How to make available your Report and Request for Reimbursement to your 1st level financial controller?

Specific situation for Ireland and Northern Ireland

The Programme's Platform for Collaborative Communication allows each partner, among other actions, to make their own Implementation Report and Request for Reimbursement available to their financial controller ("centralized" controller in the case of Ireland and Northern Ireland).
This facility undoubtedly helps to handle smoothly the process of certification of expenditures. This is possible through the creation and assignment of permissions by the Partner to his controller.

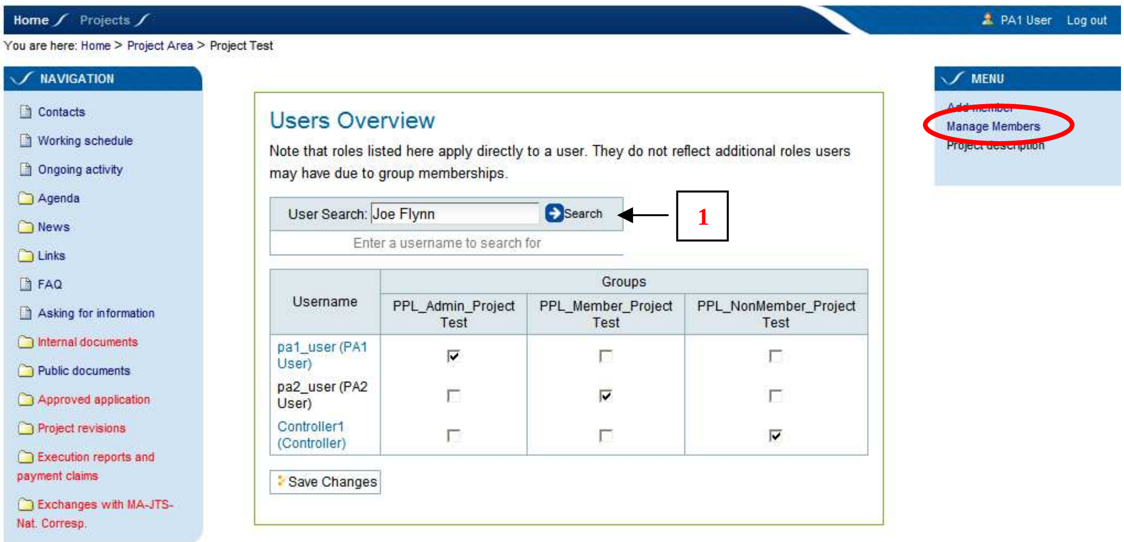
The steps are as follows:

1. The "centralized" controller is already registered in the "Projects" section of the website. The controllers names are:
   - Joe Flynn (for Ireland)
   - Helen Clarke (for Northern Ireland)

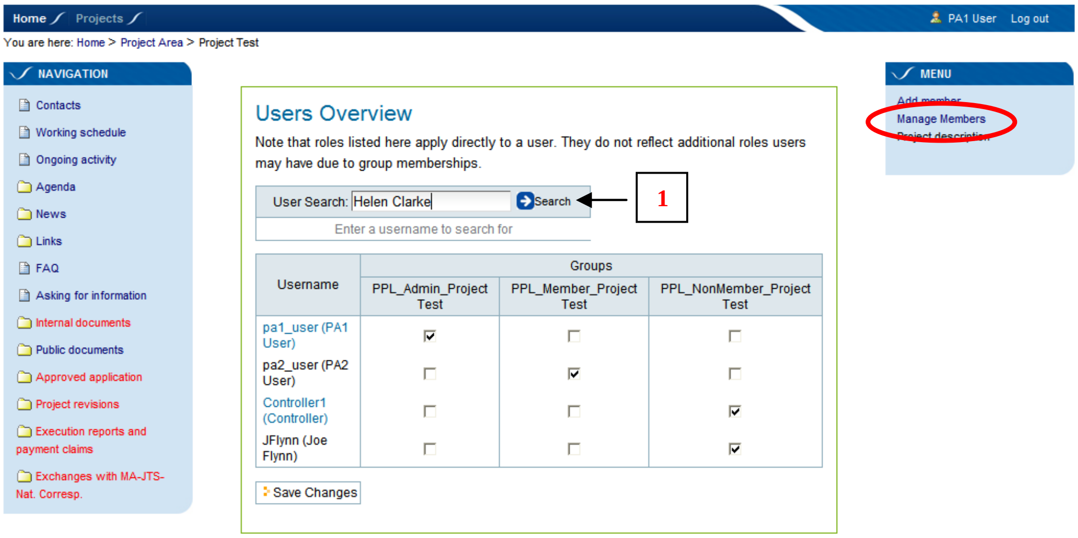
   The Lead Partner must add him/her to the "PPL_NonMembers_ <Project>" group.

First the Lead Partner chooses the "**Manage Members**" option, and then **searches** the name of Financial Controller.

IRISH Partner



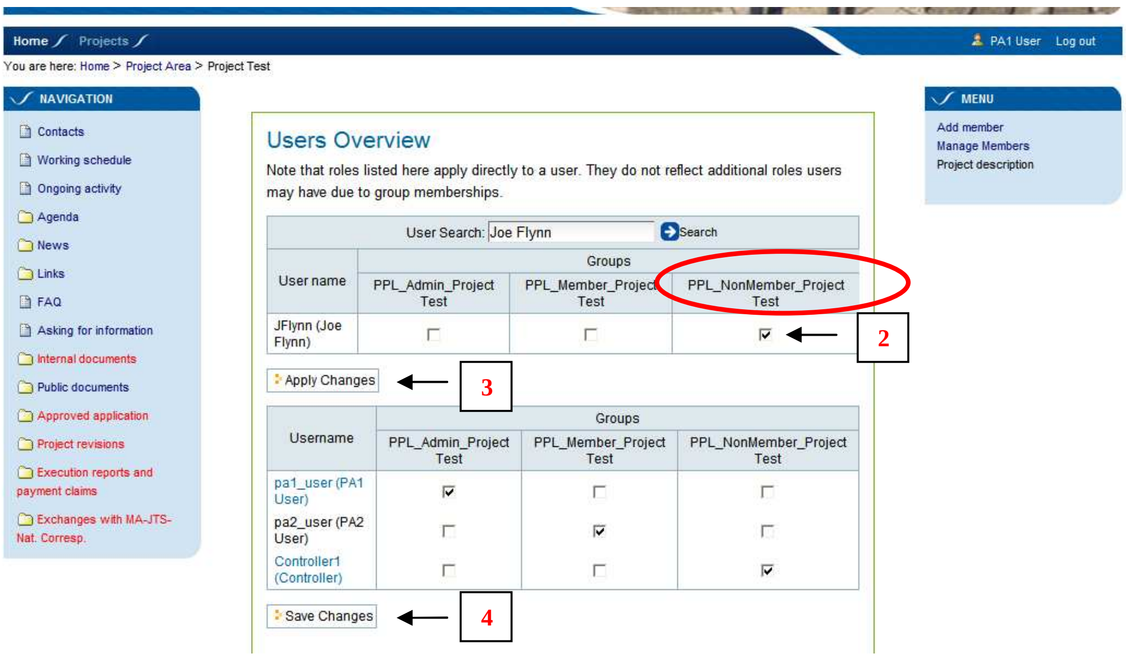
Northern Ireland partner



Secondly, the Lead Partner adds him/her to the group "PPL_NonMembers_ <Project>",

Clicks in "Apply changes" 3

"Save Changes". 4

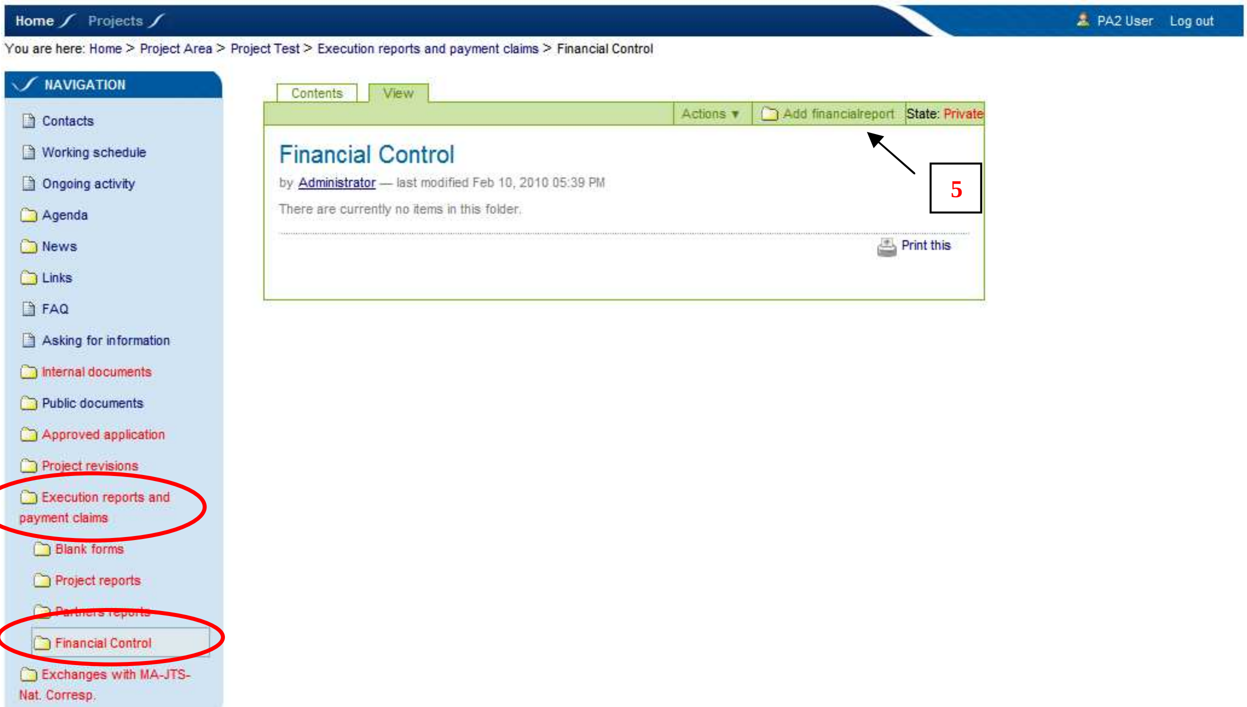


After the step 4, the Controller (Joe Flynn or Helen Clark) is now a "PPL_NonMember_Project".

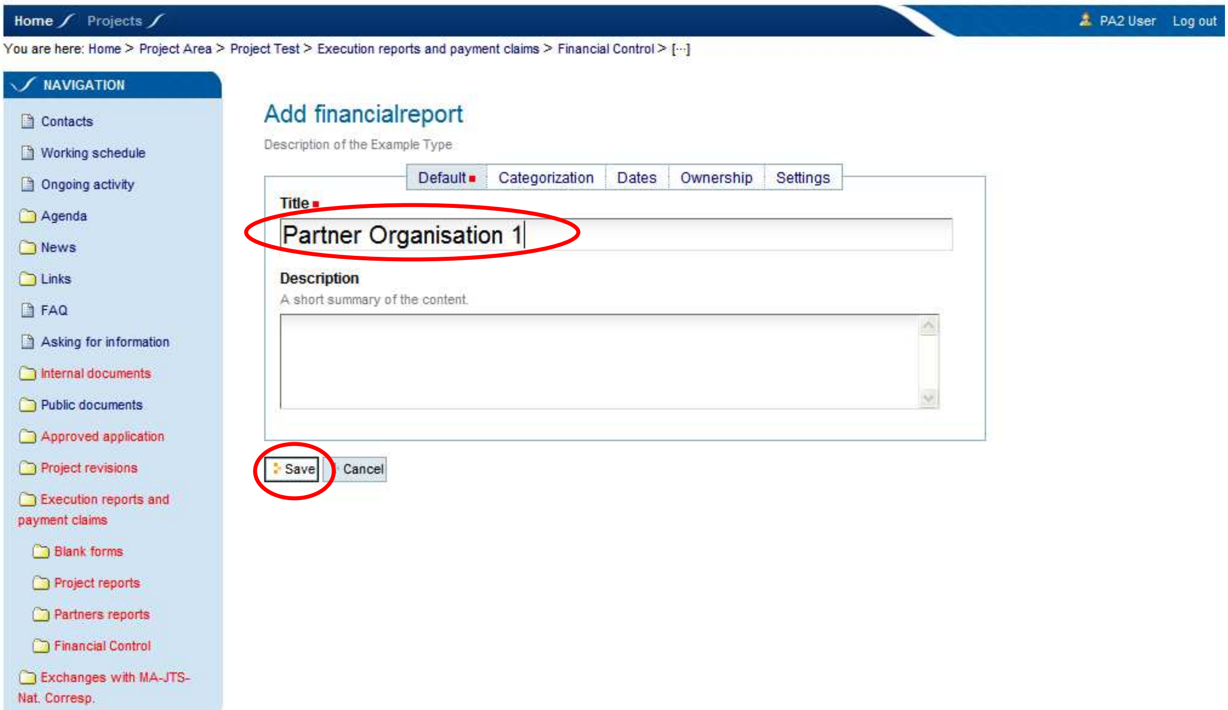
As a member of "PPL_NonMembers_ <Project>" group, the controller can view all **the project folders except the sections**: "Internal documents", "Project revisions", "Blank forms", "Project reports", "Partners reports" and "Exchanges with MA_JTS_Nat.Corresp."

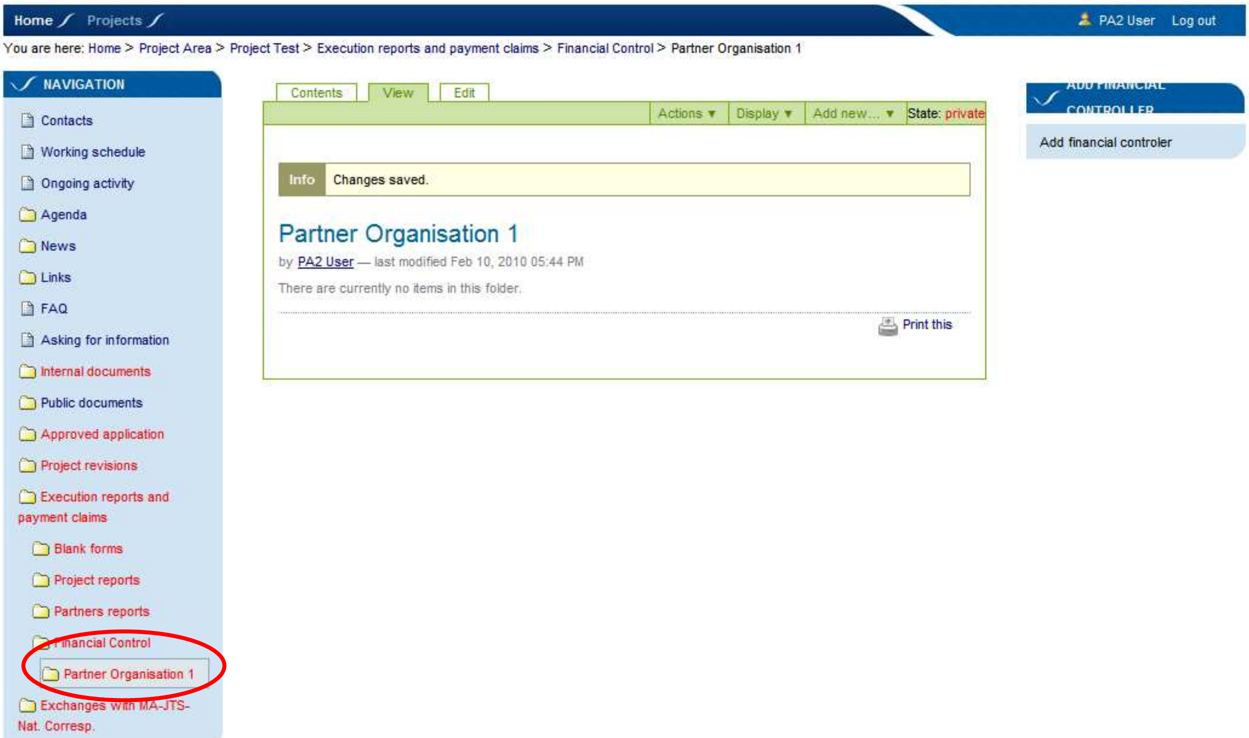
Once this process is done by the Lead Partner, a specific **partner (from Ireland or Northern Ireland)** is in capacity to give access to his **own controller** to the specific file regarding his expenditures.
It is only the Partner that can give this specific access.

1. The **<u>Partner</u>** creates a specific folder **in the Execution reports and payment claims section / Financial Control folder,** through the option "**Add financialreport**" 5

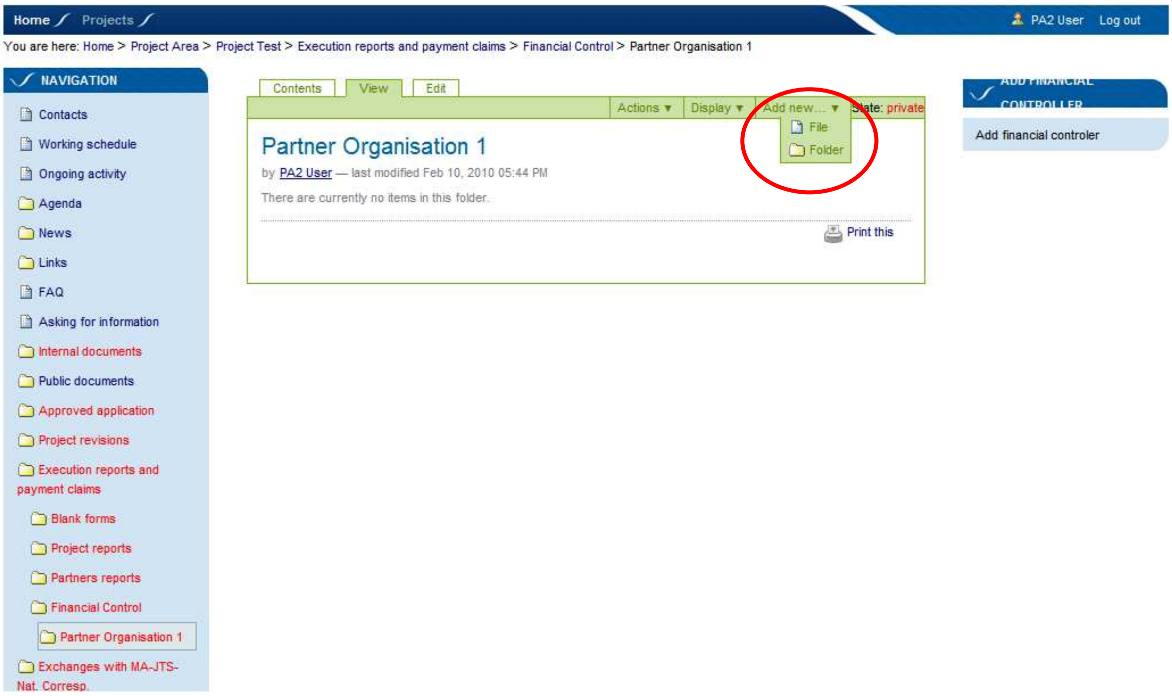


To be as clear as possible, please give to this folder the **name of organisation partner** of the project.

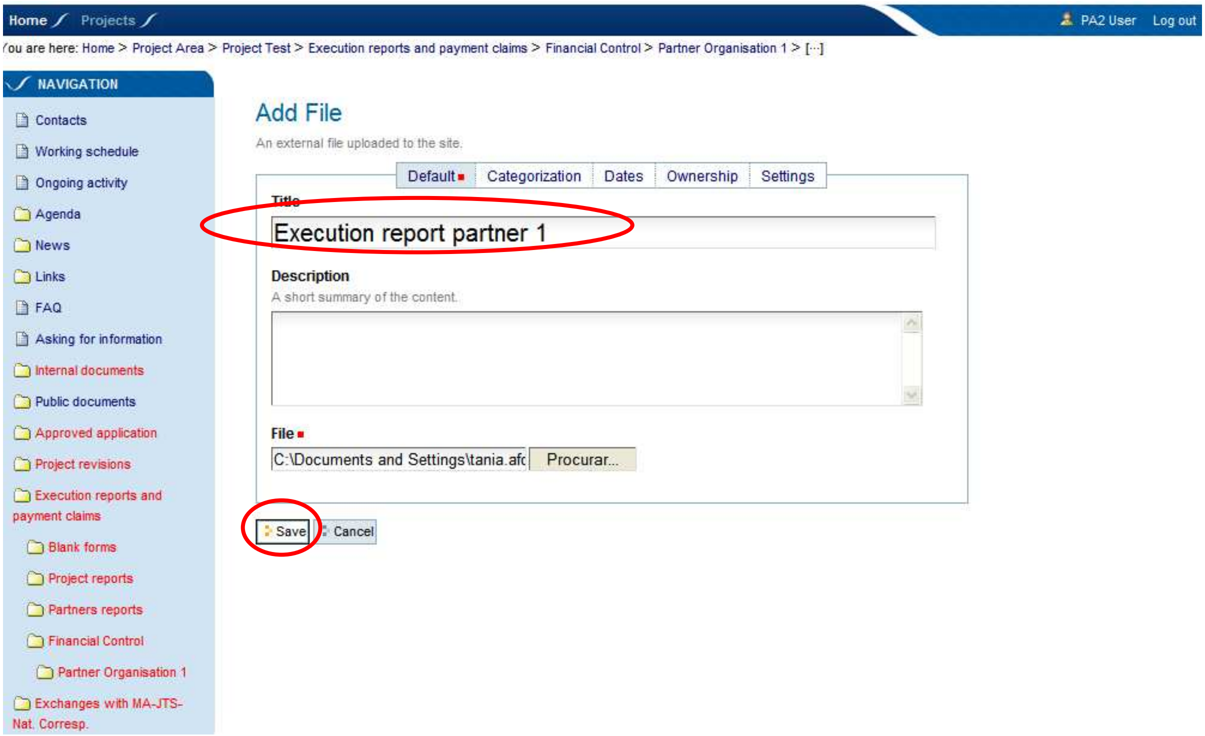


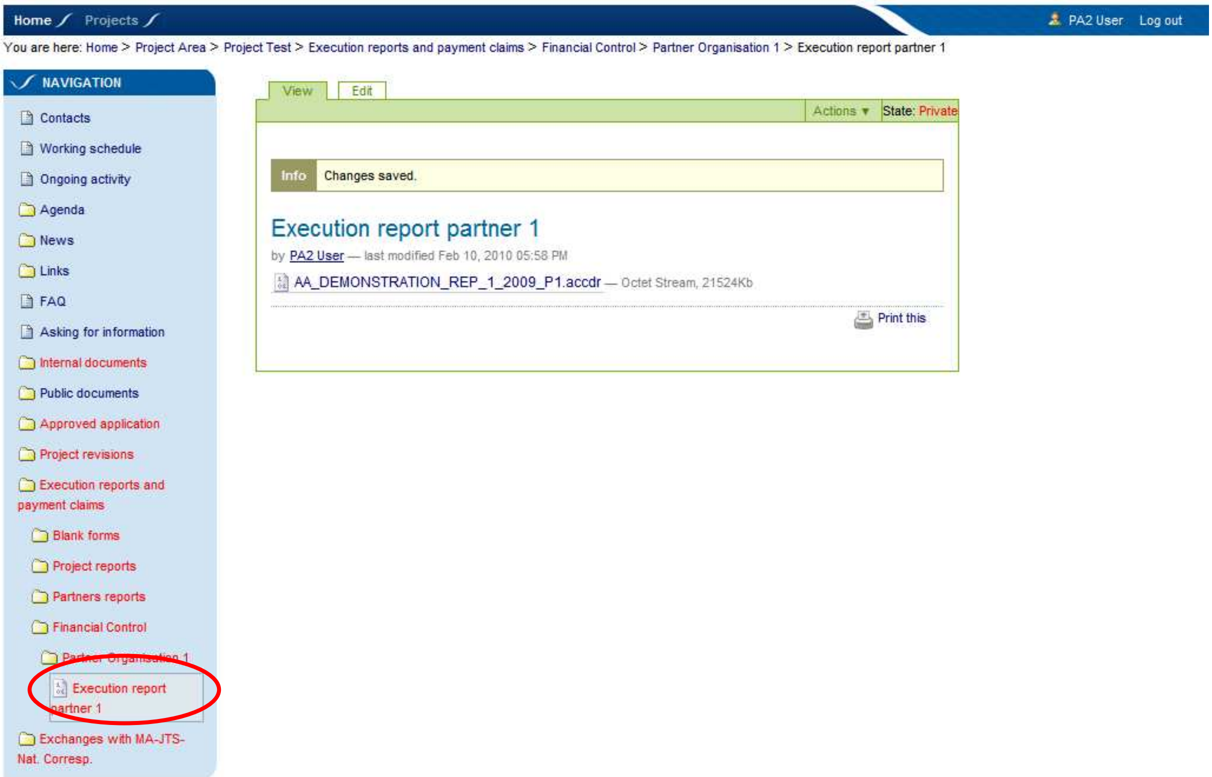


To **upload your Execution report and the Request for reimbursement**, in the folder previously created, the partner must click in "**Add new**" and choose "**File**".

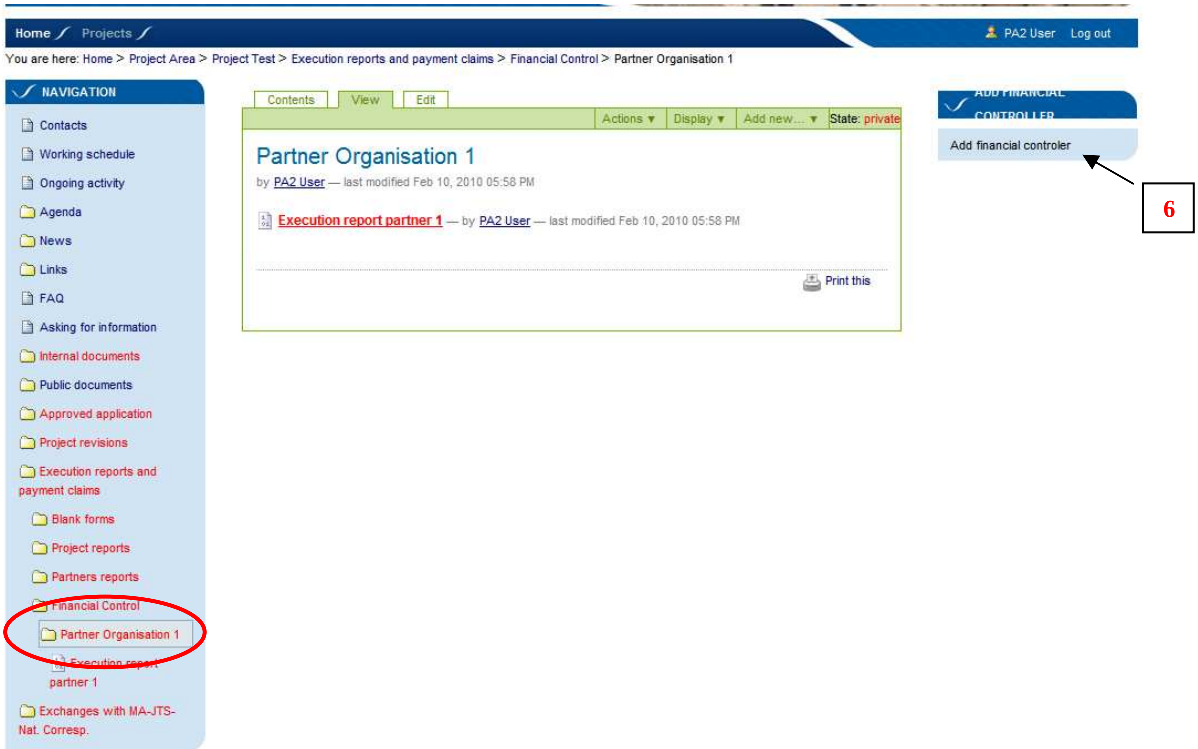


Insert the title and upload the file.





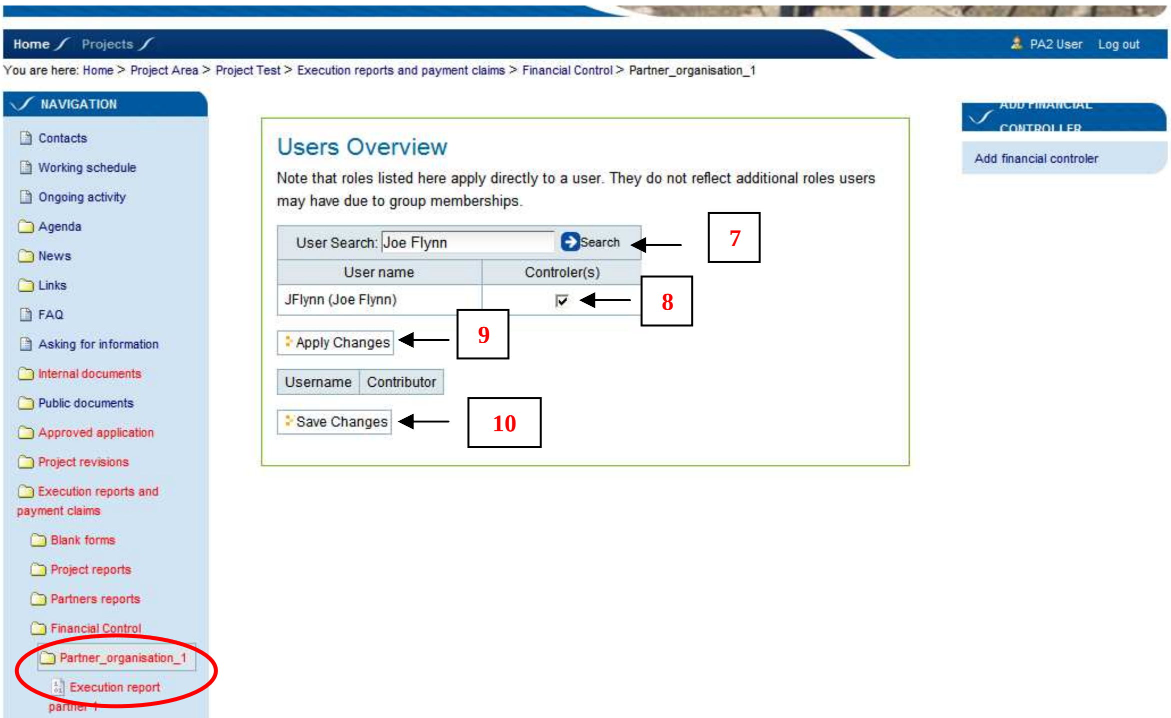
2. In order to give the permission to his **own financial Controller** to access the folder created, the Partner (step 5), must click **within the folder** ("Partner Organisation 1" in this example) and choose in the right menu "**Add financial controller**" 6



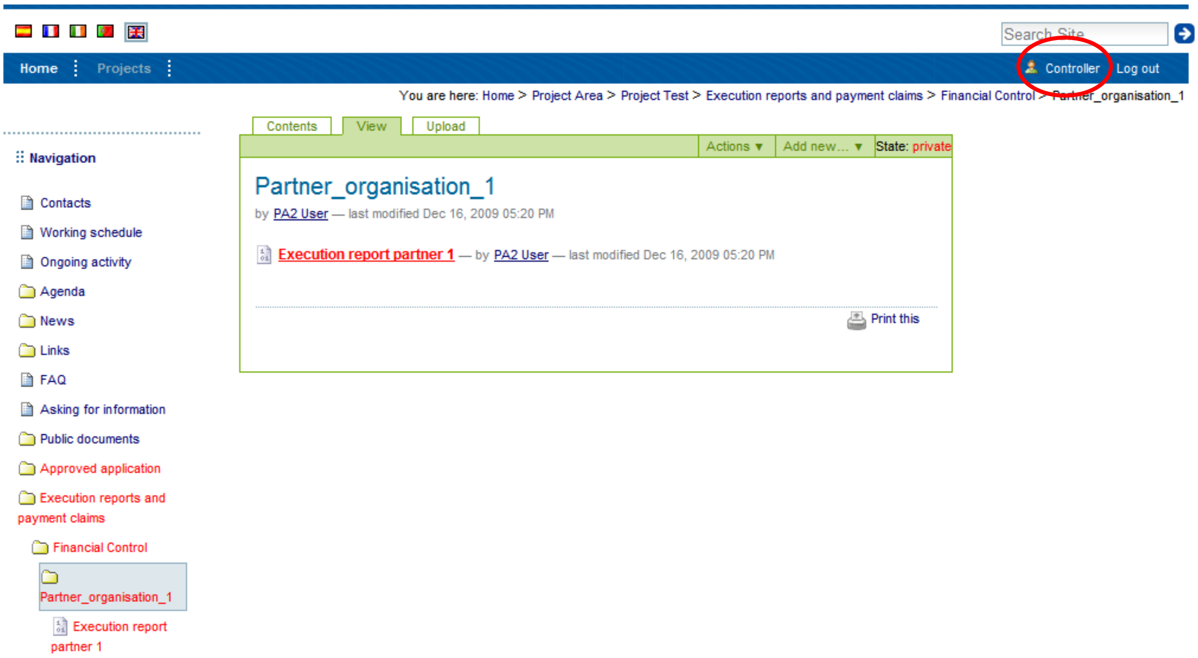
Search **the name of Financial Controller (Joe Flynn or Helen Clark)** 7

Place a tick in the respective user 8

Save the permission assignment by clicking on the "**Apply Changes**" 9 and then "**Save Changes**" 10



Now, when the controller is **logged in the "Project section"**, he/she can view the specific folder and file(s).



Note:

- The financial controllers have permission to view and add files and folders (and eliminate those that were created by them) within the folder that the permission was given.
- Partners only can view the folders that were created by them and can edit and delete folders / files created within the folders.