



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

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 (external first level controller or "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 **Lead Partner** must **register the financial controller of each partner** choosing "Add member". This step gives the controller access to the "Projects" section of the website (**only Lead partners project could give this access**).

The screenshot shows the Atlantic Area website interface. At the top, there are language selection icons (Spain, France, Ireland, Portugal) and a search bar. Below that is a navigation bar with 'Home' and 'Projects' menus, and a user profile for 'PA1 User' with a 'Log out' link. The main content area displays the 'Project Test' page, which is under construction. The page title is 'Project Test' by 'JTS', last modified on Nov 12, 2009. The text on the page states: 'The page is under construction, the Lead Partner will provide soon a brief description of the project'. Below this, there are links for 'Project Details', 'Print this', and 'Notify Users'. On the right side, there is a 'MENU' section with three items: 'Add member' (circled in red), 'Manage Members', and 'Project description'. On the left side, there is a 'Navigation' menu with various categories like 'Contacts', 'Working schedule', 'Ongoing activity', 'Agenda', 'News', 'Links', 'FAQ', 'Asking for information', 'Internal documents', 'Public documents', 'Approved application', 'Project revisions', 'Execution reports and payment claims', and 'Exchanges with MA-JTS-Nat. Corresp.'

The Lead Partner must fill in the **registration form** with the name, user name and e-mail address of the financial controller. The financial controller will receive an e-mail with a link to choose a password. Note that the controller needs to know his/her username, ask him/her to choose one before the registration or tell him/her the username you chose.

Personal Details

Full Name
 Enter full name, eg. John Smith.

User Name ■
 Enter a user name, usually something like 'jsmith'. No spaces or special characters. Usernames and passwords are case sensitive, make sure the caps lock key is not enabled. This is the name used to log in.

E-mail ■
 Enter an email address. This is necessary in case the password is lost. We respect your privacy, and will not give the address away to any third parties or expose it anywhere.

A URL will be generated and e-mailed to you; follow the link to reach a page where you can change your password and complete the registration process.

Once the controller has been **registered**, 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.

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: **1**

No matches

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"/>

MENU

- Add member
- Manage Members**
- Project description

Secondly, the Lead Partner adds it to the group “PPL_NonMembers_ <Project>”,

Clicks in “Apply changes” 3

“Save Changes”. 4

The screenshot shows the 'Users Overview' page. At the top, there is a search bar with 'controller' entered. Below it is a table with columns for 'User name' and 'Groups'. The 'Groups' column has three sub-columns: 'PPL_Admin_Project Test', 'PPL_Member_Project Test', and 'PPL_NonMember_Project Test'. The row for 'Controller1 (Controller)' shows checkboxes for each group, with the 'PPL_NonMember_Project Test' checkbox checked. A red circle highlights this checkbox, and an arrow points from a box with the number '2' to it. Below the table, there is an 'Apply Changes' button with an arrow pointing to a box with the number '3'. Below that is a 'Save Changes' button with an arrow pointing to a box with the number '4'. On the right side, there is a 'MENU' section with links for 'Add member', 'Manage Members', and 'Project description'.

After the step 4 , the Controller 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** 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.**



2. 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 web application interface. At the top, there are language selection icons and a search bar. Below that is a navigation bar with 'Home' and 'Projects'. The main content area shows the breadcrumb path: 'You are here: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control'. The 'Financial Control' folder is displayed, with a 'Contents' tab selected. The folder name 'Financial Control' is highlighted with a red box and the number '5'. The 'Add financialreport' button is also highlighted with a red box and the number '5'. The navigation menu on the left has 'Execution reports and payment claims' and 'Financial Control' highlighted with red circles.

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 circled in red. The 'Description' field is empty. The 'Save' button is also circled in red. The navigation menu on the left has 'Execution reports and payment claims' and 'Financial Control' highlighted with red circles.



Search Site

Home Projects PA2 User Log out

You are here: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control > Partner_organisation_1

Contents View Edit Upload Actions Display Add new... State: private

Info Changes saved.

Partner_organisation_1

by PA2 User — last modified Dec 15, 2009 08:14 PM

There are currently no items in this folder.

Print this

Navigation

- Contacts
- Working schedule
- Ongoing activity
- Agenda
- News
- Links
- FAQ
- Asking for information
- Internal documents
- Public documents
- Approved application
- Project revisions
- Execution reports and payment claims
- Blank forms
- Project reports
- Partners reports
- Financial Control
- Partner_organisation_1**
- Exchanges with MA-JTS-Nat. Corresp.

Add financial controller

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”.

Search Site

Home Projects PA2 User Log out

You are here: Home > Project Area > Project Test > Execution reports and payment claims > Financial Control > Partner_organisation_1

Contents View Edit Upload Actions Display Add new... State: private

Partner_organisation_1

by PA2 User — last modified Dec 15, 2009 08:14 PM

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Add financial controller

Add financial controller



Insert the title and upload the file.

The screenshot shows the 'Add File' interface. At the top, there are tabs for 'Default', 'Categorization', 'Dates', 'Ownership', and 'Settings'. The 'Title' field contains 'Execution report partner 1'. Below it is a 'Description' field with a placeholder text 'A short summary of the content...'. The 'File' field shows the path 'C:\Documents and Settings\tania.afc' and a file named 'Procurar...'. At the bottom of the form, there are 'Save' and 'Cancel' buttons. On the left side, there is a navigation menu with various categories, and 'Execution reports and payment claims' is highlighted.

The screenshot shows the details page for the file 'Execution report partner 1'. At the top, there are 'View' and 'Edit' buttons. Below that, there is an 'Info' box with the text 'Changes saved.'. The main content area displays the title 'Execution report partner 1' by 'PA2 User' — last modified Dec 16, 2009 05:20 PM. Below the title, there is a link to the file 'Atlantic Area Execution Report And Payment Claim Form 2009V1.accdr' — Octet Stream, 23132Kb. A 'Print this' button is also visible. On the left side, there is a navigation menu, and 'Execution report partner 1' is circled in red.



3. 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

The screenshot shows a web application interface with a navigation menu on the left and a main content area. The navigation menu includes a red circle around the folder 'Partner_organisation_1'. The main content area shows the folder 'Partner_organisation_1' with a sub-item 'Execution report partner 1'. On the right-hand side, there is a menu with the option 'Add financial controller' highlighted by a red box and an arrow pointing to it. A red box with the number '6' is also present next to the arrow.



Search the name of **Financial Controller** 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.