INTERREG

User Manual of the

INTERREG+ Application Module

for the applicants of the

Interreg VI-A IPA Hungary – Serbia programme (2021 – 2027)

to submit full applications

0.1.0

Good neighbours
creating
common future

CONTENTS

1. HOW TO USE THIS MANUAL?

The main objective of this manual is to provide instructions to the applicants of the Interreg VI-A IPA Hungary – Serbia programme (2021 – 2027) on how to use the INTERREG+ system. The applicants are the Front Office users of the system. Applications have to be prepared and submitted electronically through INTERREG+ Application Module (hereinafter Application Module).

This manual

- **describes the method of completion and submission of applications** under **CfP ID: HUSRB/25R and HUSRB/25S,** and
- provides practical tips and technical information concerning the online data entry.

Please note that in the 2021-2027 programming period the Programme uses the one-step procedure for small scale projects (SSP) and regular scale projects (RSP):

Applications are evaluated and selected for funding on the basis of one single application (application form and annexes / supporting documents) against the pre-defined formal and quality assessment grids in one single round.

Before you start filling in your application:

- read carefully the Guidelines for Applicants and its annexes of the relevant Call for Proposals in which you plan to submit an application
- get familiar with the Interreg VI-A IPA Hungary – Serbia programme (2021 – 2027), which is available on the programme's official website
- make sure that your computer meets all the technical requirements as described in the following chapter (2 - Technical Instructions)
- read carefully the content of this manual and get familiar with the screen structure and system logic.

When filling in your application, please always consult the manual's relevant chapters in parallel.

2. TECHNICAL INSTRUCTIONS

2.1 Technical requirements

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

To use the Application Module, your computer needs to meet the following technical requirements:

The INTERREG+ IT system can be accessed by using any web browser, for best performance the recommended browsers are:

Software	Option 1	Option 2
Webbrowser	Google Chrome 88 +	Mozilla Firefox 85 +

To use the INTERREG+ IT system, you must enable javascript running. This feature is available in all supported browsers. However, it can be disabled. Before attempting logging in, make sure that javascript is enabled in your browser.

By using the https protocol, it is to ensure that the data transfer is secure between the user's device and the INTERREG+ IT system, and the user's data may not be disclosed by a third party. For maximum security, the user should pay attention to the following:

a) always enter the https:// prefix when entering the path; save the FO/BO in your browser bookmark with this prefix;

b) when the website is opened, the browser cannot display a warning window. If yes, its presumed cause:

- using a non-supported browser;
- using a web content filter in the network used by the user;
- attack attempt.

If you have a warning window, do not log in. Have your machine checked with your system administrator or IT specialist.

Open the Front office search path with caution because a malicious third party may mislead you. To avoid misuse, check in the top line of the browser before logging in to verify that the link starts with https://.

After first sign-up the acceptance of the User Policy is a condition, which must be fulfilled for using the system. Upon acceptance, the user can enter to the Front office site. It is recommended to read all the documentation, review relevant training materials and INTERREG+ User Manuals, if necessary, in order to use the application effectively and with due diligence.

The user must use the INTERREG+ IT system as intended, as listed in the previous section. For IT security and data protection reasons, the INTERREG+ IT system automatically breaks the connection to the server after 30 minutes of inactivity, resulting in loss of unsaved data. Use the logout button to securely leave the INTERREG+ IT system, quitting insecurely may lead to misuse user's data.

2.2 General terms of use

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

- If you have been inactive for more than 30 minutes (no data recording, no clicks, etc. occur within this time), the system automatically interrupts the communication between the client and the server computer, and a warning message is displayed.

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

3. HOW TO ACCESS THE SYSTEM?

3.1 Registration

The applicant who wishes to submit an application to the Interreg VI-A IPA Hungary – Serbia programme (2021 – 2027) shall first register in the INTERREG+ IT system. The system can be accessed by clicking on the following link below:

https://husrb.interregplus.eu/21-27

Users who have had access to the INTERREG+ IT system in the 2014-2020 programming period, under the below listed programmes, do not have to re-register, they can use their users in the system developed for the 2021-2027 programming period:

- Interreg V-A Hungary-Croatia Co-operation Programme 2014-2020
- Hungary-Slovakia-Romania-Ukraine ENI CBC Programme 2014-2020
- Interreg–IPA Cross-border Cooperation Programme Hungary–Serbia
- Interreg V-A Slovakia-Hungary Cooperation Programme

Note that the choice of the access site for user registration does not limit Front Office user access to other Programmes.

3.2 General remarks on user management

The INTERREG+ IT system identifies and authenticates the user by the unique username and password combination. To log in into the system, the username must be unique as the system uses a one-step authentication only. Besides the username, the system requires a unique e-mail address, as well.

The INTERREG+ IT system uses a so-called user-account solution for user management. The user account offers the possibility to assign multiple roles/rights to the same user in different programmes.

Therefore, before registering, we advise you to consider the tasks, roles, and rights the user would be entitled to and chose the username accordingly.

Rules of username choice:
- the username must be unique – a username can be registered only once in the system;
- only alphanumerical characters (i.e. letters and numbers) can be used – special characters are forbidden.

Rules of password choice:
- alphanumerical and special characters are allowed;
- the password must be at least 8 characters long;
- the password must contain at least a digit (i.e. 1, 2, 3, etc.), a capital letter (i.e. A, B, C, etc.) and a special character (i.e. *, ?, !, etc.).

*In case of a forgotten password, the password can be reset by clicking on the **Forgot Password?** button on the login window. The system sends an e-mail to the user e-mail address with the instructions to follow.*

3.3 The process of user registration

Upon accessing the appropriate website (https://husrb.interregplus.eu/21-27), the user should click on the **Register** button on the opening login screen.

Figure 1: Login screen of the INTERREG+ IT system

Figure 2: Registration screen of the INTERREG+ IT system

After filling in all the required fields, submit your data by clicking on the **Register** button at the bottom.

Upon successful registration, the system would ask for the e-mail address verification. Please check the mailbox belonging to the e-mail address provided at the registration and verify your e-mail address by clicking on the link provided in the e-mail sent by the system.

As the verification e-mail sent by the system contains a link, based on the settings of your local e-mail client, *the verification e-mail may be automatically directed to your spam folder or even to the deleted*

items folder. Therefore, please check your settings before registering to the INTERREG+ IT system. If needed contact your local IT professional.

Upon successful e-mail verification, the system would automatically log in your new User; your User Registration process is successfully done; and the user is created in the INTERREG+ IT system.

3.4 Menu structure

Once you have managed to log in, the entry screen opens:

Figure 3: Entry screen of the INTERREG+ IT system

The icon on the top left corner of the screen (circled with green) opens the Menu on the left side of the screen with a blue background. There you can find the **Application** menu point.
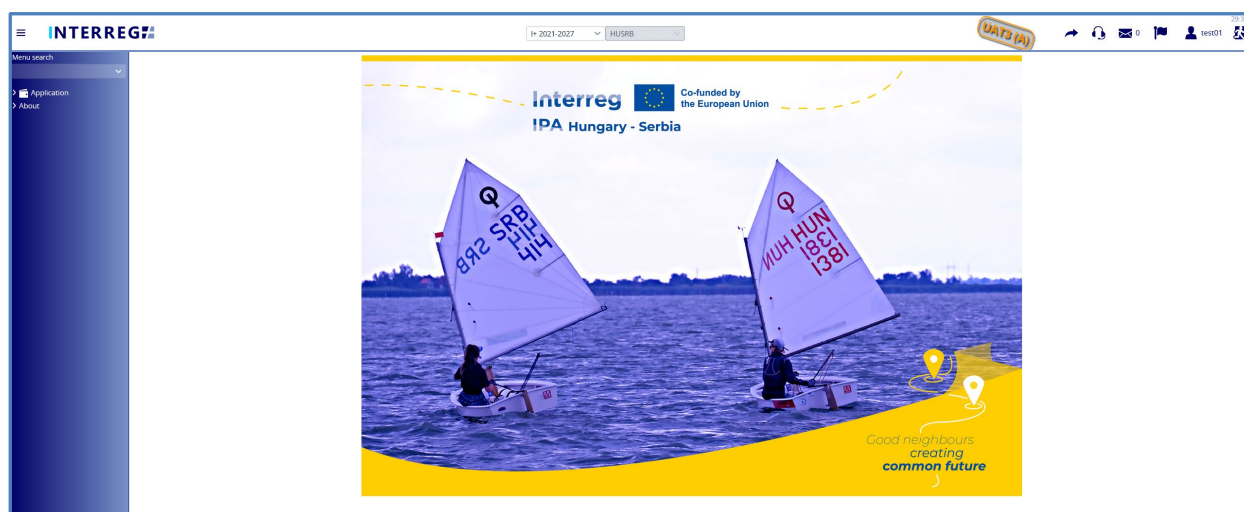
Figure 4: Menu / Application menu point

Users, who have also had access to the INTERREG + IT system developed for the 2014-2020 period can even navigate between the two systems designed for the 2014-2020 period and for the 2021-2027 period

by either clicking on the **Arrow** button highlighted by green in the top right corner of the screen or by selecting the appropriate period from the drop-down menu:
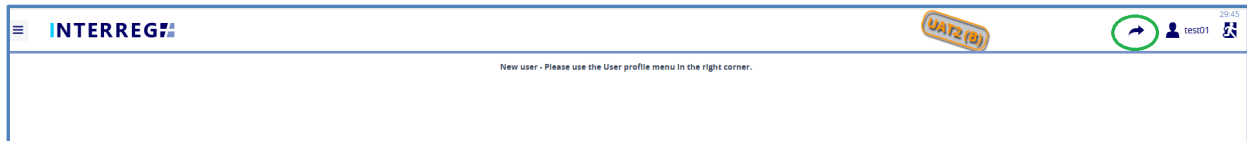
Figure 5: Navigation between INTERREG+ 2014-2020 and INTERREG+ 2021-2027

Figure 6: Navigation between INTERREG+ 2021-2027 and INTERREG+ 2014-2020

3.5 Types of fields in the system

The INTERREG+ IT system uses three types of fields with different methods of use: *action buttons*, which are activated by a single click; *editable cells* that are to be filled in with text, and *drop-down menus* with list of options, which are triggered by a down arrow icon.

3.5.1 The 'action' buttons

The purpose of „action buttons" is to manage the application under preparation. Those buttons can be found at the bottom of the screen, and they are always visible:
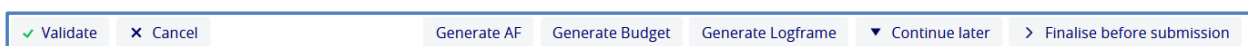
Figure 7: Action buttons

- When the user presses the **Validate** button, the system runs a validation, whether all the required fields have been filled in and all 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 the top centre of the screen. If all mandatory fields are filled in and all rules are complied with, a confirming message would appear.

- By clicking on the **Cancel** button, all recorded and unsaved data will be lost, and the application returns to the last saved state.

- By pressing the **Generate …** buttons, depending which button was pressed, the user can download *the draft version of the application form, the budget or the logframe* any time during the filling-in process. The only pre-condition is to fill in some minimum data in the Header (acronym, duration and start of project) and the basic data of the lead applicant. **This is a helpful tool highly suggested for the applicants to be used for checking the project logic.**

- To save the recorded data and leave the application (close the window) click **Continue later**. By doing so, all data will be saved with no validation running. (The user can return to the application from the application list screen by clicking the **Continue button** after selecting the application in question.)

- By pressing the **Finalise before submission** 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 submission step, where the application is no longer editable and the documents are generated.

3.5.1 The 'function buttons

The so-called function buttons are those, which always call the same functions. **Please note:** these buttons are in most of the cases inactive up until an item is selected, i.e. the buttons are only active after the user clicked on an item.

- With the use of (+) **Add** button can the user create new items on list screens (e.g. outcome, activity, indicator);

- the ( ) **View** button initiates the viewing of a selected item (e.g. outcome, activity, indicator, etc.) from the list;

- the ( ) **Modify** button initiates the modification of an already existing item (e.g. an activity, indicator description, etc.);

- the ( ) **Delete** button deletes the selected item. Note, if an item is deleted it can no longer be restored;

- the (W X) **Export to** buttons initiate exporting the content of the list screen into the selected format (xlsx, docx, pdf). Note that the function would export 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 (i) info button the details of a field can be viewed.

- 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;

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- the (📥) **Download** and the (📥) **Download as zip** button allows downloading even multiple selected files from the list at once;

4. HOW TO PREPARE YOUR APPLICATION?

4.1 Creating a new application

The INTERREG+ Application Module is designed for potential lead partners to submit their applications. The steps to create an application are summarised in the figure below:
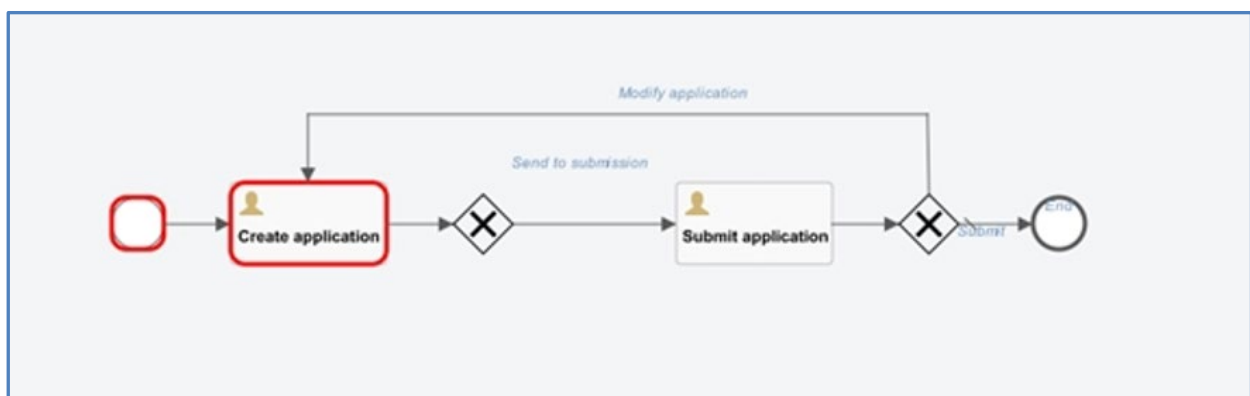
Figure 8: Application submission workflow

The process can be started from the **Application list** screen by pressing the (+) button. Each user will only see the applications that he/she has started to record. The same user may submit more applications through the INTERREG+ IT system.

Figure 9: Application list

Click on the (+) button to display the form below:

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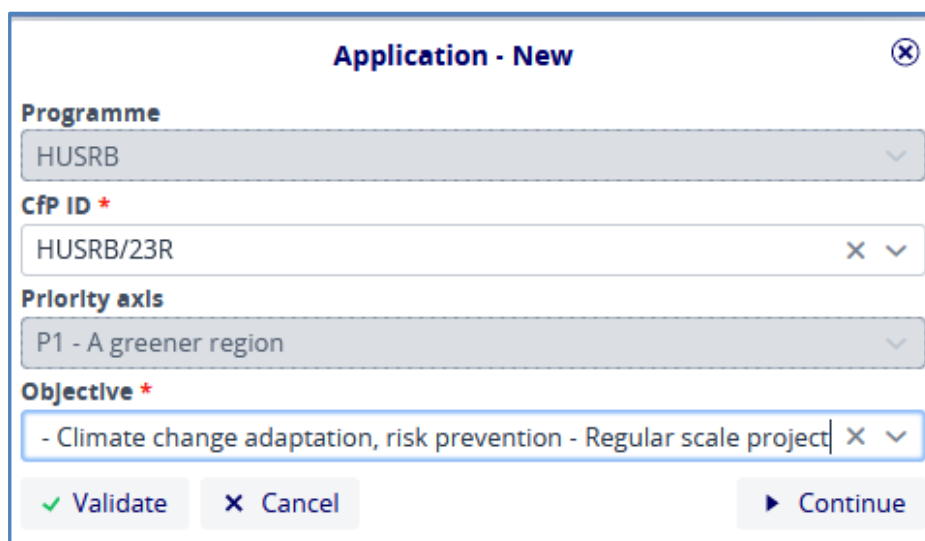
Figure 10: Application – New

From this interface, the user selects the relevant data from the drop-down lists and then clicks Continue to start the recording process. The Priority axis field is automatically filled in. If **Validate** is pressed, the data is checked by the system to ensure that it is correct. However, if **Cancel** is pressed, the recording process is dropped, and the data is not saved.

Please carefully select the ID of the call for proposals from the drop-down list of the 'CfP ID' for which you would like to submit an application. Careful selection of 'CfP ID' is necessary since it determines the project scale you are applying for, and it **cannot be modified later**. For details, please check chapter 1.2 of the Guidelines for Applicants (GfA).

4.2 Structure of the application

If users are recording a new application by clicking on **Continue** in the pop-up window 'Application – New', the initial step will display the following window:
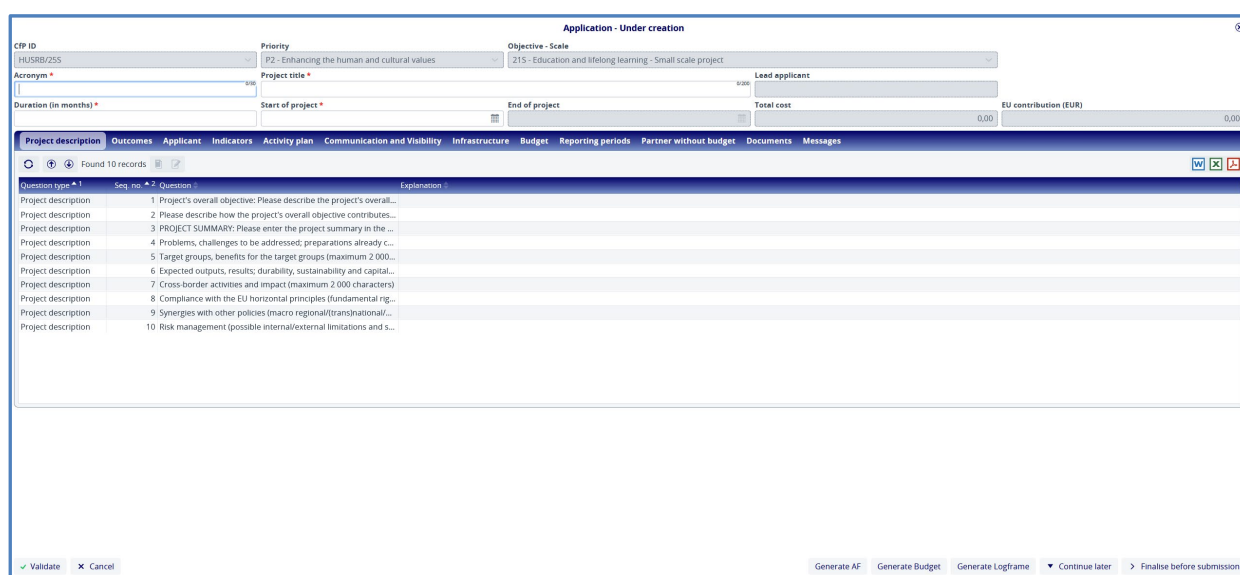
Figure 11: **Application – Under creation**

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Here users can start entering the details of their application. Fields marked with an asterisk (*) are mandatory, while those with a grey background are filled in by the system automatically. At this step, until the user presses the **Finalise before submission** button, the status of the application is **Under creation**. It is possible to pause the recording by pressing the **Continue later** button. In this case, the recorded data of the application under creation will be saved and can be resumed later by selecting it from the Application list and clicking on **Continue**. The **Validate** button is to check, whether the recorded data meets the requirements and the **Cancel** button closes the form without saving.

Practical notes:

- The application consists of several sheets (the functioning of all sheets is described in details in this manual) among of which you can navigate by clicking on the names of the different sheets.
- It is strongly advised to start the completion of the Application Form by filling in the sheets in the set order (i.e. Main data, Outcomes, Applicant, etc.), since some of the entered data (e.g. abbreviated name of the applicant, role of the applicant, etc.) will be automatically transferred and used in other sheets.
- Some sheets of the application are long and consequently might not fit into the screen of your computer. Please always make sure that you filled in all fields of the sheet by scrolling down to the bottom.

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

4.3 Main data of the application

Figure 12: Application / Header

In the upper part of the form, users will find the so-called header data, such as Application ID, Acronym, Lead applicant, etc. Fields marked with an asterisk (*****) are mandatory, while those marked with a grey background are filled in by the system. The data in the header section will be saved if the user exits the recording by clicking **Continue later**. On returning to the process, the data recorded will be found in the header section. This will not happen if users exit with **Cancel**.

4.4 Project description sheet

Figure 13: Project description

In the Project description sheet users have the option to fill in answers to the questions, which they can do by clicking on the **Modify** ( ) button. The **Modify** button or the **View** ( ) button will be active only in case any of the questions on the list is selected. This means that, in order to type an answer to the question, the user needs first to click on the respective question and then on **Modify** button. The **View** button is to be used in the same way.

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Figure 14: Project description - Modify

The recorded answers are saved by pressing the **Save** button.

Please note that you have to provide more information about the project in later chapters of the application form, and those must be coherent with the answers to these questions. Therefore, you are advised to answer (or revisit) this question after the entire application form is filled in.

The following 10 questions shall be answered in the Project description sheet:

Project's overall objective – Please describe the project's overall objective in the field below (maximum characters: 500): The overall objectives should be simple, measurable, realistic and time wise achievable. It is important to reflect on the connection of the project's objective to programme's objectives (please consult chapter 1.3 of the GfA) and the cross-border character as well.

Please describe how the project's overall objective contributes to the programme specific objective (max. 2000 characters): Please explain how the achievement of the proposed objectives, through the realization of the main activities of the project, are contributing to the specific objectives of the programme.

Project summary: Please enter the project summary in the below cell (max. 3000 characters)**:** Please give a concise and comprehensive summary of the project including expected project objectives, outcomes and the main activities of the project. Briefly describe the location and the duration of the project, specify the main target groups benefiting from the project. Indicate the expected and most important outputs to be realized and results to be achieved. Highlight the cross-border character and the impact of the proposed project.

Problems, challenges to be addressed; preparations already carried out (max. 2000 characters): Justify the necessity of the project. Describe the problems with cross-border nature to be resolved and needs to be met, relating to the target area and/or group of people. The conclusions of already elaborated surveys on the subject can be referred to in order to prove the relevance of the project. What steps have already been taken (e.g. previous projects) to prepare the implementation of this project.

Target groups, benefits for the target groups (max. 2000 characters): Identify the target groups directly and indirectly benefiting from the project. Explain why they are the ones whose needs are addressed and describe circumstances you want to change by implementing your project idea.

Expected outputs, results; durability, sustainability and capitalization of results (max. 2000 characters): Clearly define and describe the planned outputs (tangible goods, services, infrastructure, etc.), the expected outcomes/results and their durability. They have to be in coherence with the selected/defined indicators. Describe how the professional, financial and institutional sustainability of the project outputs and results will be assured.

Cross-border activities and impact (max. 2000 characters): Please specify cross-border activities and demonstrate measurable impacts that will be generated by the project on both sides of the border. Explain the long lasting cross-border social / economical / environmental effects, directly linked to the implemented project.

Compliance with the EU horizontal principles (fundamental rights; equality between men and women, gender mainstreaming; non-discrimination and sustainable development). Explain how the project contributes to the horizontal principle(s). (max. 3000 characters): Please describe how your project respects the Programme's horizontal and other principles, which are described in chapter 7 of the GfA. Explain if the project will have positive impact on any horizontal principle(s).

Synergies with other policies (macro regional/(trans)national/micro regional/county level), programmes and projects (max. 2000 characters): Please list and explain the synergies of your project proposal with other EU funded projects or other development initiatives in the relevant field located in the geographical vicinity that are finished or being implemented.

Risk management (possible internal/external limitations and solutions foreseen) (max. 2000 characters): Describe the possible risk factors (e.g. economic, financial, social, cultural, environmental, organizational, etc.) the project might face during and after project implementation. Assess their probability, their impact on the project activities in case of emergence and the measures to handle them.

4.5 Outcomes sheet

Figure 15: Outcomes

Activities related to the application can be recorded on this screen. Activities should be grouped in such a way that each group leads to an outcome, which will be measured by the indicator you select/define on the **Indicator** sheet. Therefore, each activity must be necessary and purposeful so that each group of activities is logically coherent and leads to the expected outcome. The outcome, on the other hand, must be tangible and measurable, which will be proved by its indicator.

On the **Outcome** list screen, you will find the compulsory *'Managed project with completed communication activities'* as a predefined outcome. By using the **Add** (+) button you are able to add new outcomes; by clicking on the **Modify** (✎) button (it is only active in case you select an item from the list by clicking on it) you can give/edit description to the activities.

4.5.1 Predefined outcome and activities

By default setting, as outcome 0 the *'Managed project with completed communication activities'* is listed on the outcome list. First you need to select this outcome by clicking on it and then by clicking on the **Modify** (✎) button you shall give a description to the predefined activities (*Communication* and *Project management*).

Figure 16: Outcomes / Predefined activities

The entered data are saved by pressing the **Save** button.

4.5.2 Recording outcomes and activities

To record your planned outcomes and the relating activities you shall use the **Add** (+) button and fill in the **Activities - New** pop-up window. As a general rule, the user can add maximum four outcomes (besides the existing predefined outcome).

Figure 17: Outcomes / Recording outcomes

When pressing the **Record activities** button the entered data are saved and another pop-up window called **Activities – Modify** opens automatically, where the planned activities grouped under the respective outcome can be added. Maximum five activities can be added under each outcome.

Figure 18: Outcomes / Recording activities

The list of activities is empty by default. By clicking on the **Add** (+) button the user can enter data of the respecting activity in the opening **Outcomes/Activity** form.

Figure 19: Outcomes / Activities - New

On the form, fields marked with (*) are mandatory. The data is saved by pressing the **Save** button.

The following cells shall be filled in:

Activity name (max. 200 characters): Please give the name of the planned activity. The name should be short and clearly refer to the content of the activity.

Activity description (max. 2000 characters): Please give a detailed description of the essence of the planned activity (answering clearly the following questions: who, when, what). In addition, please also describe why each activity is necessary to achieve the corresponding project outcome.

Exact location (max 150 character): Identify the exact geographical location of the planned activity as precisely as possible (settlement, address, topographical number etc.).

4.5.3 Indicators sub-sheet

Figure 20: Outcomes / Indicators

Indicators tab is not editable here; it will only display information on indicators of the applicable outcome once it was recorded on the **Indicator** sheet of the application form.

4.6 Applicant sheet

All details about the applicant shall be added on the Applicant sheet by pressing the (+) button above the list, which is empty by default.

Figure 21: Applicant – Add

4.6.1 Entering applicants' data

After pressing the (+) button, the following form will appear:

Figure 22: Applicant – New

In this sheet the user enters the data about the applicant by filling in the fields. Fields marked with an asterisk (*) are mandatory. By clicking on the 2 checkboxes in the bottom section of the Address section, the data in the **Official address** tab can be copied to the **Branch office address** and **Mailing address** sections. In case these data are not the same, users can enter a different address on the tabs separately. Filling in the data on each sub-tab is compulsory. Data of the applicant can be saved only after all mandatory fields are filled in.

In **Budget type** field, you can select from Budget type A and Budget type B from a drop-down menu (for details please consult the Eligibility of Expenditures, the Annex III of the CfP package):

Figure 23: Applicant – Budget type

Please note: you can change the type of the budget any time during the application recording process. However, the recorded budget items will be lost, and you need to restart the recording of your budget.

Once all data of the applicant has been recorded, clicking on **Save** will save the data and make it available for viewing in the **Applicant list** view. The maximum number of applicants is five in addition to the Lead applicant. Moreover, the partnership must contain at least one partner from each side of the border. However, it is advised to keep the number of partners reasonably low in order to assure efficient coordination of the project implementation.

Important note: once an applicant is saved on the **Applicant list** further information will be requested from the user. However, these sub-sheets under the applicant will be available for entering data and edit only after the applicant's main data has been entered and saved. Once the applicant is listed in the

Applicant list view, the user can modify it and enter further data by clicking on the **Modify** (🖉) button after selecting it from the list.

Figure 25: Applicant – Modify

When opening any of the applicants from the list for editing the following sub-sheets will be available: **Contacts**, **Budget, Financial capacity, Management experience** and **Questions**.

4.6.2   Contacts sub-sheet

Users shall add contact information in the Applicant / Contact tab by pressing the add (➕) button.

Figure 26: Applicant / Contacts – Add

Once users have started the process, the following form appears:

Figure 27: Applicant / Contacts – New

The serial number (**Seq. No**) is filled in automatically by the system. All other fields marked with an asterisk (*) are mandatory. From the drop-down menu multiple options can be chosen for **Contact type**, i.e. for the same person both contact person and legal representative statuses can be chosen. However, it is a must to add one contact person and at least one legal representative, otherwise the validation

check before submission runs to an error. Pressing the **Save** button allows the user to record the data entered.

4.6.3 Applicant budget sub-sheet

This is the sheet where the budget for the applicant is recorded. The arrows allow users to change the view. Pressing the ⟩⟩ button closes all the rows and only shows the budget headings, Pressing the ⟨⟨ button opens budget headings and showing budget lines and budget items. Budget lines can be opened or closed one by one using the arrows at the beginning of the budget lines.

Depending on the choice of the applicant (selected from the drop-down on the main data of the applicant) the budget will be displayed and calculated according to budget type A or budget type B (for details please consult Eligibility of Expenditures, the Annex III of the CfP package).

In case of real cost calculation, the budget items can be added to a specific budget line by pressing the **Add** (+) button.

Figure 28: Applicant / Budget – Add item

After pressing the add button, the following screen appears:

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Figure 29: Applicant / Applicant Budget – New

Budget line, **Budget Item ID** and **Item category** are filled in by the system. Fields marked with an asterisk (*) are mandatory. The value of the **Costs (In EUR)** field is automatically calculated by the system by multiplying the values of the **# of units** and **Unit rate (in EUR)** fields. Pressing the **Save** button will save the recorded data.

Figure 30: Applicant / Budget – Budget item

Here users see the item recorded above (4.1.1). The items are cumulated at the budget line level and the budget lines at the budget heading level. They are summed up at the bottom of the budget table and the row of the total amount is highlighted by blue.

Important notes:

- For calculation rules applied to the applicant's budget please consult the Eligibility of Expenditures, the Annex III of the CfP package!
- In case of choosing Budget type A, do not forget to add the communication package under budget item 4.6.1. The same applies for work package (if relevant) which shall be entered under budget item 4.6.2.

- **If Additional (optional) communication tools are planned, those can be added under budget item 4.6.3 and under subsequent budget items.** These items can be added as any other budget items by clicking on budget line 4.6 and pressing the **Add** (➕) button and filling in the pop-up window.

4.6.3.1   Applicant budget / Source of Funding

Financial sources of the application are automatically allocated and displayed by the system in line with rules explained in the CfP (please see chapter 8 of the GfA). It is not possible to edit them; it is available only for information purposes.

Figure 31: Applicant / Budget / Source of founding

4.6.3.2   Applicant budget / Payment forecast

In the **Payment forecast** tab, the budgeted amounts shall be broken down by reporting periods.

Figure 32: Applicant / Budget / Payment forecast

The system dynamically totals the amounts continuously recorded by the user in the **Total (EUR)** column and indicates the difference to the **Total cost (EUR)** in the **Difference (EUR)** column. By pressing the **Save**

button in the bottom left corner, the recorded data is saved. The EU contribution table for the payment forecast is filled in automatically by the system in parallel with recording the data in the upper table.

4.6.4 Financial capacity

This tab is to record the human resource and financial data of the applicant. There is no validation check on the fields, i.e. the application can also be submitted even if this sheet is left empty (since in special cases these data are not available). However, during the quality assessment these are important aspects, therefore it is highly recommended to fill in this sheet if data are available.

Figure 33: Applicant / Financial capacity

4.6.5 Management experience

Management experience of the applicant can be entered by pressing the **Add** (+) button. It is compulsory to add at least one item per each applicant.

Figure 34: Applicant / Management experience

After pressing the add button, the following screen appears:

Figure 35: Applicant / Management experience – New

4.6.6 Questions - Partnership

On **Applicant / Questions** tab applicants can give details on their partnership.

Figure 36: Applicant / Questions

The following two questions shall be answered on this sheet:

Professional experience: Please explain how the core activities of the partner is connected to the present project idea (e.g. previous activities in the field, cooperation with different domestic/foreign organisations in the field, internal staff with professional expertise in the field, etc.) (max. 2000 characters).

Operational capacity: How does the partner plans to implement the management - direct project management and financial management and communication activities? Internal or external project management (or both) and why? (max. 2000 characters).

4.7 Budget sheet

The **Budget** sheet displays the budget as a summary. This screen is only for view purposes; it cannot be edited.

Figure 37: Budget / Budget

4.7.1 Budget / Source of funding

The **Budget / Sources of funding** tab displays the financial sources automatically allocated by the system in line with rules explained in the CfP (please see chapter 8 of the GfA). It is not possible to edit them; it is available only for information purposes.

Figure 38: Budget / Source of Founding

4.7.2 Budget / EU contribution advance

The **Budget / EU contribution advance** tab displays the expected EU contribution advance per applicant. Users can only view the information; no changes can be made on this screen.

Figure 39: Budget / EU contribution advance

4.7.3 Budget / Payment forecast

The **Budget / Payment forecast** tab displays the payment forecasts that have been recorded for the applicants under the Applicant / Budget – Payment forecast sub-sheet. Therefore, users can only view the forecasts here; no changes can be made on this sub-sheet.

Figure 40: Budget / Payment Forecast

4.7.4   Budget / Project team

In case the budget type B is chosen for any of the applicants on the **Budget / Project team** sub-sheet the user has to add the names and estimated share of working time for each team member.

Figure 41: Budget / Project team – List view

Team members are listed automatically by the system on the screen based on the data the user entered in the respective applicant's budget. Data shall be entered by pressing the **Modify** ( ) button. Fields marked with an asterisk (*) are mandatory.

Figure 42: Budget / Project team – New

By pressing the **Save** button; the recorded data will be saved. The items of the list can be viewed ( ) or modified ( ).

4.8 Indicators sheet

On the Indicators sheet the user can record the indicators by clicking on the **Add** (+) button.

Figure 43: Indicators

After clicking on the **Add** (![+]) button, the following form will be displayed and shall be filled in by the user.

Please note that in order to fill in this chapter correctly all applicants of the partnership must thoroughly read chapters 5 and 6 of the GfA and Annex IV (Indicator guide) of the CfP!

Figure 44: Indicators - New

Fields marked with an asterisk (*) are compulsory. Where a drop-down list appears in the field, the user has to choose from the drop-down items.

The recorded items will be visible in a list view, where the user can **View (** ![] **)**, **Modify (** ![]) or even **Delete (** ![]) them.

Figure 45: Indicators – List view

Important rules:

- The user has to define/select to each outcome minimum 1 and maximum 2 indicators regardless of the type of the indicator.
- There is a pair of programme level indicator, which is a must for each partnership to select for the pre-defined outcome: Organisations cooperating across the borders (RCO87) and Organisations cooperation across borders after project completion (RCR84). These indicators should be linked with Outcome no. 0 (Managed project with completed communication activities).
- In case the output programme level indictor has a result pair, which is compulsory to select by the partnership, the system automatically adds this 'result pair indicator' to the list of indicators. However, it is the user who has to define base and target values and description to these types of indicators as well! In addition, please select the same outcome from the drop-down menu for both the output indicator and its result pair. Please pay attention that in case one of the paired indicators is deleted, the pair of it is not deleted automatically!
- After having filled in all necessary fields of Outcomes and Indicators sheets, please generate the Logframe document by pressing the **Create draft** button to double-check the project logic. For details, please consult chapter 5 of the GfA.

4.9 Activity plan sheet

Figure 46: Activity plan

In the **Activity plan** sheet the user can record when (in which reporting period) the partnership plans to implement the activities they recorded under the Outcomes sheet. The user has to select the appropriate reporting period in the row of the specific activity and click on the checkbox. If the user wants to check all the boxes in a row, this can be done quickly and conveniently by ticking the **All** checkbox at the beginning of the row. If the user wants to untick a checkbox, he/she has to click on it again to remove the tick.

The system checks whether each activity is selected by at least one partner and whether there is at least one activity selected to each reporting period.

4.10   Infrastructure sheet

If an Applicant plans expenditures on budget head 6 Infrastructure and works she/he needs to add at least one infrastructure element on the Infrastructure sheet by pressing the **Add** (+) button:

Figure 47: Infrastructure – New

The fields marked with (*) must be filled in as usual. If the field type is a drop-down menu, the user can choose item from the list.

Figure 48: Infrastructure

When all mandatory fields are filled, by pressing the **Save** button, the Location subtab also activates below the newly entered information on the infrastructure element.

On the Location tab, at least one Location record must be initiated by the **Add** (+) button. Without adding information on the location, the new infrastructure element cannot be saved. In the opening form, 'Lot number', 'Proof of property ownership', and 'Description' information must be provided.

Figure 49: New Location of an infrastructure element

When all mandatory fields are filled, by pressing the **Save** button the data is saved and will be visible in the list view. The items in the list can be viewed **( )**, modified ( ) and deleted ( ) by the user.

Figure 50: Infrastructure – List view

4.11 Communication and visibility sheet

For the obligatory communication and visibility activities the simplified costs option will be used by the progamme in the 2021-2027 programming period. It means that each applicant shall choose one package with pre-defined content and pre-defined cost (basic, medium, advanced and works package /if applicable/). Besides the obligatory packages, additional (optional) communication tools can be defined, if the content of the project requires this. (For details, please consult the Annex V (Visual identity manual) of the CfP.

Both types of communication and visibility activities can be added by pressing the **Add** ( ) button on the Communication and visibility tab. Afterwards, the following form will be displayed:

Figure 51: Communication and visibility – New

Fields marked by (*) are mandatory. The user shall either enter a text or choose an item from the available list. Applicant can choose from obligatory pre-defined tools and also can add new additional items.

If applicant chooses a pre-defined obligatory communication package the Communication tool and the description are filled in automatically and the justification and target groups field are inactive. The user needs to choose from the drop-down menu the responsible applicant. In addition, it is important that the system checks whether the chosen obligatory communication package and the planned expenditures under the relevant applicant's budget match. Therefore, the user shall crosscheck that the chosen communication package and the additional (optional) communication tools are in line with the data entered in their partner budget, if they chose the Budget type A.

Figure 52: Communication and visibility – Predefined tool

If applicant chooses optional communication tools, she/he needs to fill in the relevant fields.

Figure 53: Communication and visibility – Optional tool

The entered data are saved by pressing the **Save** button. The data can be found in the list. The items in the list can be viewed **( )**, modified ( ) and deleted ( ) by the user.

Figure 54: Communication and visibility – List view

4.12   Partner without budget sheet

Applicant can add partner without financial support to the application on **Partner without budget** sheet by clicking on the **Add** ( ) button. For partners recorded on this tab the user can select activities they contribute to. However, this type of partners cannot contribute to e.g. indicators, communication and visibility activities, etc.

Figure 55: Partner without budget

The user can first record the data of partner without financial support.

Figure 56: Partner without budget – Partner data

After recording a partner's data, the user can choose from the list of activities previously recorded on the Outcomes sheet and give a description on the contribution of the partner to the selected activity by clicking on **Continue record** data button.

Figure 57: Partner without budget – recording activities

By clicking on **Save** button data regarding the activities are saved and listed under the Partner without budget – Activities sub-sheet.

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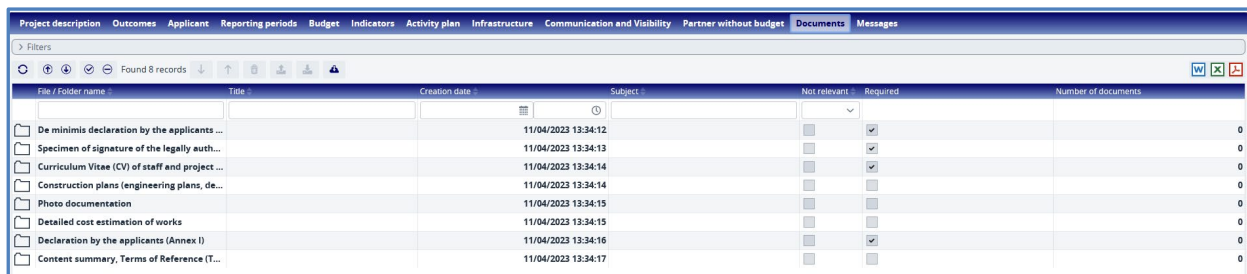
Figure 58: Partner without budget – Activities – list view

When all activities are added to the partner without budget by clicking on the **Save** button the newly recorded partner will be listed on the list screen of Partner without budget. The items in the list can be viewed **(📄)**, modified (✏) and deleted (🗑) by the user.

4.13 Documents sheet

Users shall upload all the necessary supporting documents to the application on the **Documents** sheet.
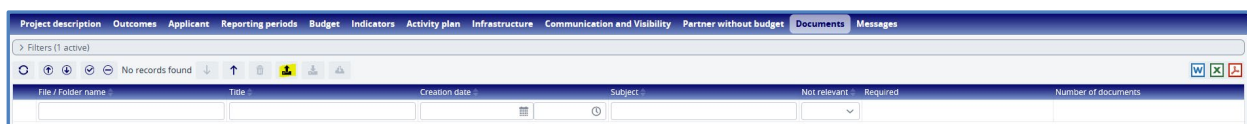
Folders can be selected and opened by double-clicking on the name of the folder or by clicking on the **Down arrow** (↓) button after selecting a folder from the list. In case the **Required** column is ticked for one folder, the system runs a validation check before submission whether there is at least one document uploaded to that specific folder.

Figure 59: Documents

When opening a folder the following screen appears:

Figure 60: Documents - Go up / Upload document

The **Up arrow** (↑) on the left shall be used to move up in the folder structure (e.g. to return to the list of folders), and the **Upload button** (⬆) shall be used to start the upload. **Document upload can be**

initiated only after entering a folder. The upload panel will appear, where you can choose files which you want to upload, or you can use "drag and drop" technique to upload files.
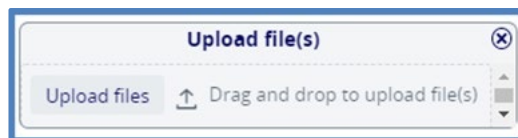
Figure 61: Documents – Upload file(s)

When the upload is complete, the file will appear in the list view of the folder.
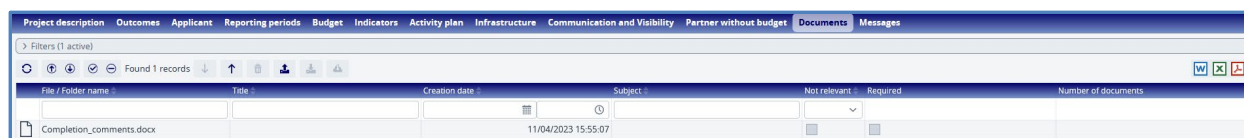
Figure 62: Documents – List view

It is not possible to upload 2 files with the same name to the same folder. The maximum size of a document that can be uploaded is 50 MB per document.

4.14   Messages sheet

Messages sent by the system to the user's e-mail account are also stored and listed on the **Messages** sheet. This list is empty by default.

Figure 63: Documents – List view

5.   HOW TO SUBMIT THE APPLICATION?

5.1 Steps of the submission process

If the front office user believes to have entered all the necessary data and uploaded all the required documents, he/she can check with the system whether the application fits all rules built in the system by pressing the **Validate** button in the bottom left corner. Users can then submit their application by clicking on the **Finalise before submission** button in the bottom right corner. The system will then automatically generate the necessary documents, i.e. the final application form, the budget and the logframe.

Please note that in case of any mistakes (missing data) error messages might pop up after pressing the **Validate / Finalise before submission** button. After completing the respective sheets with the missing data, error messages will disappear, and the application form can be submitted.

Figure 64: Finalise before submission

After pressing the **Finalise before submission** button, the system generates the necessary documents. If the user wishes to pause the process, he/she can do so by pressing the **Continue later** button. The process can be resumed by selecting the appropriate item from the **Application list view** and pressing **Continue**. If the user decides that a change is required, this can be done by pressing the **Modify application** button in the bottom right corner. The process will then return to the previous step. Here users will be able to modify the details of the application and, once the necessary changes have been made, users can restart the submission of the application by pressing the **Finalise before submission** button. The system will regenerate the documents with the updated data.

Figure 65: Submit

Finally, clicking on the **Submit** button will submit the application. If the submission is finished successfully, an information window appears in the top centre of the screen confirming the successful submission.
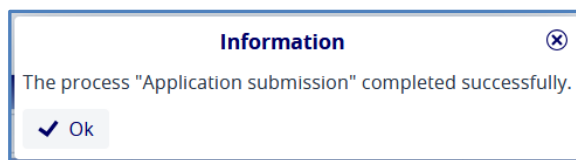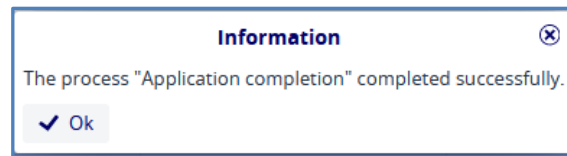
Figure 66: Confirmation of successful submission

In addition, the system sends an automatically generated e-mail on the successful submission to the user's e-mail address and the status of the application changes to **Submitted**.

Figure 67: Application list – submitted applications/LSP concept notes

6. HOW TO SUBMIT THE COMPLETION?

After the submission deadline, the applications submitted by the deadline will be evaluated against a pre-defined set of criteria included in the formal assessment grid, published in the Guidelines for Applicants.

If the application is not complete, i.e. any of the criteria listed in the formal evaluation grid are not satisfied, the lead partner is invited to submit a completion/clarification within maximum 10 calendar days from the date of receipt of the official notification. The request for formal completion of the application will be sent out from INTERREG+ IT system by e-mail and the applicants shall carry out the completion in the INTERREG+ IT system.

At moment the application is sent back to the front users for completion, the Completion tab automatically appears among the screens of the application. The deadline for completion and documents to be submitted are listed in the Completion tab.

Figure 68: Completion sheet

The deadline for completion and documents to be submitted are listed in the **Completion** tab.

Figure 69: Completion - View

When the completion request is sent out to the applicants, the status of the application in question changes to **Completion needed**. Upon logging in the system, the user has the possibility to submit the completion. After selecting the applicable application from the **Application list** view, the applicant can proceed with modifying its application by pressing the **Continue** button:

Figure 70: Proceeding with completion

Please note during the completion step only the requested documents can be uploaded to the **Completion** folder automatically listed by system on the **Documents** sheet. No other changes can be done on application.

Figure 71: Upload of documents

After finalizing the upload of requested documents, the user can resubmit the application by clicking on the **Submit** button.

Figure 72: Finalizing completion

If the submission is finished successfully, an information window appears in the top centre of the screen confirming the successful submission.

Figure 73: Confirmation message

In addition, the system sends an automatically generated e-mail on the successful submission to the user's e-mail address and the status of the application changes to **Submitted**.

FIGURES