

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

The screenshot shows the 'Users Overview' page. At the top, there is a navigation bar with 'Home' and 'Projects' links, and a user profile for 'PA1 User' with a 'Log out' button. Below the navigation bar, the breadcrumb trail reads 'You are here: Home > Project Area > Project Test'. On the left, there is a 'NAVIGATION' sidebar with various menu items. The main content area is titled 'Users Overview' and contains a search bar with the text 'User Search: Joe Flynn' and a 'Search' button. A red box with the number '1' is placed over the 'Search' button. Below the search bar is a table with columns for 'Username' and 'Groups'. The table lists three users: 'pa1_user (PA1 User)', 'pa2_user (PA2 User)', and 'Controller1 (Controller)'. The 'Groups' column is divided into three sub-columns: 'PPL_Admin_Project Test', 'PPL_Member_Project Test', and 'PPL_NonMember_Project Test'. The 'Controller1 (Controller)' user has a checked box in the 'PPL_NonMember_Project Test' column. At the bottom of the table is a 'Save Changes' button. On the right side of the page, there is a 'MENU' sidebar with three options: 'Add member', 'Manage Members', and 'Project description'. The 'Manage Members' option is circled in red.

Username	Groups		
	PPL_Admin_Project Test	PPL_Member_Project Test	PPL_NonMember_Project Test
pa1_user (PA1 User)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
pa2_user (PA2 User)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Controller1 (Controller)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Northern Ireland partner

Home / Projects / PA1 User Log out

You are here: Home > Project Area > Project Test

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Users Overview

Note that roles listed here apply directly to a user. They do not reflect additional roles users may have due to group memberships.

User Search: Helen Clarke Search

Enter a username to search for

Username	Groups		
	PPL_Admin_Project Test	PPL_Member_Project Test	PPL_NonMember_Project Test
pa1_user (PA1 User)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
pa2_user (PA2 User)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Controller1 (Controller)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
JFlynn (Joe Flynn)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save Changes

MENU

- Add member
- Manage Members
- Project description

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

Clicks in “Apply changes” **3**

“Save Changes”. **4**

Home / Projects / PA1 User Log out

You are here: Home > Project Area > Project Test

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Users Overview

Note that roles listed here apply directly to a user. They do not reflect additional roles users may have due to group memberships.

User Search: Joe Flynn Search

Enter a username to search for

User name	Groups		
	PPL_Admin_Project Test	PPL_Member_Project Test	PPL_NonMember_Project Test
JFlynn (Joe Flynn)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Apply Changes

Username	Groups		
	PPL_Admin_Project Test	PPL_Member_Project Test	PPL_NonMember_Project Test
pa1_user (PA1 User)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
pa2_user (PA2 User)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Controller1 (Controller)	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Save Changes

MENU

- Add member
- Manage Members
- Project description

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

The screenshot shows the 'Financial Control' folder page. The breadcrumb trail is: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control. The left navigation menu includes 'Execution reports and payment claims' and 'Financial Control', both highlighted with red circles. The main content area shows the 'Add financialreport' button, also highlighted with a red box and the number 5. The page title is 'Financial Control' and it indicates 'There are currently no items in this folder.'

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

The screenshot shows the 'Add financialreport' form. The 'Title' field is filled with 'Partner Organisation 1' and is highlighted with a red circle. The 'Description' field is empty. The 'Save' button is highlighted with a red circle. The breadcrumb trail is: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control > [..].



The screenshot shows a web application interface. At the top, there is a navigation bar with 'Home' and 'Projects' links, and a user profile for 'PA2 User' with a 'Log out' link. Below the navigation bar, a breadcrumb trail reads: 'You are here: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control > Partner Organisation 1'. On the left, a 'NAVIGATION' sidebar lists various categories, with 'Partner Organisation 1' under 'Financial Control' circled in red. The main content area shows a 'Contents' view of the 'Partner Organisation 1' folder, with a message 'Changes saved.' and a 'Print this' button. On the right, there is a button labeled 'ADD FINANCIAL CONTROLLER' and a sub-button 'Add financial controller'.

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”.

This screenshot is similar to the previous one, but the 'Add new...' dropdown menu is open, showing options for 'File' and 'Folder'. The 'File' option is circled in red. The rest of the interface, including the navigation bar, breadcrumb trail, and sidebar, remains the same as in the previous screenshot.



Insert the title and upload the file.

Home / Projects / PA2 User / Log out

You are here: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control > Partner Organisation 1 > [:-]

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 - Project reports
 - Partners reports
 - Financial Control
 - Partner Organisation 1
- Exchanges with MA-JTS-Nat. Corresp.

Add File

An external file uploaded to the site.

Default | Categorization | Dates | Ownership | Settings

Title
Execution report partner 1

Description
A short summary of the content.

File
C:\Documents and Settings\tania.afc\Procurar...

Save | Cancel

Home / Projects / PA2 User / Log out

You are here: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control > Partner Organisation 1 > Execution report partner 1

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 - Partners reports
 - Financial Control
 - Partner Organisation 1
 - Execution report partner 1
- Exchanges with MA-JTS-Nat. Corresp.

View | Edit | Actions | State: Private

Info: Changes saved.

Execution report partner 1

by PA2 User — last modified Feb 10, 2010 05:58 PM

AA_DEMONSTRATION_REP_1_2009_P1.accdr — Octet Stream, 21524Kb

Print this

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

Home / Projects / PA2 User / Log out
You are here: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control > Partner Organisation 1

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Exchanges with MA-JTS-Nat. Corresp.

Partner Organisation 1
by PA2 User — last modified Feb 10, 2010 05:58 PM
Execution report partner 1 — by PA2 User — last modified Feb 10, 2010 05:58 PM
Print this

ADD FINANCIAL CONTROLLER
Add financial controller

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

Home / Projects / PA2 User / Log out
You are here: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control > Partner_organisation_1

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Financial Control
Partner_organisation_1
Execution report partner 1

Users Overview
Note that roles listed here apply directly to a user. They do not reflect additional roles users may have due to group memberships.

User Search: Joe Flynn Search

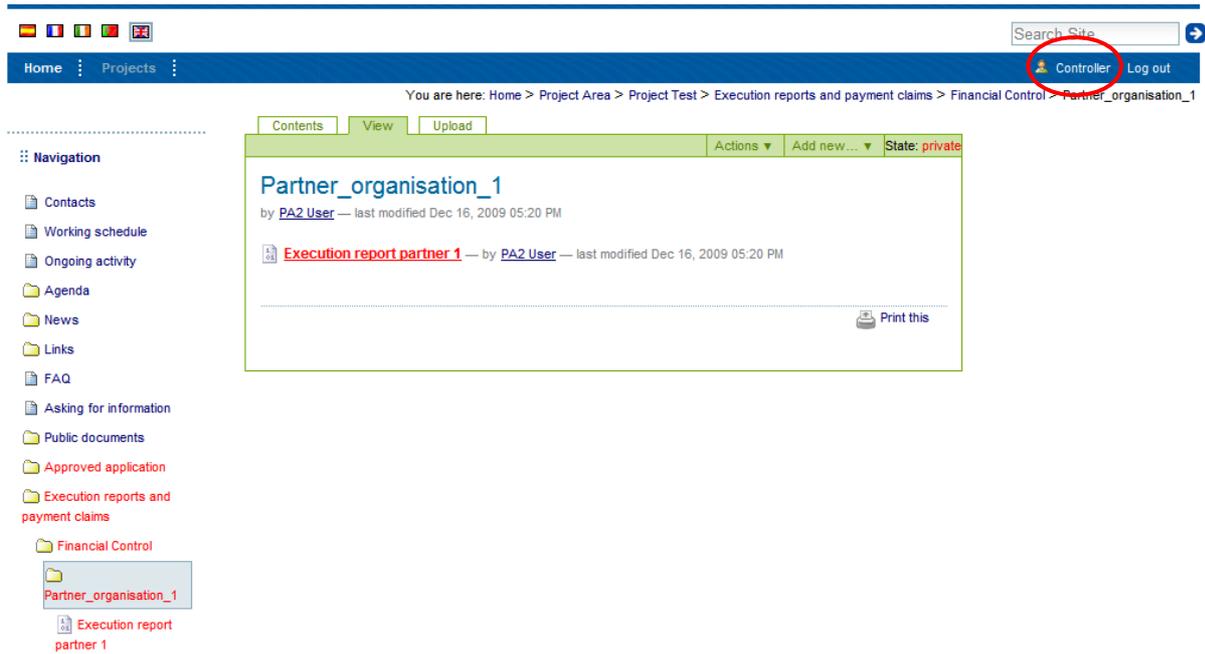
User name	Controller(s)
JFlynn (Joe Flynn)	<input checked="" type="checkbox"/>

Apply Changes

Username Contributor

Save Changes

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



The screenshot displays a web application interface. At the top, there is a navigation bar with 'Home' and 'Projects' menus. A search box is located on the right. Below the navigation bar, a breadcrumb trail reads: 'You are here: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control > Partner_organisation_1'. The main content area shows a folder view for 'Partner_organisation_1', which was created by 'PA2 User' on Dec 16, 2009 at 05:20 PM. Inside this folder, there is a file named 'Execution report partner 1', also created by 'PA2 User' on the same date and time. A 'Print this' button is visible at the bottom right of the folder view. On the left side, there is a 'Navigation' menu with various options, including 'Partner_organisation_1' which is highlighted.

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.