated by the system (can be modified later with the Order function).
- **Official name (in original language)** – please enter the official name of the applicant in its own language. It can be a maximum 200 characters.
- **Official name (in English if exists)** – please enter the official name of the applicant in English. It can be a maximum 200 characters again. In case the applicant does not have an official

English name, please translate as accurate as possible the name of the organization from the national language.

- **Abbreviated name** – please generate and provide the abbreviated name of the applicant, the maximum length of which may be 20 characters. This abbreviated name will then be used for quick and easy identification.
- **Country** – please select one from the countries appearing in the scroll-down list.
- **National tax number** – please enter the tax number of the applicant.
- **Registry number** – please enter the registry number of the applicant.
- **Community tax number** – please enter the community tax number of the applicant. This field can be completed optionally.
- **Legal status** – please select one of the options appearing in the scroll-down list.
- **Date of foundation** – please provide or select the date when the applicant was established.

  If you would like to select the date, click on the [calendar icon] icon.
- **Founder organization** – please enter the name of the founding organization. This field can be filled in optionally.
- **Website** – please enter the webpage of the partner. This field can be filled in optionally.
- **VAT reclaimer** – please select one from the options appearing in the scrolldown list.

The fields of the *Official address* data of the applicant that appear on the panel:

- **Eligibility** – please select one of the values appearing in the scroll-down list, which identifies whether the eligibility of the application refers to a classified region or a city. If a *City* value is chosen, the value should be selected in the *Eligible City* field, and the Settlement field cannot be edited in this case.
- **Nuts III or equivalent** – please choose one from the regions appearing in the scroll-down list
- **Postal code** – please enter the postal code.
- **Settlement** – please enter the name of the settlement if you have selected the NUTS III value in the Eligibility field.
- **Eligible city** – please select one of the cities appearing in the scroll-down list if you have chosen the value City in the Eligibility field.
- **Street** – please enter the name of the street.
- **Number** – please enter the house number.
- **PO box** – please enter the PO box.

The *Mailing Address* section can be regulated with a checkbox, which is ticked by default. Please leave the checkbox *Please tick if the mailing address is the same as the official address!* checked if the correspondence address is the same as the Official Address. In the contrary case, the fields necessary for capturing the address data will appear for completion.

After the regular completion of the fields appearing on the *Applicant data* tab, click on the tabs Legal rep. and Contact person. You can provide the data of the legal representative and the contact person on this panel.

The following fields will appear for filling in:

- **Title** – please select one from the items that appear in the scroll-down menu.
- **First name** – please enter the first name of the representative.
- **Middle name** – please enter the middle name of the representative.
- **Last (family) name** - please enter the last (family) name of the representative.
- **Suffix** – please enter the suffix of the name of the representative.
- **Name** – the system combines the full name in the *Name* field on the basis of the data that are provided.
- **Phone number** – please enter the phone number of the representative.

- **Mobile phone number** – please enter the mobile number of the representative.
- **E-mail address** – please enter the e-mail address of the representative.
- **Position** – please enter the position of the representative.

Please check the checkbox "**Please tick if the contact person is the same as the legal representative!**" if the contact person is equivalent to the legal representative. In the contrary case, the above-listed fields will appear for completion in the *Contact person* section.

Please note that in the case of the Lead applicant, it is mandatory to provide the mobile number of the contact person.

After the regular filling in of the fields appearing in the tabs Legal rep. and Contact person, please click on the **Save** button, then after saving, on the *Experience* tab. The data on the applicant's earlier project management experience can be provided on this panel optionally, with the following options:

- **New** – generation of a new element
- **Modify** – modification of an existing element
- **Delete** – deletion of an existing element
- **View** – viewing the data of an existing element

The hit list of the panel is empty by default, please start work by entering the data on experience. For this filed to be filled in, please click on the **New** button.

As a result, the experience data sheet will appear with the following fields:

- **Name of the program** – please enter the name of the program – max. 70 characters.
- **Project title** – please enter the title of the project – max. 70 characters.
- **Sector** – please enter which sector the project is involved in – max. 70 characters.
- **Location of the project** – please enter the location of the project – max. 70 characters.
- **Total budget of project (EUR)** – please enter the total budget of the project expressed in euros.
- **Managed budget** – please enter the costs managed by the applicant within the total project budget.
- **Role in project** – please enter your role in the project.
- **Project duration** – please enter the project duration expressed in months.
- **Short description of the project** – please enter the short description of the project – max. 500 characters.

By clicking on the **Save** button, you can save the experience, while generation can be interrupted by clicking on the **Cancel** button. If you wish to add several **Experience** elements to the applicant, please, repeat the above steps.

If you have provided all information for the applicant, you can save the data by clicking on the **Save** button, which will thus appear in the hit list of the *Applicants* tab.

By ticking one single element of the hit list, then clicking on the **Modify** button, the data of fhe applicant in question may be modified, while by clicking on the **View** button, the data can be viewed, and after confirmation, the applicant may be deleted by clicking on the **Delete** button.

If you would like to enter several applicants for the application, please repeat the steps described above. If you reach the maximum number of applicants that can be entered (9), the system will warn you that you cannot enter any more applicants for the application in question.

If you enter several applicants for the application, it will become possible to set an order among them on the panel that will scroll down by clicking on the **Order** button.

4.3   Location of project impact tab

The locations of the projects concerned by the application can be managed on the panel with the following options:

- **New** – generation of a new location.
- **Modify** – modification of an existing location.
- **Delete** – deletion of an existing location.
- **View** – viewing the data of the existing location.
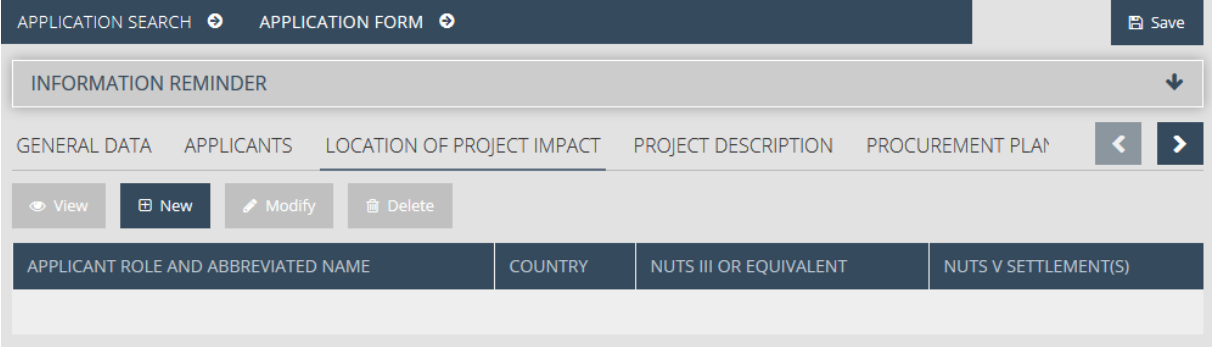
The hit list of the panel is empty by default, please start work by entering the new location. For this, click on the **New** button. As a result, the data sheet of the project location will appear with the following fields:

- **Applicant Abbreviated Name** – please select one of the applicants entered earlier appearing in the scroll-down list.
- **Role** – a field completed by the system, with the classification of the selected applicant.
- **Country** – please select one of the countries that appear in the scroll-down list.
- **Nuts III or Equivalent** – please select one of the regions that appear in the scroll-down list.
- **Other** – a checkbox by ticking which no values can be selected in the fields Country and Nuts III or Equivalent, you can only enter values in the Nuts V Settlement(s) field.
- **Nuts V Settlement(s)** – please enter the settlement(s) concerned by the project.

After regularly completing the fields appearing in the data sheet, please save the data that you have entered by clicking on the **Save** button, while by using the **Cancel** button, the data entry can be interrupted and you can return to the previous panel. Based on the above steps, please enter all the required project locations.

By designating one element from the hit list of the *Location* of project impact tab, then clicking on the **Modify** button, it will become possible to modify the element in question, while by deleting on the **Delete** button, to delete the location after confirmation, and by clicking on the **View** button, to view the data.

4.4 Partnership tab

On the panel, you can provide the descriptions for the different partnerships that belong to the application, with the following options:

- **Modify** – modification of the description of the partnership in question.

For providing the description, select a criterion, then click on the **Modify** button. As a result, the data sheet of the description will appear with the following fields:

- **Key Aspect** – the upper field is completed by the system, please, enter the description in the field below.
- **Guide** – a field completed by the system, guidelines for correct fillin in.

By clicking on the **Save** button, please save the data that you have entered, while with the button **Cancel**, you can interrupt the data entry and you can return to the previous panel. Based on the above steps, please enter the descriptions of the partnerships for all criteria.

4.5   Project description tab

In the panel, you can provide the description of the project, by the individual criteria, with the following options:

- **Modify** – modification of the description that belongs to the criterion in question.

Select a criterion for providing the description, then click on the **Modify** button. As a result, the data sheet of the description will appear with the following fields:

- **Key Aspect** – the upper field is completed by the system, please, enter the description in the field below it.
- **Guide** – a field completed by the system, guidelines for correct completion.

Please read the related guidelines of the respective sections.

By clicking on the **Save** button, save the data that you have entered, while by clicking on the **Cancel** button, you can interrupt data entry and can return to the previous panel. Based on the above steps, please enter the descriptions for all the criteria.

4.6   Logical framework matrix tab

On the panel the responses of the applicant to the questions predefined by the columns and rows in the matrix can immediately be entered into the table.

APPLICATION FORM ⊘				🖺 Save

INFORMATION REMINDER   ↓

LOCATION OF PROJECT IMPACT   PARTNERSHIP   PROJECT DESCRIPTION   **LOGICAL FRAMEWORK MATRIX**   IND   `<` `>`

5. LOGFRAME

GUIDE

Please fill in the logical frame matrix. Before filling it in, revise the relevant section 2.7.1 in the Guideline for the definitions of outputs, results and impacts. Please be aware that the results, outputs and Activities Groups will be detailed in section 4. Work Plan.
In case some of the cells are not relevant for your application, please insert 'n.r.' into the cell.
Max 500 characters/cell.

	Intervention logic	Indicators	Sources and means of verification	Assumptions (What other conditions must exist?)
Overall objectives	What are the problems and needs	What are the key indicators related to	What are the sources of information for	What are other external factors
Specific objectives	What are the specific objectives the Project	Which indicators show that the	What are the sources of information that	Which factors and conditions outside the
Expected results	What are the expected results?	What are the indicators to measure	What are the sources of information for	What external conditions must be
				Validation error! Must be filled!
Activity Group 1 Activity 1,2,3,4,5	What are the key activities (2-3 main) to	What are the means required to	What are the sources of information about	What pre-conditions are required before
Activity Group 2 Activity 1,2,3,4,5	What are the key activities (2-3 main) to	What are the means required to	What are the sources of information about	What pre-conditions are required before
	What are the key activities (2-3 main) to	What are the means required to	What are the sources of information about	What pre-conditions are required before

Please fill in the questions of lines 4-9 on the panel which refer to the activity groups, please fill in these in line with the Activity Groups entered in the Work plan (Chapter 4.11). If an activity group of

a certain serial number is not relevant in your application, please, enter "Not relevant" for the elements of the line in question. Drag the margins of the table in order to make all the text of the requirements more visible.

4.7 Indicators tab

On this panel it is possible to enter and maintain the indicators required for the application.

The fields *Thematic objective* and *Priority* remind you of the selected application.

On the panel the program-level result and output indicators that can be selected for the priority in question appear in a table format.

The following options are available for the maintenance of the indicators:

- **New** – entering a new indicator.
- **Modify** – modification of an existing indicator.
- **Delete** – deletion of an existing indicator.
- **View** – viewing of an existing indicator.

PROGRAMME-LEVEL RESULT INDICATORS

GUIDE

Please provide a detailed list in the table below of the output and result indicators of the Project (the outputs are the products, goods and services which result from the Project's funded activities; the results are the immediate advantages of carrying out the activities). All projects shall select at least one pre-defined output and one pre-defined result indicator from sections 4.7 and 4.8 of the Joint Operational Programme

INDICATOR NAME	UNIT	BASE VALUE	TARGET VALUE

PROGRAMME-LEVEL OUTPUT INDICATORS

GUIDE

Please provide a detailed list in the table below of the output and result indicators of the Project (the outputs are the products, goods and services which result from the Project's funded activities; the results are the immediate advantages of carrying out the activities). All projects shall select at least one pre-defined output and one pre-defined result indicator from sections 4.7 and 4.8 of the Joint Operational Programme

INDICATOR NAME	UNIT	BASE VALUE	TARGET VALUE

Please click on any field of the sections for entering the indicators, as a result of which the data sheet of the indicator will appear with the following fields:

- **Guide** – completion guide.
- **Programme result indicator** – please select the indicator (if one type is selectable, the field will automatically be completed).
- **Unit** – automatically completed by selecting the indicator.
- **Base value** – please enter the base value of the indicator, up to a maximum six decimals.
- **Target value** - please enter the target value of the indicator, up to a maximum six decimals.
- **Source(s) of verification** – method of supporting the undertaken indicator.
- **Description** – based on the request defined by the entity that invited the application, please describe the indicator.

PROGRAMME-LEVEL RESULT INDICATOR DATASHEET ✕

🖫 Save   ⊘ Cancel

GUIDE

Please provide a detailed list in the table below of the output and result indicators of the Project (the outputs are the products, goods and services which result from the Project's funded activities; the results are the immediate advantages of carrying out the activities). All projects shall select at least one pre-defined output and one pre-defined result indicator from sections 4.7 and 4.8 of the Joint Operational Programme

PROGRAMME RESULT INDICATOR

Increased capacity in environmental protection and climate change mitigation (Based on surveys (baseline, mid-term, final) amo

UNIT   BASE VALUE !   TARGET VALUE !

survey

SOURCE(S) OF VERIFICATION !

WHICH IS/ARE THE PROGRAMME RESULT INDICATOR(S) TO WHICH THE PROJECT WILL CONTRIBUTE? CONSULT SECTION 4.8 OF THE JOP FOR THE PROGRAMME OUTPUT INDICATORS.   !

PROGRAMME-LEVEL OUTPUT INDICATOR DATASHEET ✕

🖫 Save   ⊘ Cancel

GUIDE

Please provide a detailed list in the table below of the output and result indicators of the Project (the outputs are the products, goods and services which result from the Project's funded activities; the results are the immediate advantages of carrying out the activities). All projects shall select at least one pre-defined output and one pre-defined result indicator from sections 4.7 and 4.8 of the Joint Operational Programme

PROGRAMME OUTPUT INDICATOR !

UNIT !   BASE VALUE !   TARGET VALUE !

SOURCE(S) OF VERIFICATION !

WHICH ARE THE PROGRAMME OUTPUT INDICATOR(S) TO WHICH YOUR PROJECT CONTRIBUTES? CONSULT THE LIST OF PROGRAMME RESULT INDICATORS IN SECTION 4.7. OF THE JOP.   !

After regularly filling in the fields appearing in the data sheet, save the data that you have entered by clicking on the **Save** button, while by clicking on the **Cancel** button, you can interrupt the data entry and you can return to the previous panel. Based on the above steps, please enter a number of result and output type program-level indicators in line with the priority in question.

4.8 Sustainability tab

The descriptions of different sustainability topics that belong to the application can be provided on the panel, with the following options:

- **Modify** – modification of the description that belongs to the criterion in question

For providing the description, please select a criterion and then click on the **Modify** button. As a result of this, the data sheet of the description will appear with the following fields:

- **Key Aspect** – the upper field is completed by the system, please, enter the description in the field under it.
- **Guide** – a field completed by the system, guidelines for correct completion.

Please save the entered data by clicking on the **Save** button, while the data entry can be interrupted by the **Cancel** button and you can return to the previous panel. On the basis of the above steps, please enter the descriptions for all the criteria.

4.9   Relevance of project tab

It is on this panel that the descriptions related to the project goal, the project implementation and the impacts of the project can be provided, with the following options:

- **Modify** – modification of the description that belongs to the criterion in question

Please select a criterion for specifying a description, then click on the **Modify** button. As a result of this, the data sheet of the description will appear with the following fields:

- **Key Aspect** - the upper field is completed by the system, please enter the description in the field under it.

- **Guide** - a field   filled   in   by   the   system,   guidelines   for   correct   completion.

Please save the entered data by clicking on the **Save** button, while the data entry can be interrupted by the **Cancel** button and you can return to the previous panel. On the basis of the above steps, please, enter the descriptions for all the criteria.

4.10 Cross cutting issue tab

It is on this panel that the response/description for the comprehensive actions of the application can be provided with the following options:

- **View** – viewing of the description data sheet that belongs to the action in question.

- **Modify** - modification of the description that belongs to the action in question.

For providing the description, please select an item from the list, then click on the **Modify** button. As a result of this, the data sheet of the action will appear with the following fields:

- **Key Aspect** - the upper field is completed by the system, please enter the description in the field under it.
- **Description** – please enter the description.
- **Guide** - a field completed by the system, guidelines for correct completion.

Please save the entered data by clicking on the **Save** button, while the data entry can be interrupted by the **Cancel** button and you can return to the previous panel. On the basis of the above steps, please, enter the descriptions for all the items.

For submitting the application, at least one Cross cutting issue should be committed to. If you do not commit to one of the actions, please enter "Not relevant" in the Description field.

4.11 Work plan tab

On this panel it is the activities to be implemented, as well as the related descriptions and if relevant, indicators can be specified by the predefined activity groups, with the following options:

- **New** – entering a new activity group.
- **Modify** – modification of an existing activity group.
- **Delete** – deletion of an existing activity group.
- **View** – viewing an existing activity group.

4.11.1 Main data

The hit list of the panel is empty by default, please start work by entering a new activity group. For this to come into effect, click on the **New** button. As a result of this, the data sheet of the *Work plan* will appear by default with the *Main data* tab. The fields appearing on the panel are as follows:

- **Number of the AG** – number of the activity group – automatically completed by the system.
- **Type of activity group** – please select the type of the activity group in the scroll-down list.
- **Title of the AG** – please enter the title of the activity group in a maximum 50 characters.
- **Description of the AG** – please enter the general description of the activity group in a maximum 300 characters.
- **Total AG indicative budget** – in the case of an activity group of the type "Soft project component" or "Infrastructure", please specify the total costs that belong to the activity group. Pleasenote that the total budget of the application and the total of the costs planned for the individual activity groups should correlate.
- **Project management indicative budget** - for the activity group "Project management and communication", please specify the total planned costs that belong to the activity group. Please note that the total budget of the project proposal and the total of the costs planned for the individual activity groups should correlate.
- **Communication indicative budget** - for the activity group "Project management and communication", please specify the total planned costs that belong to the activity group. Please note that the total budget of the project proposal and the total of the costs planned for the individual activity groups should correlate.
- **Responsible applicant** – in the case of an activity group of the type "Soft project component" or "Infrastructure", select the applicant(s) responsible for the implementation of the activity group from among the applicants specified on the *Application* tab.
- **Responsible applicant for project management** - for the activity group "Project management and communication", please select the applicant(s) responsible for project management from among the applicants specified on the *Application* tab.

- **Responsible applicant for communication** – for the activity group of the type "Project management and communication", please select the applicant(s) responsible for communication from among the applicants specified on the *Application* tab.
- **Applicant's involved** – please specify the applicant(s) involved in the implementation of the activity group.


After regularly filling in the fields appearing in the data sheet, save the data that you have entered by clicking on the **Save** button, while by clicking on the **Cancel** button, you can interrupt the data entry and you can return to the previous panel. As a result of the **Save** button, the further relevant tabs will appear on the basis of the selected activity group.

4.11.2 Activities

In the *Activities* tab, you can specify the activities that belong to an activity group using the following options:

- **New** - adding new activities.
- **Modify -** modifying existing activities.
- **Delete -** deleting existing activities.

- **View -** viewing existing activities.
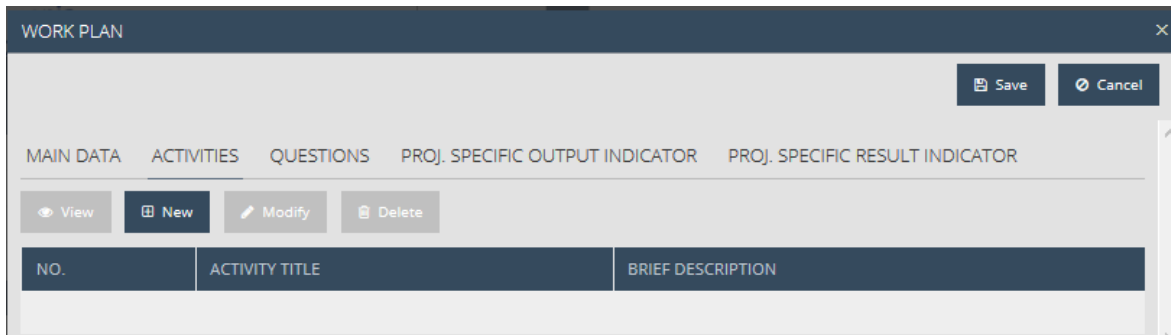
Please start adding activities by clicking the **New** button. A datasheet of activities will appear with the following fields:

- **Activity title** - Please type the name of the activity.
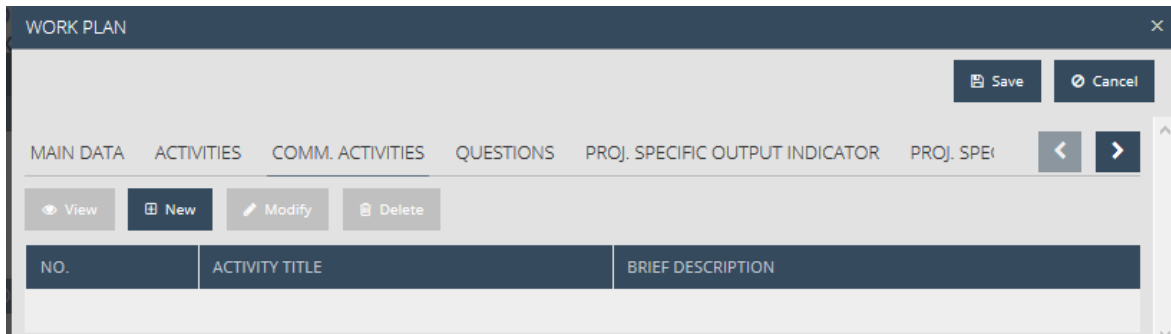- **Brief description** - Please give a description of the activity.
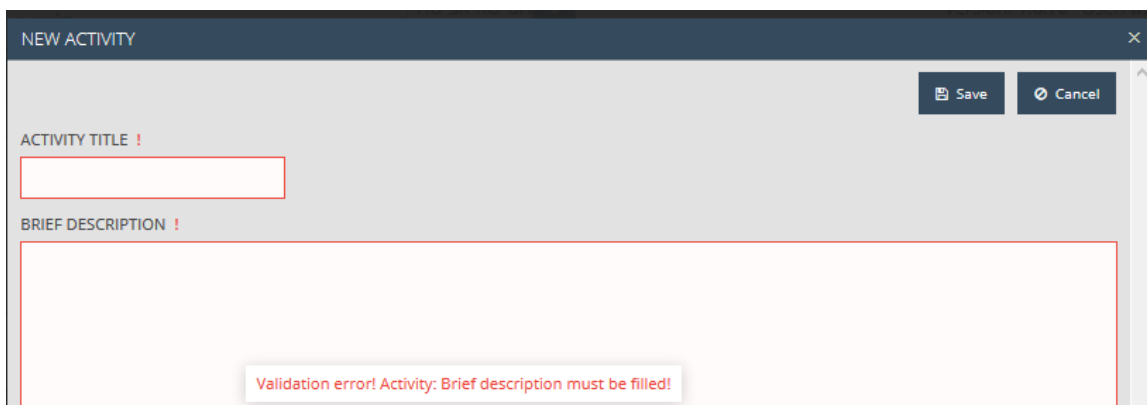
After properly filling in the fields of the datasheet, click on the **Save** button to save your data. By clicking **Cancel**, you can abort the process and return to the previous page.

By selecting an item from the list of items of the **Activities** tab and clicking the **Modify** button, you can modify the given item. If you click on the **Delete** button, you can delete the given item after confirming your intention to do so. Click on the **View** button to access the data of an item.

4.11.3 Communication activities

A tab appears for the *Project management and communication* type activity group. You can add communication activities that belong to the activity group in the *Comm. activities* tab using the following options:

- **New** - adding new communication activities.
- **Modify** - modifying existing communication activities.
- **Delete** - deleting existing communication activities.
- **View** - viewing existing communication activities.

Please start adding communication activities by clicking the **New** button. A datasheet of communication activities will appear with the following fields:

- **Activity title** - Please type the name of the communication activity.
- **Brief description** - Please give a description of the communication activity.
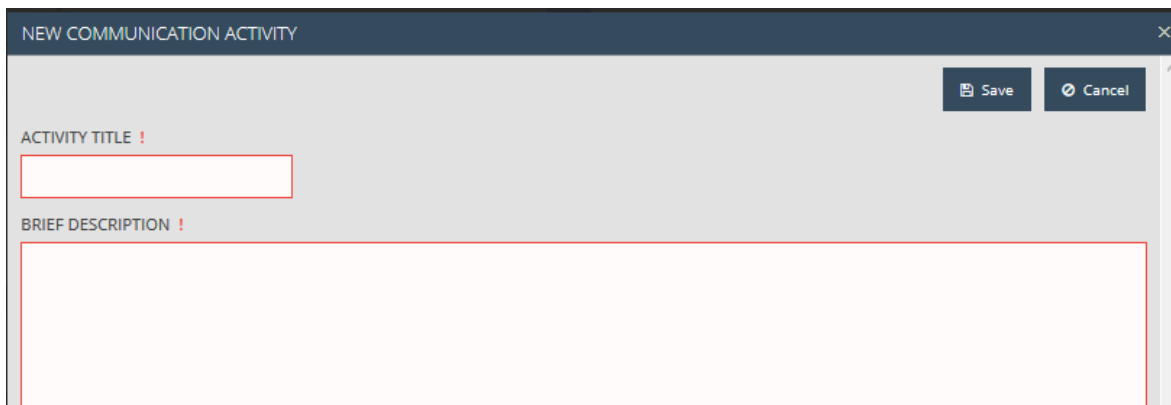
After properly filling in the fields of the datasheet, click on the **Save** button to save your data. By clicking **Cancel**, you can interrupt the process and return to the previous page.

By selecting an item from the list of items of the Comm. activities tab and clicking the **Modify** button, you can modify the given item. If you click on the **Delete** button, you can delete the given item after confirming your intention to do so. Click on the **View** button to access the data of an item.
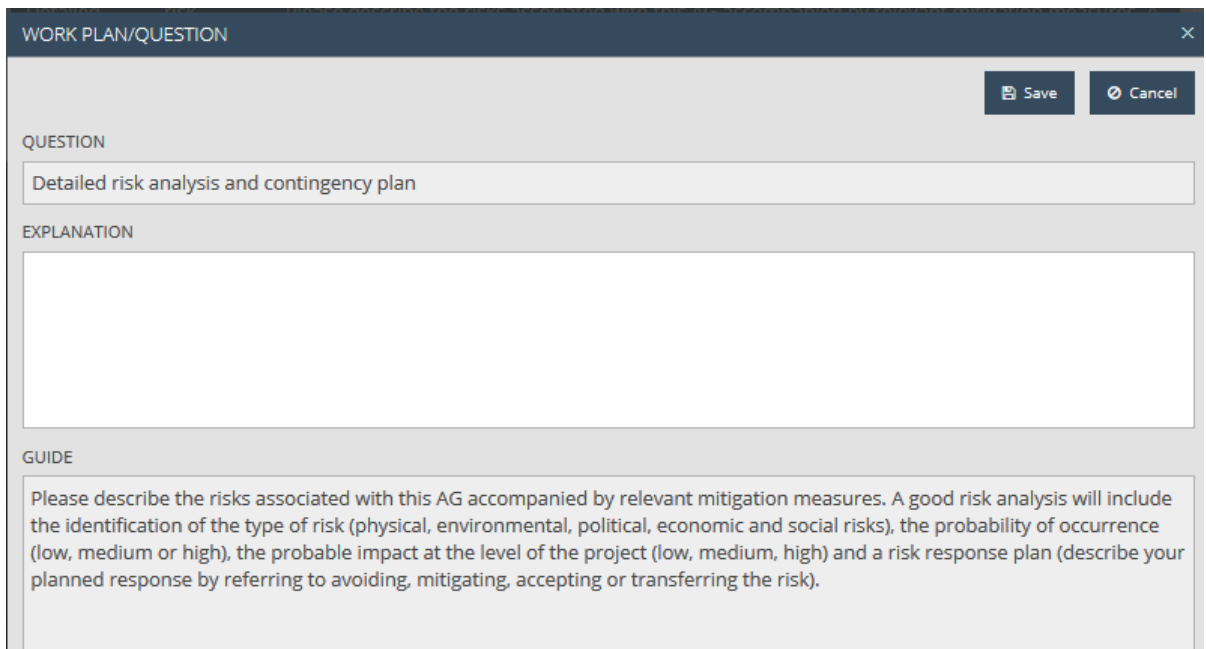
4.11.4 Questions

In the *Questions* tab, you can give answers to the questions shown in the *Main data* tab of the activities using the following options:

- **Modify** - specifying the answer to the selected question.
- **View** - viewing the selected question.
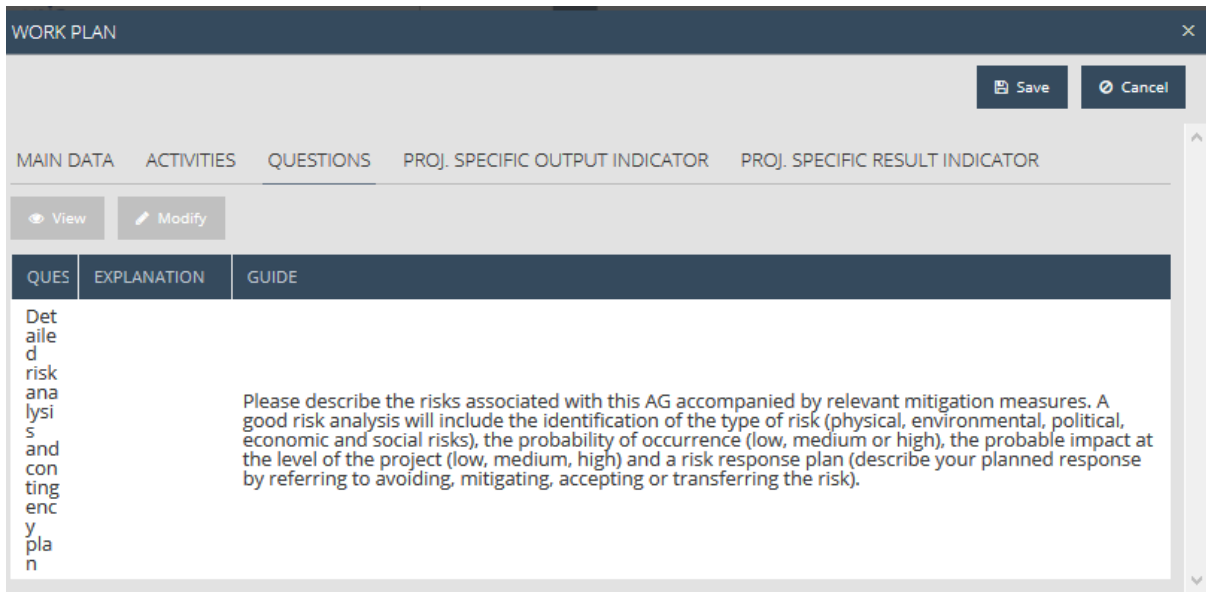
In order to be able to provide an answer, select a question related to an activity and click the **Modify** button. A datasheet of the question will appear with the following fields:

- **Question** - a field filled in by the system that shows the question. Drag the margins of the table in order tp make the text more visible.
- **Explanation** - please type your answer to the question.
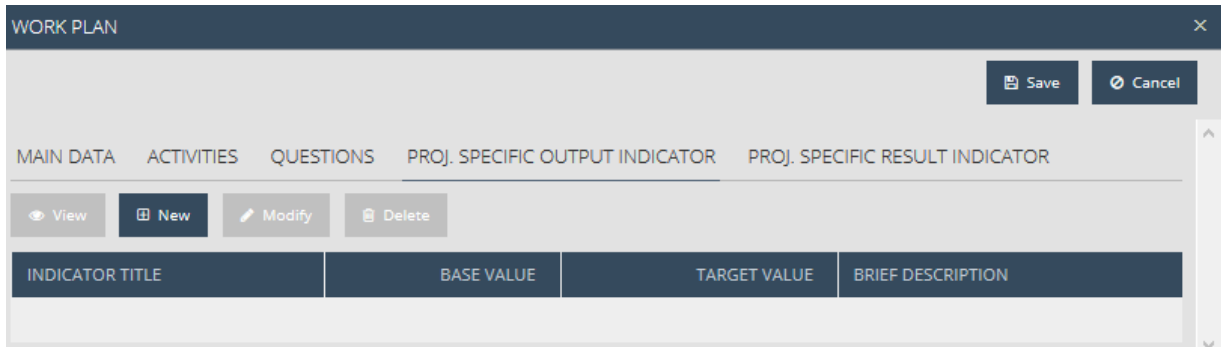- **Guide** - a guide to filling in the fields.

After filling in the *Explanation* field of the datasheet, click on the **Save** button to save your data. By clicking **Cancel**, you can interrupt the process and return to the previous page. Please give your answers to all the questions based on the steps above.

4.11.5 Project specific output indicator

A tab that appears in the case of Soft project component type activity groups. You can specify Project specific output indicators using the following options:

- **New** - adding new indicators.
- **Modify** - modifying existing indicators.
- **Delete** - deleting existing indicators.
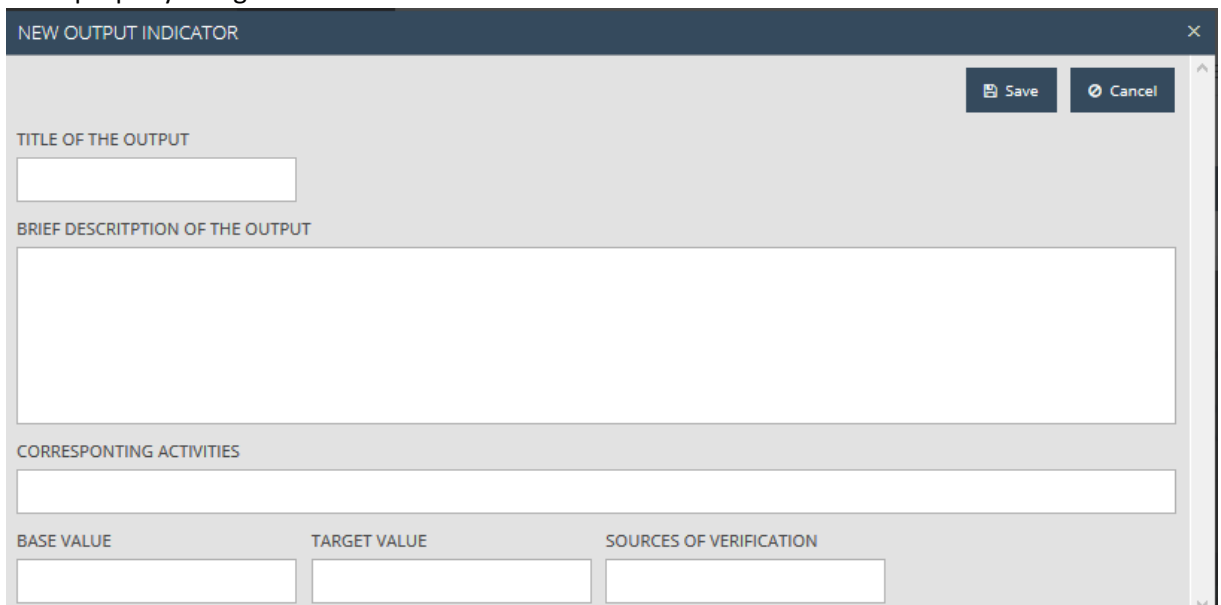- **View** - viewing existing indicators.

Please start adding indicators by clicking the **New** button. You will see an indicator datasheet with the following fields:

- **Title of the output** - please give the name of the indicator in a maximum of 100 characters.
- **Brief description of the output** - please give a description of the indicator in a maximum of 500 characters.
- **Corresponding activities** - please specify the corresponding activities.
- **Base value** - please give the base value of the indicator up to a maximum of 6 decimal places.
- **Target value** - please give the target value of the indicator up to a maximum of 6 decimal places.
- **Sources of verification** - please give the source to check the completion of the indicator.

After properly filling in

After properly filling in the fields that appear in the datasheet, click on the **Save** button to save your data. By clicking **Cancel**, you can interrupt the process and return to the previous page.

By selecting an item from the list of items of the Project specific output indicator tab and clicking the **Modify** button, you can modify the given item. If you click on the **Delete** button, you can delete the given item after confirming your intention to do so. Click on the **View** button to access the data of an item.

4.11.6 Project specific result indicator

A tab that appears in the case of Soft project component and Infrastructure type activity groups. You can specify Project specific result indicators using the following options:

- **New** - adding new indicators.
- **Modify** - modifying existing indicators.
- **Delete** - deleting existing indicators.
- **View** - viewing existing indicators.

Please start adding indicators by clicking the **New** button. You will see an indicator datasheet with the following fields:

- **Result title** - please give the name of the indicator in a maximum of 100 characters.
- **Please provide a brief description of the result emerging from this AG (activity group)** - please give a description of the indicator in a maximum of 500 characters.
- **Programme output indicator or other indicators to which the result will contribute** - please specify which program level outputs or other indicators the given indicator contributes to.
- **Base value** - please give the base value of the indicator.
- **Target value** - please give the target value of the indicator.
- **Sources of verification** - please give the source to check the completion of the indicator.

NEW RESULT INDICATOR ✕

💾 Save ⊘ Cancel

RESULT TITLE

PLEASE PROVIDE A BRIEF DESCRIPTION OF THE RESULTS EMERGING FROM THIS AG

PROGRAMME OUTPUT INDICATOR OR OTHER INDICATORS TO WHICH THE RESULT WILL CONTRIBUTE

BASE VALUE   TARGET VALUE   SOURCES OF VERIFICATION

After properly filling in the fields that appear in the datasheet, click on the **Save** button to save your data. By clicking **Cancel**, you can interrupt the process and return to the previous page.

By selecting an item from the list of items of the Project specific result indicator tab and clicking the **Modify** button, you can modify the given item. If you click on the **Delete** button, you can delete the given item after confirming your intention to do so. Click on the **View** button to access the data of an item.

4.12 Communication plan tab

In this tab you can give answers to questions related to the communication of your application and you can modify your previous answers. You have the following options to manage your information provision activities:

- **Modify** - giving/modifying answers.

Please start entering answers by clicking on one of the items of the list and then the **Modify** button. You will see the datasheet of the given question with the following fields:

- **Question** - a field filled in by the system that shows the question.
- **Explanation** - please type your answer to the question.
- **Guide** - a guide to filling in the fields.

COMMUNICATION PLAN DATASHEET

QUESTION

Project specific objective.

EXPLANATION !

GUIDE

Please restate your project specific objectives in order make it more visible on how they correlate with the project's communication

After filling in the Explanation field of the datasheet, click on the **Save** button to save your data. By clicking **Cancel**, you can interrupt the process and return to the previous page. Please give your answers to all the questions based on the steps above.

4.13 Time plan tab

In this page you can assign registered activities – as activity groups and as separate activities within the groups – to a given months of the application period in order to schedule these activities. The program will generate the registered activities and will list them in this page.

Please indicate which month you assign to which activity by using the checkboxes.

Please make sure that you assign at least 1 month to each activity.

In the case of activities relevant for the entire life-cycle of the project, i.e. for an activity that is carried out throughout the whole implementation period, you can select every month by clicking the **Check all** checkbox.

The Time plan page does not have its own **Save** button. If you have filled in the page, please go on by clicking the *Procurement plan* tab.

4.14 Procurement plan tab

This is where you can indicate the procurements you planned for the application period by applicants using the following options:

- **New** - adding new procurements.
- **Modify -** modifying existing procurements
- **Delete -** deleting existing procurements.
- **View -** viewing existing procurements.

The search list of the page is empty by default. Please start your work with adding new procurements by clicking the **New** button. You will see a procurements datasheet with the following fields:

- **NO.** – a field filled in by the system showing the number of the procurement.
- **Applicant/Country** - please select the applicant that will carry out the procurement from the options in the drop-down list.
- **Type of contract** - please select one from the options in the drop-down list.
- **Description of items to be purchased (except for direct award procedures)** - please give a description of the contract in a maximum of 500 characters (space characters included).
- **Month of planned announcement of the procurement** - please indicate which month the procurement is planned for; e.g. 1 (being the first month of implementation) or 2, etc.
- **Estimated date of award** - please indicate the expected date of the award.
- **Duration of the implementation of the contract (months)** - please indicate the duration of the implementation of the contract.
- **Budget line** - please select one of the items in the drop-down list; (you should scroll down three times to have a view of all the budget lines from 1.1 to 6.3.).
- **Value of the contract** - please indicate the value of the contract.
- **Title of the selected procurement procedure in English and if applecable, in the national language** - please name the subject of the procurement in English and in the official language of the applicant.
- **Justification guide** - a field filled in by the system: a guide to the description in a maximum of 500 characters (space characters included).
- **Justification** - please give the description of your justification in a maximum of 1000 characters.
- **Implementation year** - please indicate which year of the implementation the procurement is linked to.
- **Corresponding activities group** - please indicate the activity group(s) related to the procurement.

PROCUREMENT PLAN DATASHEET   ✕

🖫 Save   ⊘ Cancel

NO.

1

APPLICANT/COUNTRY !

TYPE OF CONTRACT !

DESCRIPTION OF ITEMS TO BE PURCHASED (EXCEPT FOR DIRECT AWARD PROCEDURES) !

MONTH OF PLANNED ANNOUNCEMENT OF THE PROCUREMENT !

ESTIMATED DATE OF AWARD !

DURATION OF THE IMPLEMENTATION OF THE CONTRACT (MONTHS) !

BUDGET LINE !

VALUE OF THE CONTRACT (EUR) !

TITLE OF THE SEL. PROCUREMENT PROCEDURE IN ENG. AND IF APPLECABLE, IN THE NAT. LANGUAGE !

JUSTIFICATION GUIDE

How the selected procedure corresponds to the procurement procedures;
  - Reference to the applicable national legal acts and articeles;
  - How the origin shall be ensured for purchases over 100.000€;
  - In case of split of procurement, provide justification for such split;
  - In case of split of procurement procedure into lots, provide number and title of lots

JUSTIFICATION !

IMPL. YEAR !

CORRESPONDING ACTIVITIES GROUP !

After properly filling in the fields that appear in the datasheet, click on the **Save** button to save your data. By clicking **Cancel**, you can interrupt the process and return to the previous page.

By selecting an item from the list of items of the *Procurement plan* tab and clicking the **Modify** button, you can modify the given item. If you click on the **Delete** button, you can delete the given item after confirming your intention to do so. Click on the **View** button to access the data of an item.

4.15 Project team tab

In the *Project team* screen, you can give the position of the project participants and the description of their responsibilities using the following options:

- **New** - adding new members.
- **Modify** - modifying existing members.
- **Delete** - deleting existing members.
- **View** - viewing existing members.

The search list of the page is empty by default. Please start your work with adding new members by clicking the **New** button. You will see a Project member datasheet with the following fields:

- **Proposed position** - please indicate the position to be filled.
- **Name of expert** - please give the name of the expert or state "to be recruited" depending on the case.
- **Years of experience** - please specify how many years of experience the expert has.
- **Educational background** - please indicate the expert's educational background.
- **Special areas of knowledge** - please indicate special expertise.
- **Experience in beneficiary country** - please indicate experience obtained in the applicant country.
- **Languages and degree of fluency (very good, good, weak)** - please indicate the level of language skills.

PROJECT MEMBER DATASHEET

Save   **Cancel**

PROPOSED POSITION !

NAME OF EXPERT !   YEARS OF EXPERIENCE !

EDUCATIONAL BACKGROUND

SPECIALIST AREAS OF KNOWLEDGE

EXPERIENCE IN BENEFICIARY COUNTRY

LANGUAGES AND DEGREE OF FLUENCY (VERY GOOD, GOOD, WEAK)

After properly filling in the fields that appear in the datasheet, click on the **Save** button to save your data. By clicking **Cancel**, you can interrupt the process and return to the previous page. Please add all the members following the steps above.

By selecting an item from the list of items of the Project team tab and clicking the **Modify** button, you can modify the given item. If you click on the **Delete** button, you can delete the given item after confirming your intention to do so. Click on the **View** button to access the data of an item.

4.16 Project budget tab

You can build your detailed budget plan in the **Project budget** screen.

You should start entering your data manually for each applicant. The system automatically aggregates the project budget on the basis of the applicants level data. It is mandatory to fill in the fields in a red frame.

The Project budget screen can be divided into 2 parts:

- The top part contains the applicants' participating in the project.
- The bottom part contains the applicants level budget lines the program aggregates in the *Total cost* line by applicants and in the *Total budget (EUR)* column by budget lines.

APPLICATION SEARCH ➲   APPLICATION FORM ➲   🖫 Save

INFORMATION REMINDER   ↓

PROCUREMENT PLAN   PROJECT TEAM   PROJECT BUDGET   SOURCES OF FUNDING   CHECKLIST   DOCUMEN   ‹ ›

18. BUDGET

GUIDE

1. The Budget must cover all eligible costs of the Project, not just the ENI contribution. The description of items must be sufficiently detailed and all items broken down into their main components. The number of units and unit rate must be specified for each component depending on the indications provided.
2. All costs must be broken down into their individual components.
3. The budget shall be established in euro. Costs and unit rates are rounded to the nearest euro cent.
4. If staff are not working full time on the designed project, the percentage should be indicated alongside the description of

🖉 Modify budget by Applicant

APPLICANT ABBREVIATED NAME	ROLE	COUNTRY
AbbrLB	Lead Applicant	Slovakia
AbbrB1	Applicant 1	Hungary

BUDGET LINES	LA - ABBRLB	A1 - ABBRB1	TOTAL BUDGET (EUR)	SHARE (%)
1. Human Resources	0,00	0,00	0,00	0
1.1 Salaries of internal project manager	0,00	0,00	0,00	0
1.2 Salaries of internal project financial manager	0,00	0,00	0,00	0
1.3 Salaries of internal project communication manager	0,00	0,00	0,00	0
1.4 Salaries of internal professional staff	0,00	0,00	0,00	0
2. Travel	0,00	0,00	0,00	0
2.1 International travel cost for project staff (including travel and subsistence costs)	0,00	0,00	0,00	0
2.2 Inland travel cost for project staff (including travel and subsistence costs)	0,00	0,00	0,00	0

4.16.1 Modifying budget of the Applicant

Please select an applicant that participates in the project by clicking its name and then click the **Modify budget by Applicant** button. You will see our new *Budget by Applicant* window where you can record planned expenses by budget lines. The grey fields are filled in by the system. You can record a new budget item by clicking the **New** button of the given budget line. You can modify existing items by clicking the **Modify** button and you can delete them by clicking the **Delete** button. Please leave this page by clicking the **Save** button to save your data.

4.16.2 Recording, modifying and deleting a budget item

To create a Budget item (level 3) line, click on the **New** button of a Budget line (level 2), e.g. "International travel cost for project staff (including travel and subsistence costs)". You will see a new *Budget by Applicant* window. Please leave the panel by clicking on the **Add** button to save your data.

The fields shown in the window:

- **Role** - a field filled in by the system by classifying the selected applicant.
- **Applicant abbreviated name** - the short name of the applicant.

- **No.** - the number of the Budget line to be recorded.
- **Budget line** - the name of the Budget line.
- **Guide** - a guide to filling in the window.
- **Budget item no.** - the number of the Budget item.
- **Name of the item** - please give the name of the item.
- **Unit** - please identify the unit of measurement.
- **No. of units** - please identify the number of units with a maximum of 2 decimal places.
- **Unit price** - please indicate the price per unit with a maximum of 2 decimal places.
- **Amount** - the product of the number of units and the price per unit.
- **Description** - please give a description of the item.

You can modify a budget item line that you have created by using the **Modify** button and you can delete it by using the **Delete** button and confirming your intention to do so. You can abort any process you have started by clicking the **Cancel** button.

Please record all your planned expenses in all the budget lines following the procedure described above.

4.17 Sources of funding tab

The **Sources of funding** tab contains the aggregated budget of the applicants participating in the project and the sources of funding with their amounts and calculated values.

This is also where you can indicate in what percentages the budgets of the applicants are divided between the different sources.

APPLICATION FORM ⊘   🖫 Save

INFORMATION REMINDER   ↓

PROJECT TEAM   PROJECT BUDGET   SOURCES OF FUNDING   CHECKLIST   DOCUMENTS   ‹   ›

19. SOURCES OF FUNDING

GUIDE

1.   Please fill the Applicant part's % level of the ENI and National contributions which is the sum of State contribution and Own contribution.
2.   The project level of ENI contribution: max. 90%-min 50% of the total cost.
3.   The own contribution rate needs to come from own resources (other than EC Grants).
4.   In case of Member States (HU, SK, RO) the state contribute 5% or 10% co-financing depending on the legal entity of the Applicant. This issue will be checked and clarified in the Grant Contract.

SOURCES OF FUNDING	LA - XX AMOUNT (UA)	LA - %	TOTAL BUDGET	SHARE
ENI contribution	0,00	0,00	0,00	0,00
National contribution	0,00	0	0,00	0,00
State contribution	0,00	0	0,00	0,00
Own contribution	0,00	0,00	0,00	0,00
Total eligible cost expected		0	0,00	0,00
Total costs		100	0,00	0,00

✎ Modify

SOURCES OF FUNDING	LA - XX AMOUNT	LA - %	TOTAL BUDGET	SHARE
Planned net revenues		0	0,00	0,00

- **ENI contribution** - the rate of EU contribution by applicants and in total.
- **State contribution** - the rate of state contribution by applicants and in total.
- **National contribution** - the rate of national contribution by applicants and in total.
- **Own contribution** - the rate of own contribution by applicants and in total.
- **Total costs** - total costs indicated in the budget lines by applicants and in total.
- **"Planned net revenues"** should register any revenues that are envisioned to be generated by the project. Please correlate this section with the state aid declarations. Revenues generated during the project will be deducted from the total eligible costs expected.

You can indicate the percentage of contributions according to the following rules:

- **ENI contribution:** can be a maximum 90% of the total budget of the applicant.
- **State contribution:** if the applicant is Hungarian, Romanian or Slovakian, state contribution can be a maximum of 10% of the total budget. Where the selected country is not Ukraine and the amount of ENI contribution decreases, the amount of state contribution must also be reduced in the same rate and and the reduction must be charged to *Own contribution*.
- **National contribution:** a calculated value, the sum of state and own contributions.

4.18 Checklist tab

You will find a checklist prepared in advance in the **Checklist** screen. In this section one has to chose between "yes" or "no"answers to the questions listed here by clicking the checkboxes. In this way you can declare if you meet the requirements indicated in the given question or not. Please go through all the items of the list; if necessary (you will find a tick in the Mandatory column next to mandatory questions).

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APPLICATION FORM ⊙   🖺 Save

INFORMATION REMINDER   ⬇

PROJECT TEAM   PROJECT BUDGET   SOURCES OF FUNDING   CHECKLIST   DOCUMENTS   ‹   ›

16. CHECKLIST

GUIDE

Before sending your proposal, please check that each of the following criteria have been met in full and tick them off.

# ▲	CHECK ITEM	PLEASE MARK	MANDATORY
1	The proposal is typed and is in English.	☐ !	☑
2	The Lead Applicant has completed, signed and included the Declaration by the Lead Applicant.	☐ !	☑
3	All Applicants have completed and signed the Declaration(s) by the Applicant(s) and they are enclosed.	☐ !	☑
4	The legal entity form is completed, signed and enclosed.	☐ !	☑
5	The financial identification form is completed, signed and enclosed.	☐ !	☑
6	The budget of the project and the financial plan are enclosed, presented in the format requested, and stated in EUR.	☐ !	☑
7	Financial capacities are enclosed.	☐ !	☑
8	The state aid declarations are completed, signed and enclosed.	☐ !	☑
9	Copy of the Lead Applicant's and all the Applicants' approved and audited annual accounts for the last two financially closed years are enclosed.	☐ !	☑
10	The Statutes or Articles of association of the Lead Applicant organisation in original language accompanied with brief English summary are enclosed	☐ !	☑
11	The Statutes or Articles of association of each Applicant organisation in original language accompanied with brief English summary are enclosed	☐ !	☑
12	Specimen of signature of the legally authorized representative of the Lead Applicant organisation issued by a public notary is enclosed	☐ !	☑
13	Documents of infrastructure (detailed description, location(s), full feasibility study or equivalent, EIA, ownership, project technical documentation, buiding permit etc.) are enclosed - if relevant	☐ !	☑

4.19 Documents tab

In the **Documents** screen, you will find the list of documents you have to submit together with the application and you can upload files. You can manage your documents using the following options:

- **New** - adding new documents.
- **Modify** - modifying existing documents.

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- **Delete** - deleting documents you have uploaded.
- **View** - viewing existing documents.

4.19.1 Uploading files

In this screen, you will see documents that need to be uploaded arranged in folders. Select a folder and click on the **Modify** button to upload the required documents. If it is mandatory to upload documents in a certain folder in order to submit your application, you will see a tick in the checkbox of the *Mandatory* column. Please note that documents indicated as Mandatory Annexes are equivalents of the documents referred to in the *Guidelines for applicants for the 3rd Call for*

Proposals as Annexes to the Grant Application Form (Annex 1: the Declaration by the Lead Applicant, Annex 2: the Declaration(s) by the Applicant(s), Annex 3 and 4: the State aid declarations, Annex 5: the Legal Entity Form and Annex 6: the Financial Identification Form), the published documents which have to be filled in (Budget, Financial plan and Financial capacity) and the supporting documents (numbered between 1-4 being mandatory to upload for all project proposals and between 5-9 being mandatory to upload for project proposals with infrastructure element according to the conditions as defined in the Guidelines). The templates of Annexes 1-6 and the published documents which have to be filled in are all included in the Application Package published on November 2019 on the Programme official website (https://huskroua-cbc.eu/) except for Annex 5 and 6 where the direct link is provided in the Grant Application Form from where the templates can be downloaded.

Start with uploading a file into the *"Documents"* section. Select a document in the search list and click on the **Modify** button. You will see a *Document datasheet* window with a *Main data* tab as a default.

You will see the following fields of document data in the page:

- **Folder** - the system will save the document in the folder indicated by the route shown in this field.
- **Method of submission** - the method of submission.
- **Document ID** - the ID of the document: generated by the system.
- **Date of preparation** - date of preparation: generated by the system.
- **Type** - type of the document.
- **Subject** - subject of the document.
- **Mandatory** – if ticked than Yes, mandatory
- **Description** – Please read carefully the description part where important instructions concerning the documents are provided.
- **Language of the document.**
- **To be submitted in original or copy.**

Continue by clicking on the *Files* tab.

On the top of the page, you can refine your search using the following fields:

- **File name (ID)** - the individual identifier of the file.
- **Type** - the extension format of the file.
- **Original file name** - the name of the file.
- **Sequence number** - the sequence number of the fine.

On the bottom of the page, you can manage your files using the following options:

- **Download** - downloading files.
- **Upload** - uploading your files.
- **Delete** - deleting existing files.
- **Reorder** - arranging existing files.

Please click on the **Upload** button. You will see a *File upload* pop-up window. Select the file you want to upload and then click on the **Open** button.
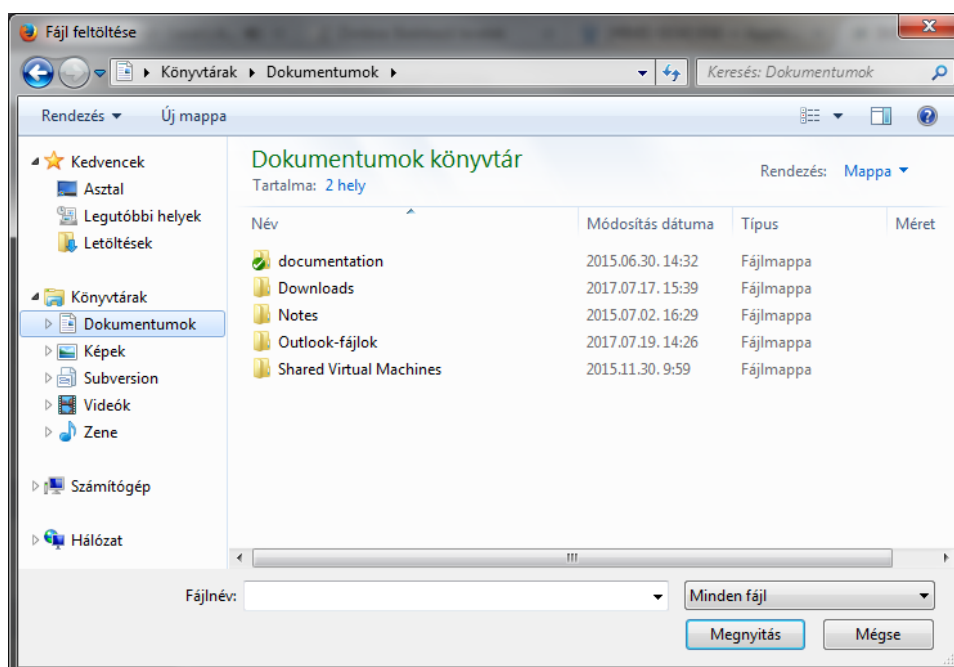
The file you selected and uploaded will appear under the given document in the search list. Save the uploaded file by clicking on the Save button. In case of more files have to be uploaded under the same document you can manage it by again clicking on the Upload button and continuing the procedure as written above.

4.19.2 Creating new documents

If you want to upload other documents then the ones predefined in the folders, please click on the **New** button. You will see a *Document datasheet* window with a *Main data* tab with the following fields:

- **Folder** - the system will save the document in the folder indicated by the route shown in this field.
- **Method of submission** - please select the communication method.
- **Document ID** - the ID of the document: generated by the system.
- **Date of preparation** - date of preparation: generated by the system.
- **Type** - please select the type of the document.
- **Subject** - please identify the subject of the document.
- **Prepared by (user id)** - the ID of the user.
- **Prepared by (user name)** - the name of the user.
- **Sent by (Applicant ID)** - the ID of the Applicant who sent the document.
- **Sent by (Applicant name)** - the name of the Applicant's who sent the document.

After properly filling in the fields that appear in the *Document datasheet* tab, click on the **Save** button. You will see the panel of the *Files tab* where you can start uploading your file following the procedure described above.

4.20 Saving your application

You can interrupt creating an application any time and you can save the data you have entered by clicking the **Save** button in the top right corner. The system will save your application and it will be shown in the application search list. If you open your application there, you can continue working with version you last saved.

5 How to modify, view or delete your application?

5.1 Viewing the application

After saving your application, click on the *Search option* of the *Application* section to open the application search. In the search list, you will find the applications you created earlier. Click on the line of the application you want to see and then click on the *View* button above the list.

One can now access the panel initially created, with the difference that the project application appears in read-only mode. You cannot modify your application in this mode. You can leave the *view mode* by clicking any option in the menu or the heading of the panel.

5.2 Modifying an application

After saving your application, click on the *Search* option of the Application section to open the application search. In the search list, you will find the applications you created earlier. Click on the application you want to modify and then click on the **Modify** button above the list.

One can now access the panel initially created in IMIS. Here you can edit your data. You can save your modifications as described in the section *Saving applications* or you can abort the process without saving anything by clicking any option in the menu or the heading of the panel.

One can only modify the content of the application if the status of the application is *Under preparation* or *Need amendment*. In all other cases, the **Modify** button is inactive and one cannot modify the submitted application.

If your submitted application is found to contain inconsistencies or some of the annexes or supporting documents (non mandatory for the submission phase) are missing, during the administrative and eligibility check, you will receive a notification email with the request to provide clarification or missing documents within a specific deadline In such a case, the status of your application will become *Need amendment* and, after clicking the **Modify** button, you can upload missing documents and your answers to the the clarification questions into the *Formal Completion* folder**. During the completion process, there is no possibility to modify the data of your application you recorded earlier or the documents you uploaded in other folders.**

> **Please be aware that during the completion phase, the Lead Applicant can only submit the needed/ missing/ required documents as well as any particular explanations via IMIS. The Programme bodies cannot upload any missing documents in the system on the behalf of the Applicants that are either received electronically or in hard copy.**

5.3 Deleting the application

After saving your application, click on the *Search* option of the Application section to open the application search. In the search list, you will find the applications you created earlier. Click on the line of the application you want to delete and then click on the **Drop** button above the list.

You will see a confirmatioin panel, in which you are asked to confirm the deletion of the application. If you click **Cancel**, you can abort the process, whereas if you click **OK**, the application will be deleted and will disappear from the search list.
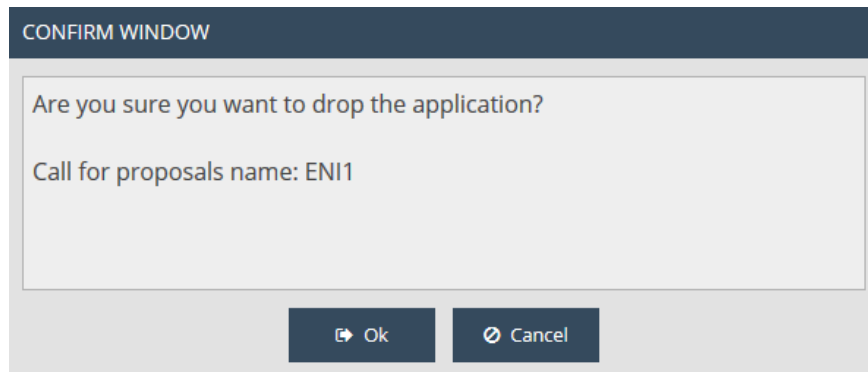
It is important that you can only delete your application if its status is *Under preparation*. In all other cases, the **Drop** button is inactive and you cannot delete the submitted application.

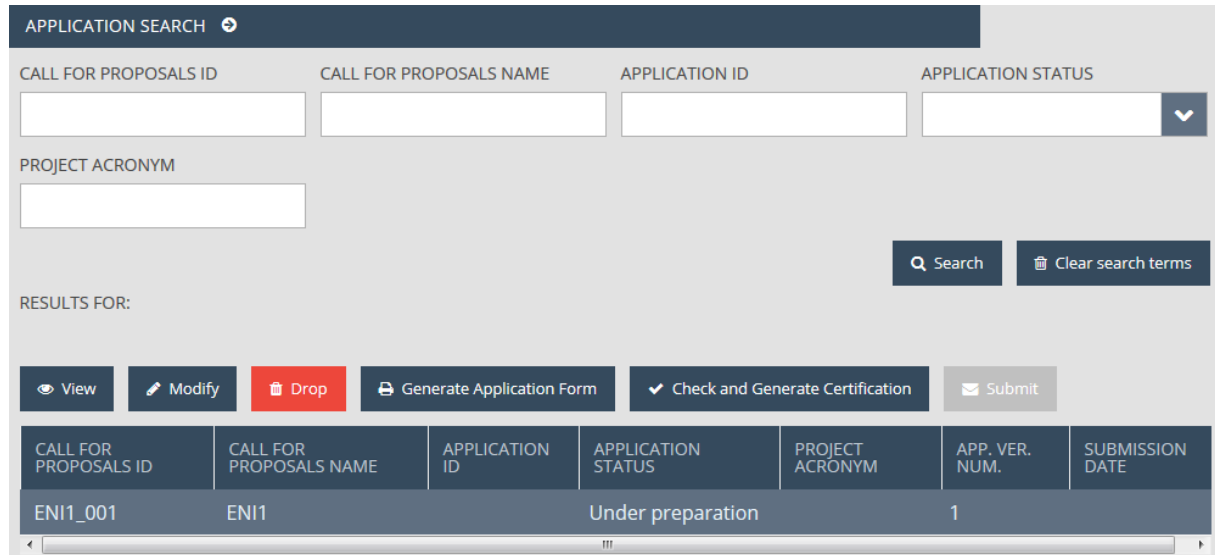# 6   How to generate a form from your application?

After saving your application, click on the **Search** option of the Application section to open the application search. In the search list, you will find the applications you created earlier. Click on the application you want to generate as from and then click on the **Generate application form** button above the list.

Shortly, you will see a download window in which you can open or download the document you generated (in PDF format). Since the data is finalised only when you submit your application, the generated document reads **DRAFT** in the header and footer.

This function is also available while creating a document so you will not need all the panels to be filled in to use it.
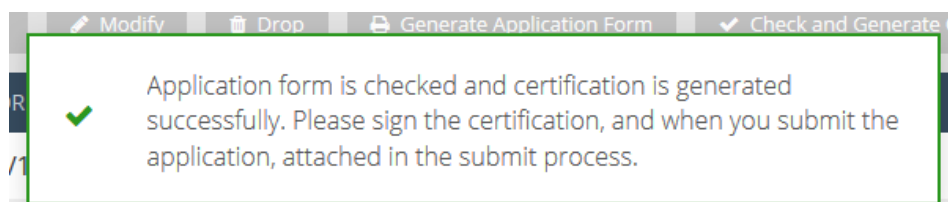
7 How to submit your application?

In case you have filled in and saved your application, click on the *Search* option of the Application section to open the application search. In the search list, you will find the applications you created earlier. Click on the line of the application you want to submit and then click on the *Check and Generate certification* button above the list. The system will run an automatic check which can have the following outcomes:

- **Check failed** - if the automatic check finds errors in the application to be submitted, the system will inform the applicant about the errors in an easily identifiable way in a pop-up window. You can open or download the list of errors in DOC format by clicking the *Download the error list* button. You can close the pop-up window why clicking the **Cancel** button and you can modify your application. Correcting the listed errors is a prerequisite of a successful submission.
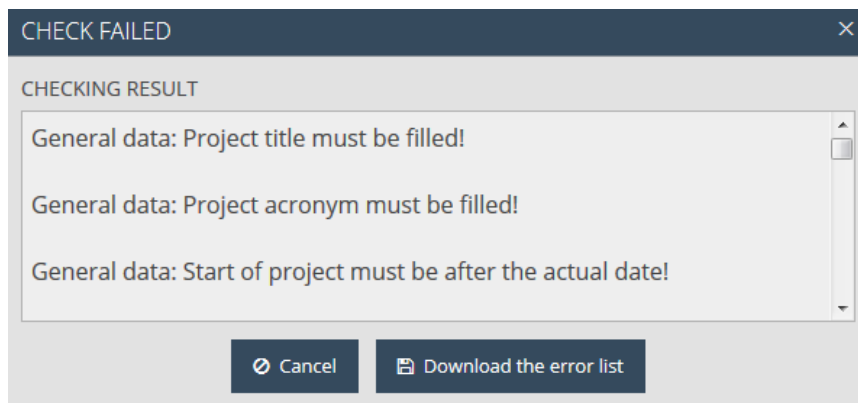
- **Check successful** - if the automatic check does not find any errors in the application, the system offers a certificate for download, and saves it among the documents of the application. The system also notifies the applicant about further things to do. The applicant must sign the certificate and upload it when submitting the application.


You can use the *Check and Generate certification* function any time so you can check a panel while you are preparing an application.

**Please make sure you download and sign the certificate!**

In order to submit your application, click the *Search* option of the Application section, select the application to be submitted and click on the **Submit** button (a successful automatic check is a prerequisite of submitting your application so if the **Submit** button is inactive, run the check by clicking the **Check and Generate certification** button before).

If you start a modification process of your application after a successful check and generate a certificate, certificates generated earlier will be deleted and you will need another successful check and the generation of a new certificate.

When you click the **Submit** button, a pop-up window appears in which the system asks you to upload the certificate you signed. You can do so by clicking the **Upload** button. Please click on it and upload the signed certificate.
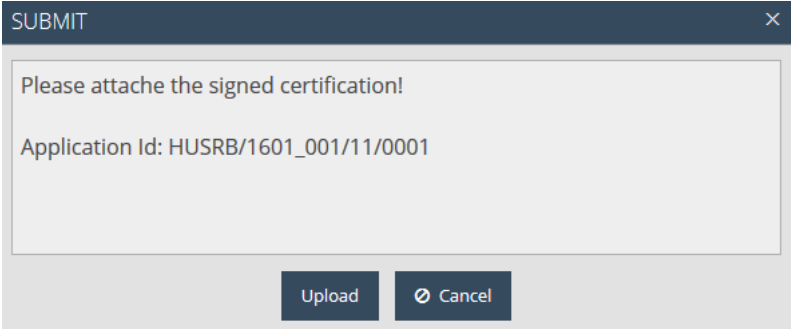
The system informs you about a successful upload in a pop-up window and the status of the application in the application search will become *Submitted*.
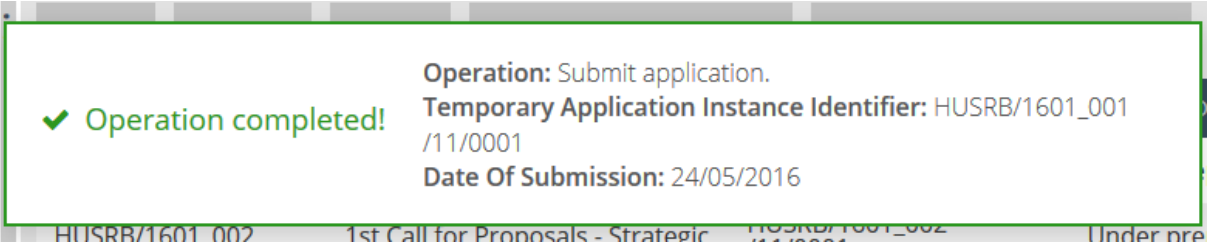
You can view and download the final Application Form the system generated when you submitted your application, the uploaded certificate and the previously uploaded documents any time in the Documents tab of the application. After submitting an application, applicants can only use the View function for the submitted application. You can check the status of your project application via IMIS in the **Email Log** section.