CBC 2014-2020
SOUTH-EAST FINLAND - RUSSIA

PROMAS

Programme Management System

Technical user manual for applicants

Published by the Managing Authority
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Funded by the European Union, the Russian Federation and the Republic of Finland.

CONTENT

1. Introduction

PROMAS (Programme Management System), is a tailored web based application software published at https://www.promascbc.fi. It is developed for planning and submitting applications, payment requests, change requests and project reports. The majority of requests for additional information are also processed by using the system. The Managing Authority and its Branch Office use the system to perform checks and evaluation on applications and to monitor funded projects. Other stakeholders, like the members of the committees, experts and auditors use the system for quality assessments, as a source of information for selecting funded projects and for the verifications of the programme and project implementation.

Key principles for using the PROMAS

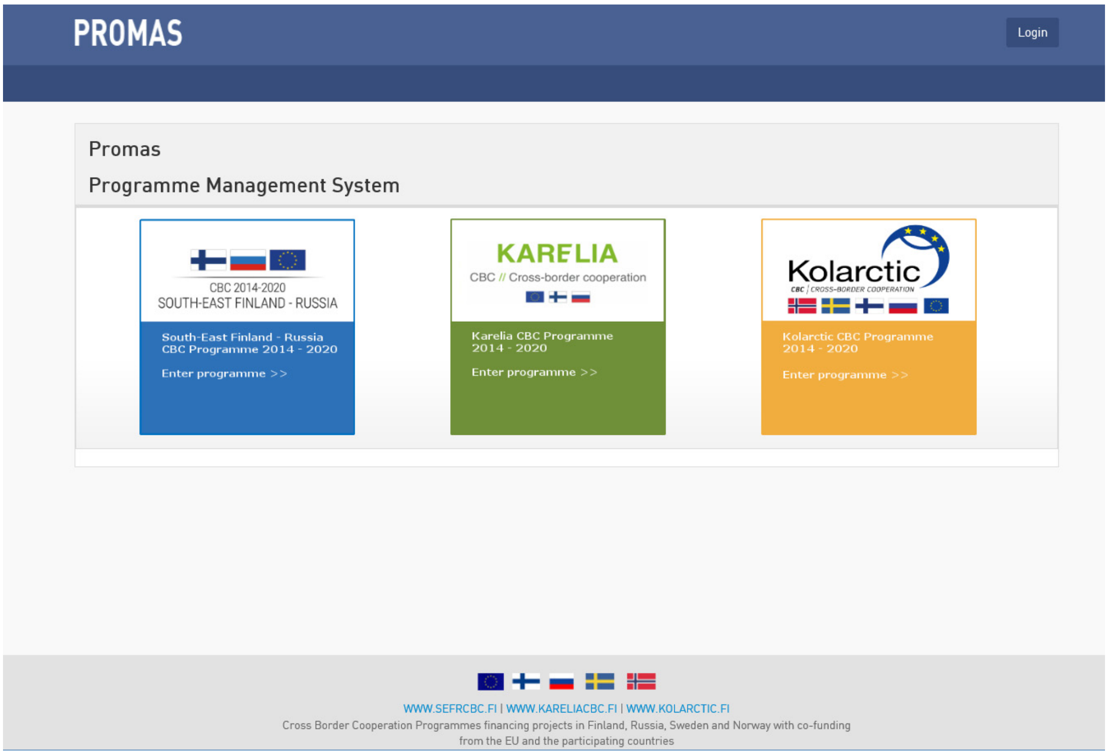
- Registration to the system as a user for the South-East Finland – Russia CBC Programme is possible from 30 January 2017 onwards until the MA announces the closure of the Programme's application period.
- Registration is done by providing an email address that is used for submitting automatically generated username (KS + four digits) and initial password.
- Username is application-specific and, in case the proposal is awarded a grant, the username shall apply as the project's PROMAS id.
- The lead partner is responsible for the content of the information presented in the application.
- The lead partner can create and manage partner rights by maintaining read or read/write rights.
- All the forms in the system may be filled in during several sessions.
- All information must be filled in in English (the name of the lead partner is also required in the original language of the organisation).
- In order to meet the administrative and eligible check criteria, all questions must be answered and the requested information must be completed.
- Pay attention to the Annexes section, where all mandatory annexes must be downloaded before the submission of the application.

First level support

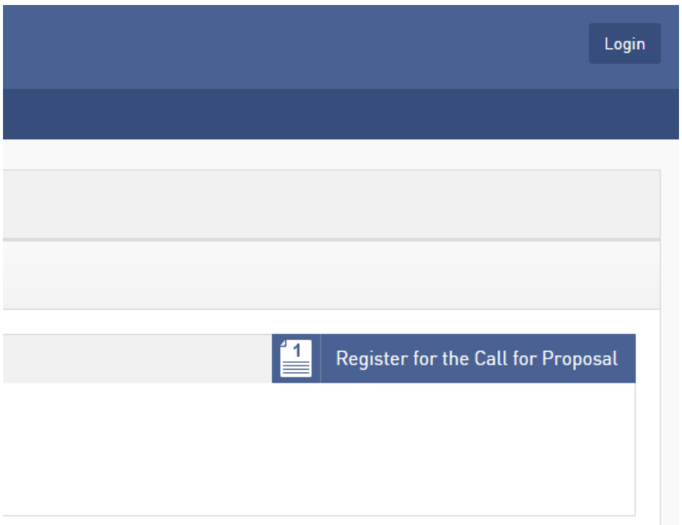
First level user-support for all target groups is Managing Authority according to contacts via **official@sefrcbc.fi or by telephone +358 40 667 3958** / IT & Project Analyst during the office hours. MA's administrator user shall analyse all contacts and solve the problems as first level solutions, or forward issues for more technical troubleshooting to the system provider.

2. Registration

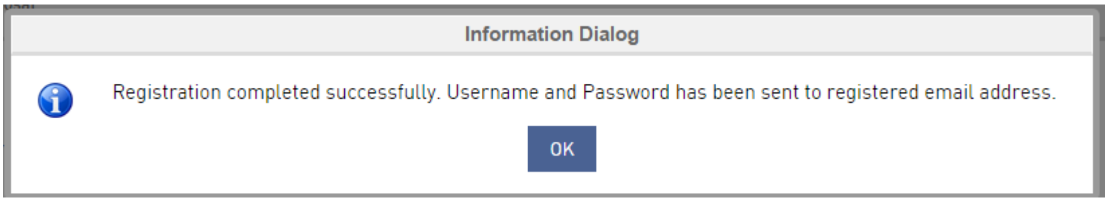
To registrate for the PROMAS system and to apply for funding go to website at https://www.promascbc.fi and select the CBC 2014-2020 South-East Finland - Russia Programme by clicking **Enter programme** on the main menu.



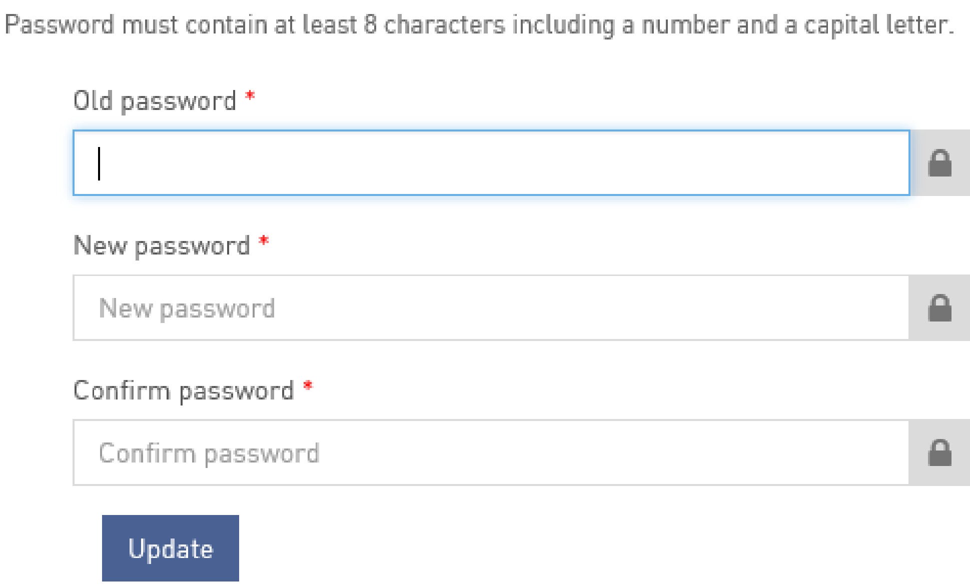
Select available call by clicking **Register for the Call for Proposals**.



Request user name and initial password by providing email address and select **Register**. After successful request following information is shown:



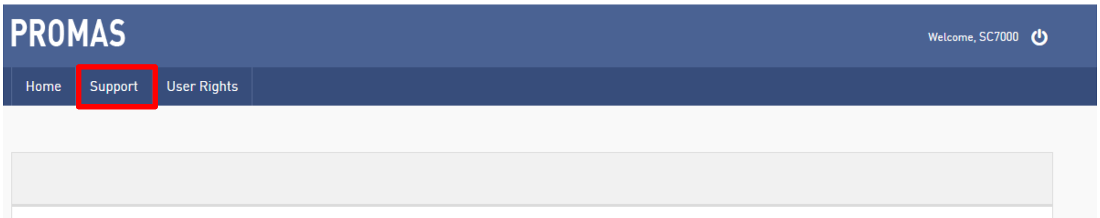
The PROMAS will automaticly generate call for proposal-specific user name and initial password, that are send from noreply@testlab.fi to the given email address. Login to the PROMAS with credentials in the email by clicking **Click here to Login** –link. Type the username and password and select **Login**. A new window to change intitial password opens.



Type the old password and give the new password. Please note that the password must contain **at least 8 characters including a number and capital letter**. The new password cannot be the same as old one. Finish the change of the password by selecting **Update**.

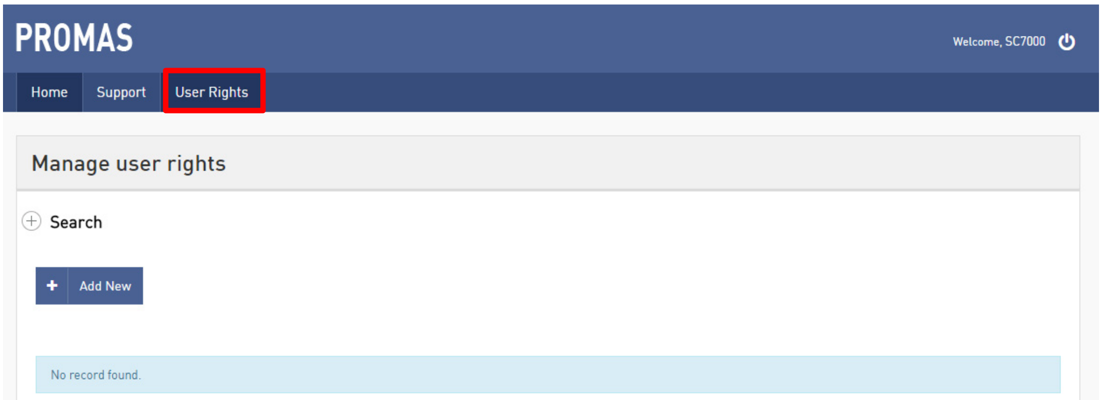
3. Support

When entering to the application homepage, main navigation bar is visible. By selecting **Support**, following information will be available with the direct links to Programmes' websites: *Programme-specific instructions for using PROMAS as well as guidelines for Calls for Proposals and Programme Manuals are available at the Programmes' websites.*



4. User rights

To create and manage user rights select **User rights** in the main navigation bar.

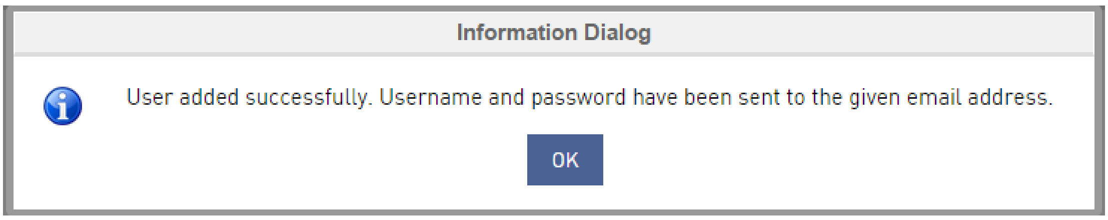


The lead applicant can create and manage partner rights by giving following information:

- Name of the partner
- Email of the partner

  Access rights:
  - Read: partner has only reading rights
  - Write and read: partner has the same access rights as the lead partner

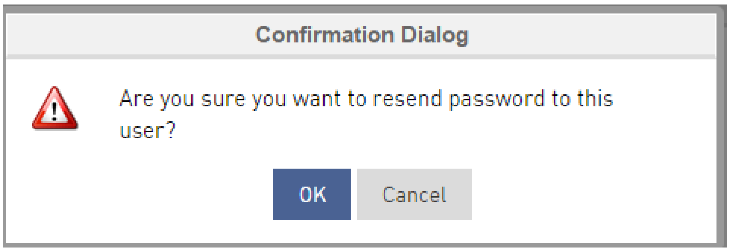
After successful creation following information is shown:



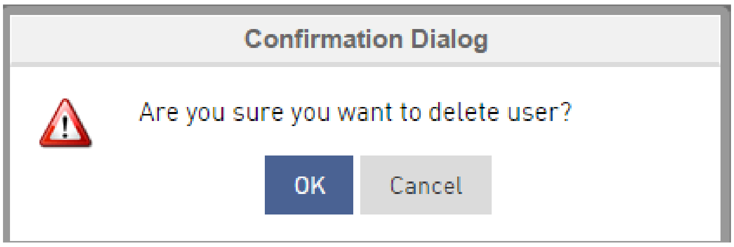
Following information and functionalities are available in the manage user rights page:

- Add New partner
- Delete selected users
- Name of the partner
- Username
- Email

Resend password: in case partner forgets the password, lead partner applicant can resend the password via this functionality. System will ask to confirm the resending. New password must be given when resent has been done.

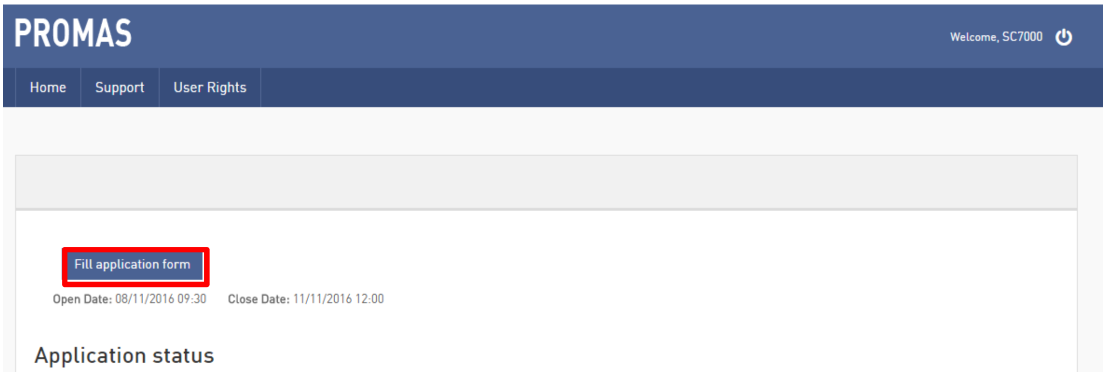


- Edit partner name or access rights (write & read or read)
- Delete partner. System will ask to confirm user deletion.



5. Fill in an application

Select **Fill application form** at the main page.



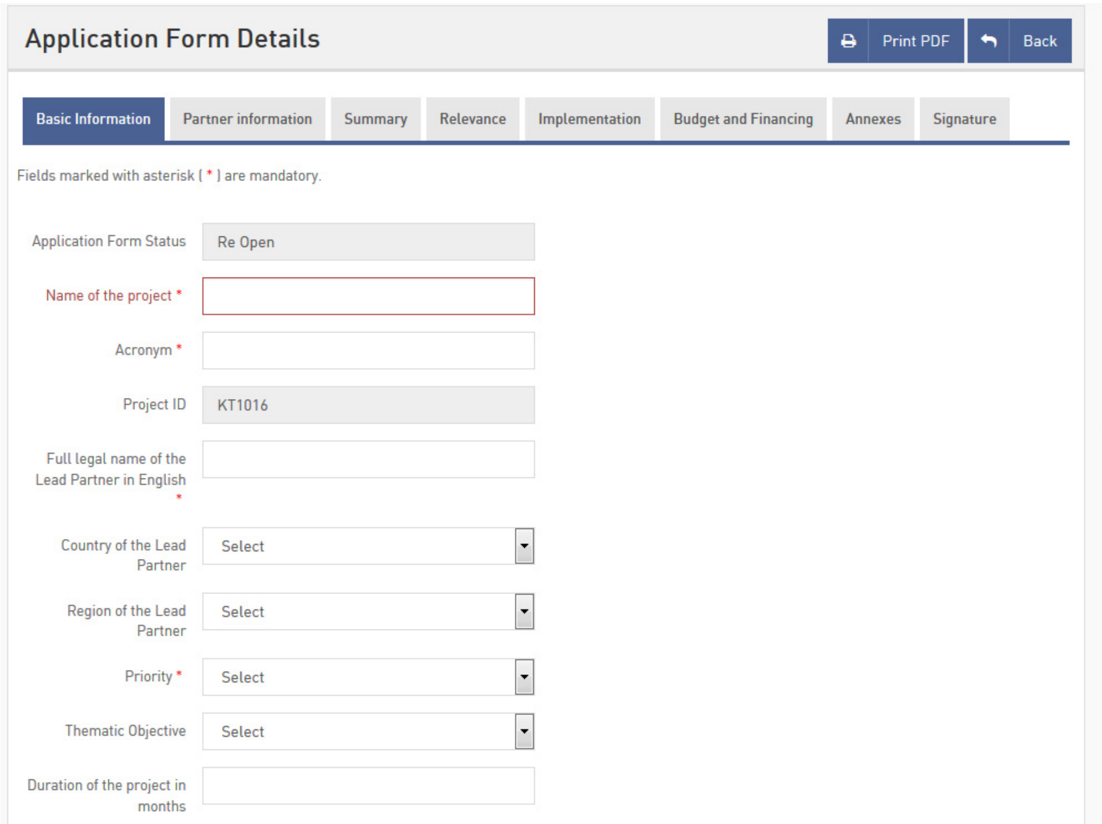
5.1 Basic information

Section Basic information request following information:

- Name of the project (Mandatory)
- Acronym (Mandatory)
- Full legal name of the Lead Partner in English (Mandatory)
- Country of the Lead Partner (Select the country)
- Region one the Lead Partner (Select the region)
- Priority (Mandatory selection)
- Thematic Objective (Select from the list)
- Duration of the project in months

When adding a partner, provide Partner details and select **Add**.

NOTE: Requested financing –table is automatically filled in when providing information to the Budget and Financing page.



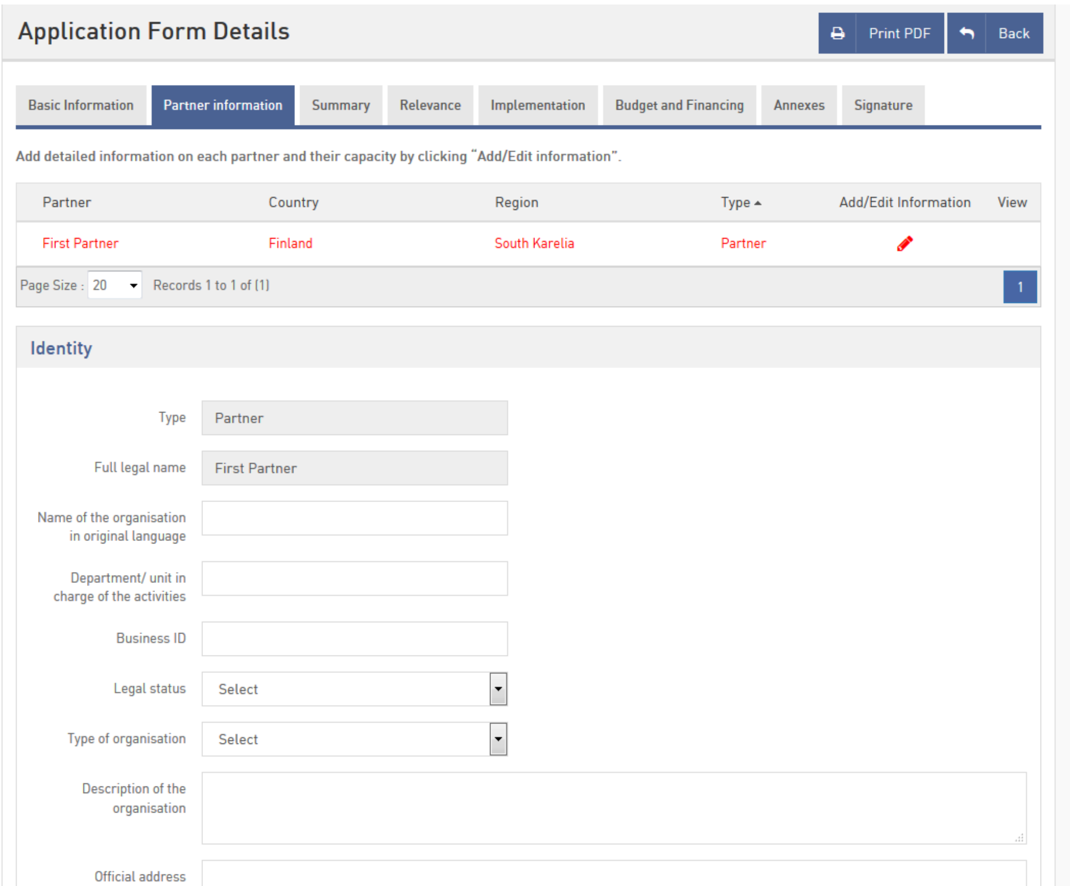
Press **Save & Next** to move next part (tab) of the application or **Save & Stay** to continue on the same page. To go back, select **Previous**.

5.2 Partner information

Section Partner information request following information of the lead partner and partner:

- Name of the organization in original language
- Department/unit in charge of the activities
- Business ID
- Legal status (Selection; Public or Private)
- Type of the organisation (Selection from the list)
- Description of the organisation
- Official address
- Postal address
- Telephone number
- Email of the organisation
- Website of the organisation

Add information of the contact person and fill in the Motivation and Capacity sections. When providing information to the Financial Capacity –table note that the question of sufficient financial resources to implement project taking into account both own contribution and final payment applies only to the lead partner.



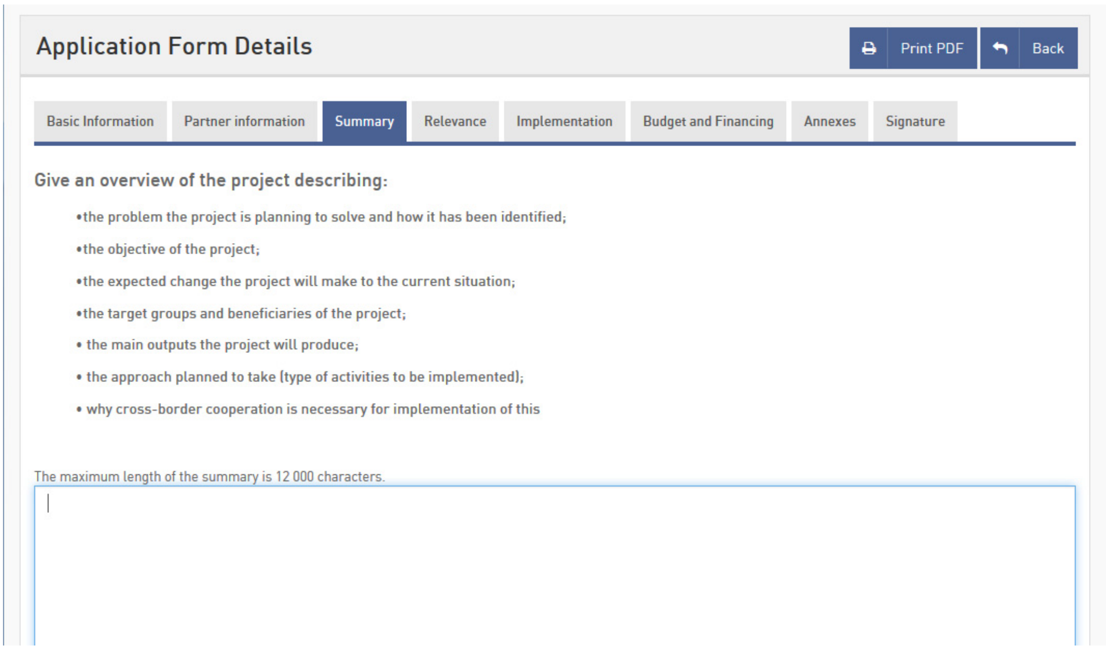
Press **Save & Next** to move next part (tab) of the application or **Save & Stay** to continue on the same page. To go back, select **Previous**.

5.3 Summary

Provide the description of the following information:

- What is the problem that the project is planning to solve and how it has been identified?
- What are the objectives of the project?
- What is the expected change that the project will contribute for the current situation?
- Which are the target groups and beneficiaries?
- Which are the main outputs of the project?
- What is the planned approach and what kind of activities are used?
- Why cross-border cooperation is needed for this problem?

The maximum length of the summary is 12000 characters.



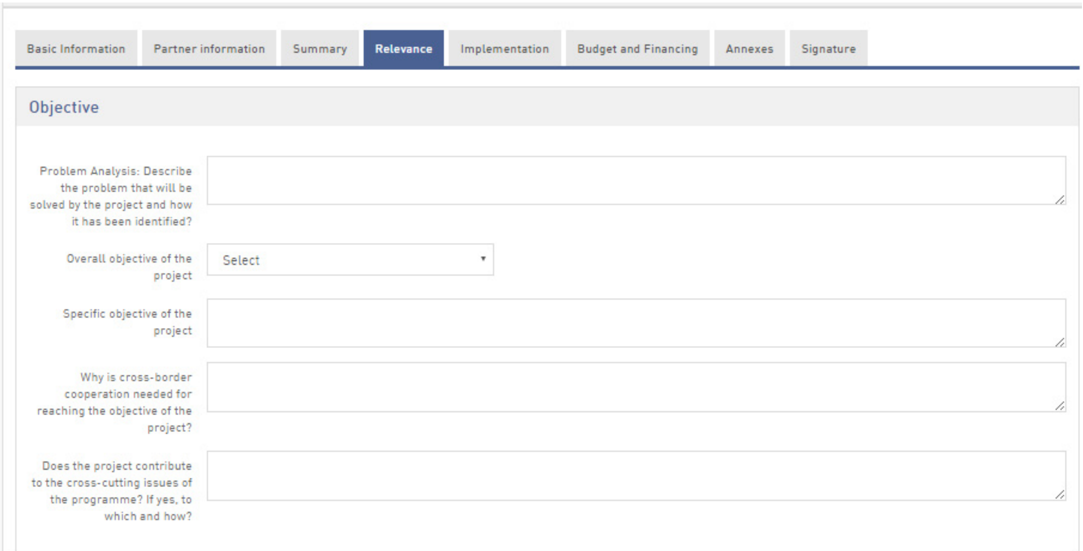
Press **Save & Next** to move next part (tab) of the application or **Save & Stay** to continue on the same page. To go back, select **Previous**.

5.4 Relevance

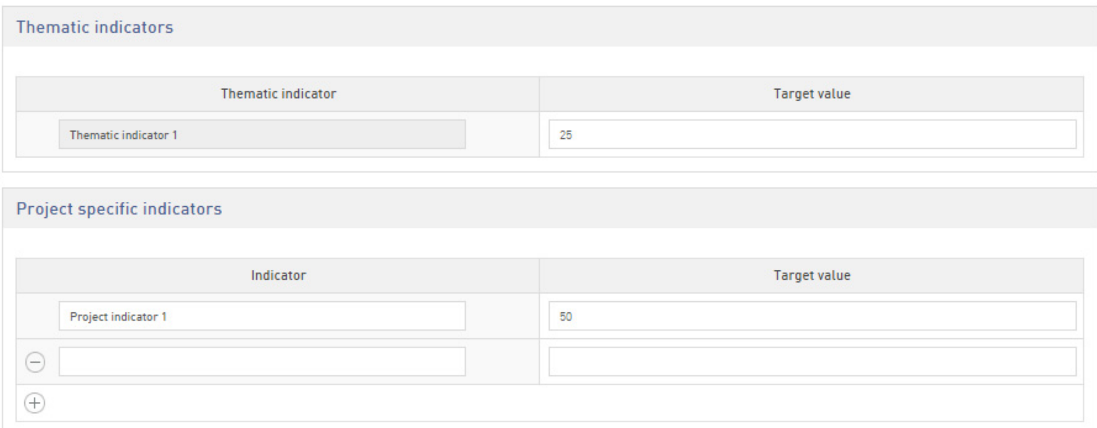
Relevance part of the application requires following information:

- Objective
- Thematic indicators & Project specific indicators
- Work plan & Activity planner
- Sustainability

Provide the Objective details to the application. Select Overall objective of the project from the selection box.



Provide target value to the Thematic indicators and name and set target values to Project specific indicators. NOTE: Thematic Indicators are set by the Programme.



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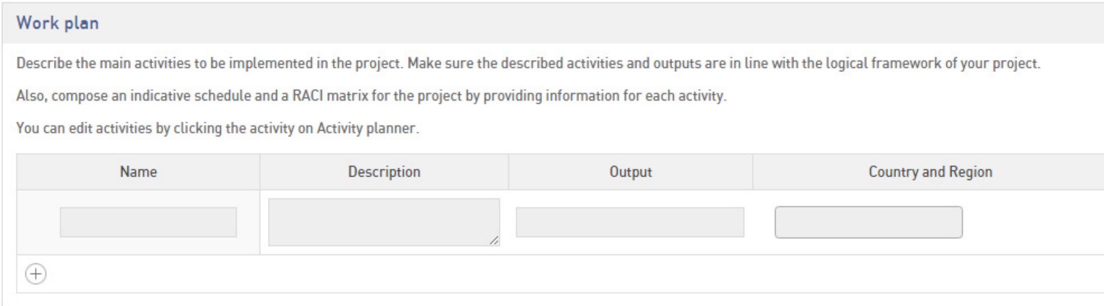
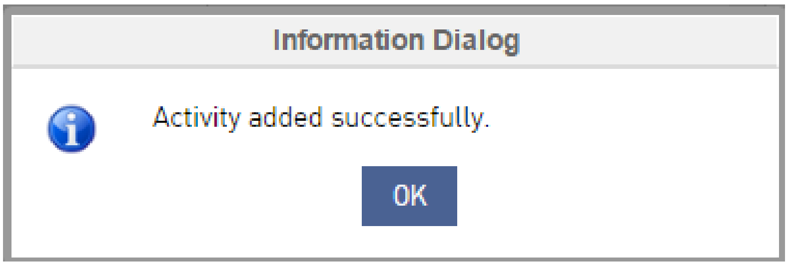
Create a work plan for the project.



Click "+" sign to add activity and the **Add activity pop up window** opens. Give the following information to the activity:

- Name of the activity (Mandatory)
- Description (Mandatory)
- Status of the activity (selection: To Do; In Progress; Completed)
- Estimated start date (Mandatory)
- Estimated end date (Mandatory)
- Activity order (Mandatory)
- Responsible partner ((selection based on the earlier provided partner information)
- Accountable partner (selection based on the earlier provided partner information)
- Consulted partner (selection based on the earlier provided partner information)
- Informed partner (selection based on the earlier provided partner information)
- Location (selection based on the call for proposal data)
- Output (output/result of the activity)

Select **Save** button to save the activity. System confirms the addition.



Once the activities are created, they are visible in the work plan and in the activity planner view. In the Activity Planner, lead applicant can view activities on daily, weekly, monthly or yearly level. Applicant can **Edit/Update/Delete** the activity by clicking the specific activity in the Activity Planner. Activity can be also deleted by clicking "–" sign on the work plan.

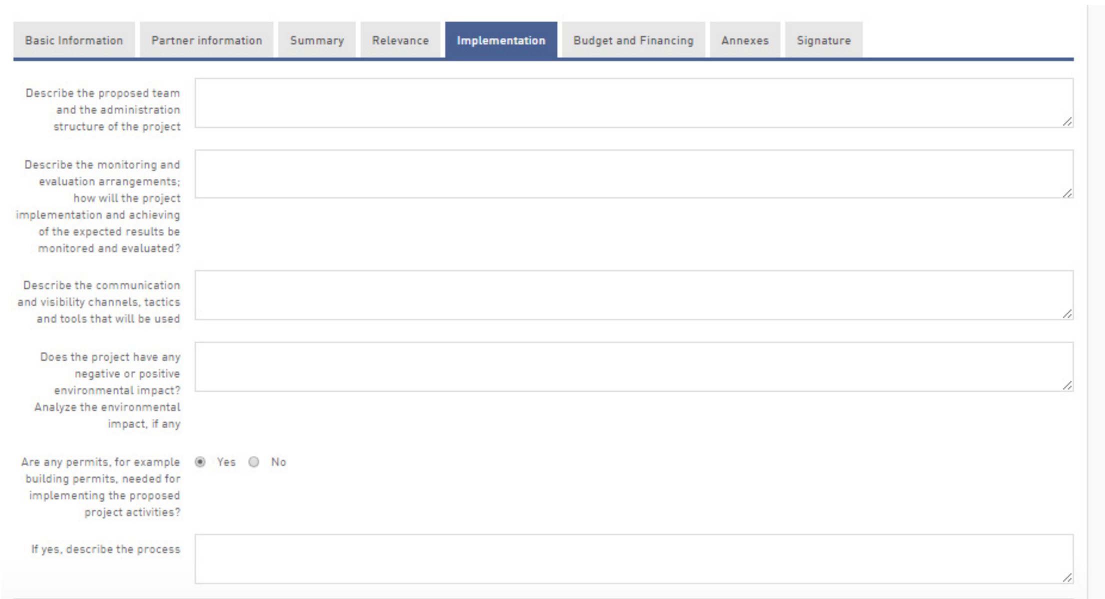
Activity planner is also updating RACI –table to the application, which shows on the activity level and the role of the partners.

Sustainability of the proposed project activities is presented in this section.

Press **Save & Next** to move next part (tab) of the application or **Save & Stay** to continue on the same page. To go back, select **Previous**.

5.5 Implementation

Implementation of the proposed project activities is described in this section by answering to the questions.



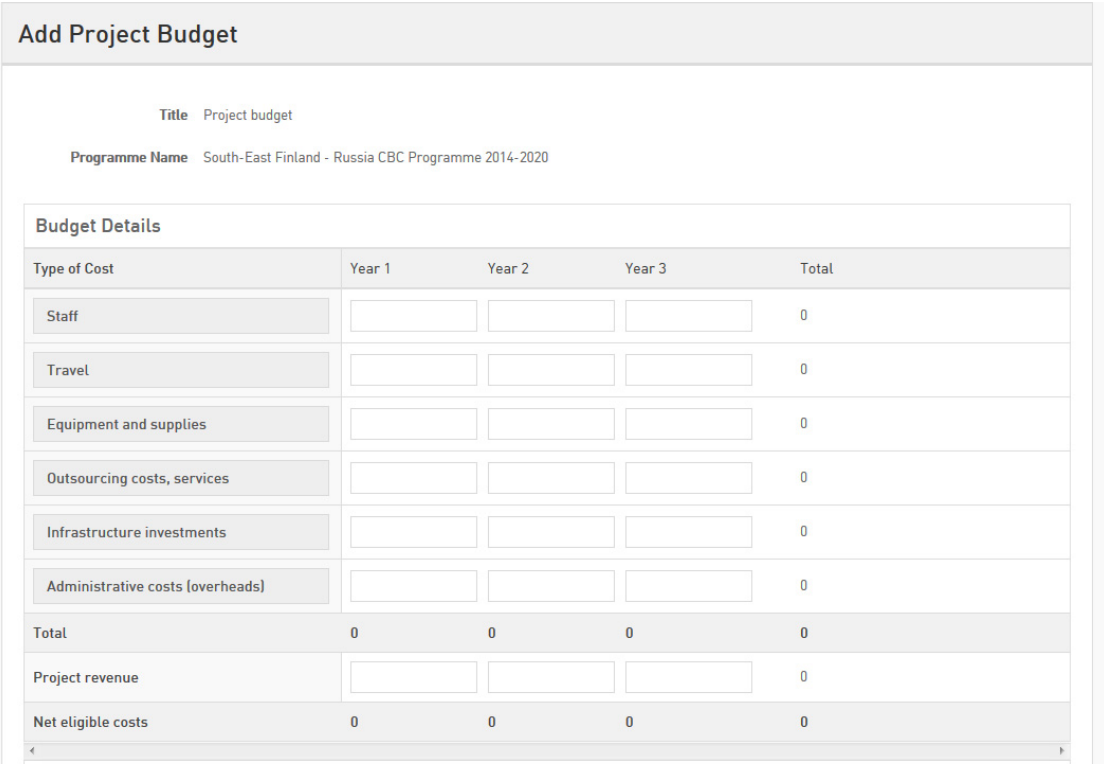
Press **Save & Next** to move next part (tab) of the application or **Save & Stay** to continue on the same page. To go back, select **Previous**.

5.6 Budget and Financing

The lead applicant must also fill in the project budget. Click **Add/Edit** sign in the view. New window for Project Budget opens. Budget is provided to the PROMAS per main budget heading. Detailed budgets of each partner and consolidated project budget shall be attached to the application as an excel-file.

Fill in following information to the Budget Details:

- Costs per main heading per year
- Project Revenue (if any)



Add Project Budget

Title Project budget

Programme Name South-East Finland - Russia CBC Programme 2014-2020

Budget Details

Type of Cost	Year 1	Year 2	Year 3	Total
Staff				0
Travel				0
Equipment and supplies				0
Outsourcing costs, services				0
Infrastructure investments				0
Administrative costs (overheads)				0
Total	0	0	0	0
Project revenue				0
Net eligible costs	0	0	0	0

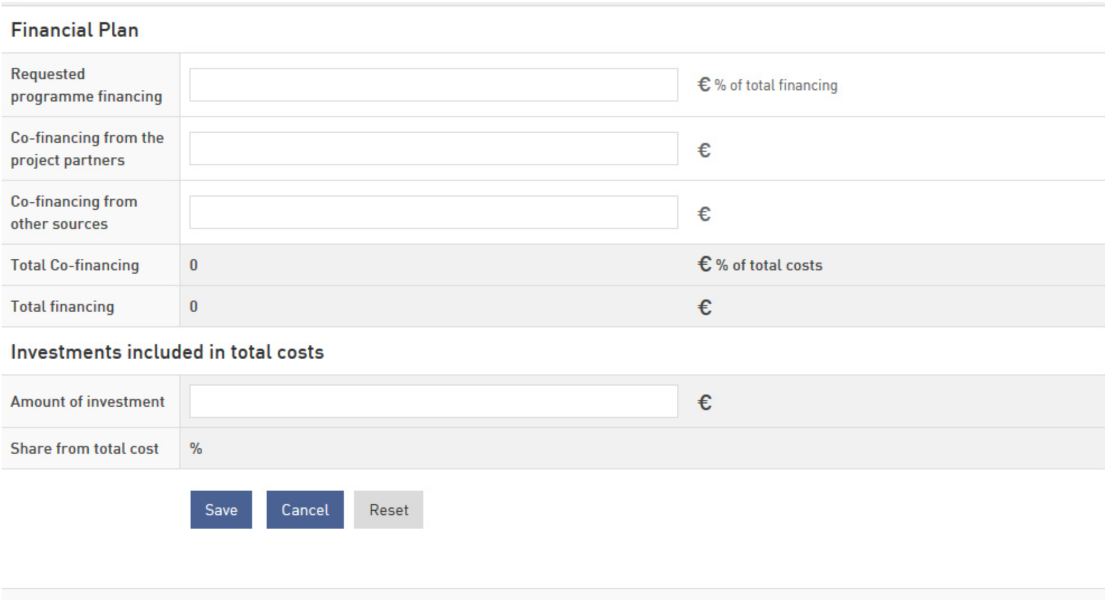
To the Financial Plan, applicant must provide following information:

- Requested programme financing
- Co-financing from the project partners
- Co-financing from the other sources

Total Co-financing and Total financing are calculated automaticly.

- Amount of Investment

% -share from total costs is calculated automaticly.



Press **Save** to move next part (tab) of the application or **Reset** to clear the information. To go back, select **Cancel**.

NOTE: The Net eligible costs in the project budget and the total financing must comply with each other. In case of mismatch, the system gives Information Dialog of the error.

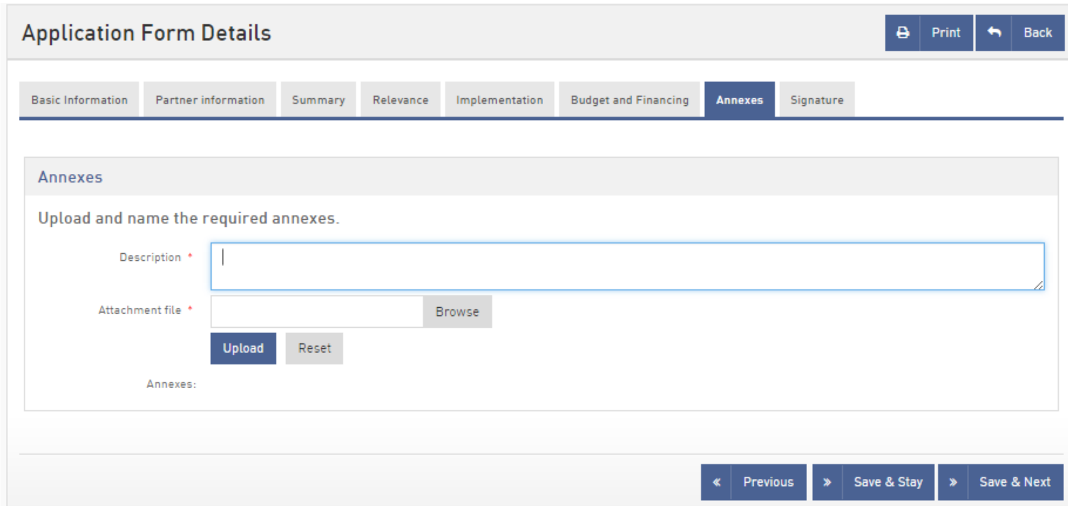
NOTE: When the project budget and financial plan are correctly saved, the system confirms succesful saving.

5.7 Annexes

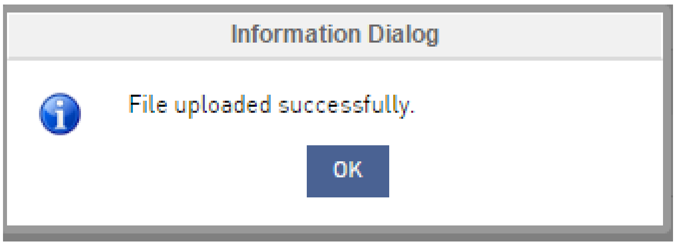
Required annexes are listed in the Programme Manual. They must be downloaded and stored to the PROMAS before entering to the Signature page.

- Maximum size of the individual file is 15 Mb
- Acceptable forms are .pdf, .jpeg, .png, .doc, .docx, .xls and .xlsx

Describe the content of the file and name it clearly.



To attach required documentation to the application select **Browse** push button. A new window opens for file selection for the downloading. Select the file and press **Open**. The systems confirms successful downloading.



Downloaded files are visible in the Annexes section.

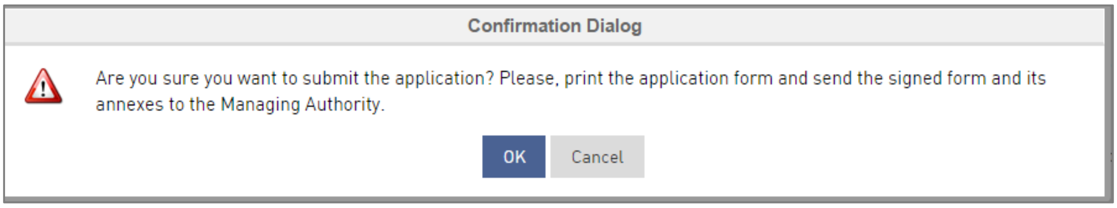
Press **Save & Next** to move next part (tab) of the application or **Save & Stay** to continue on the same page. To go back, select **Previous**.

5.8 Signature

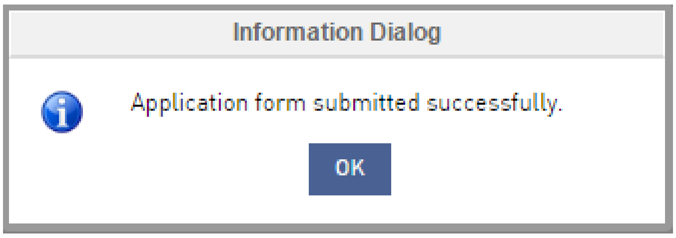
The lead applicant delivers completed application and its annexes as an electronic submission to PROMAS and the whole document package in one signed paper copy to the Managing Authority by the announced deadline of a call they decide to apply. The application must be signed to the Signature sheet. Before the electronic submission following information must be provided:

- Name (authorised person to sign)
- Position (authorised person to sign)
- Date

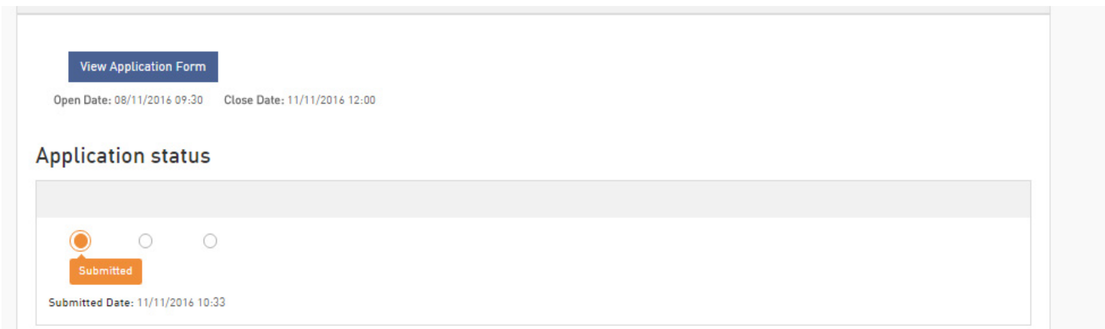
Select **Submit** to submit the application. The system asks confirmation for the submission.



The system confirms the submission.



Confirmation of the electronic submission is reseived to the email address provided in the registration phase. Log in to PROMAS to print the application for the signature and paper delivery. The status of the application is Submitted.



Select **View application form** and the application is opened in pdf-file. Select **Print** to print the PDF -document.

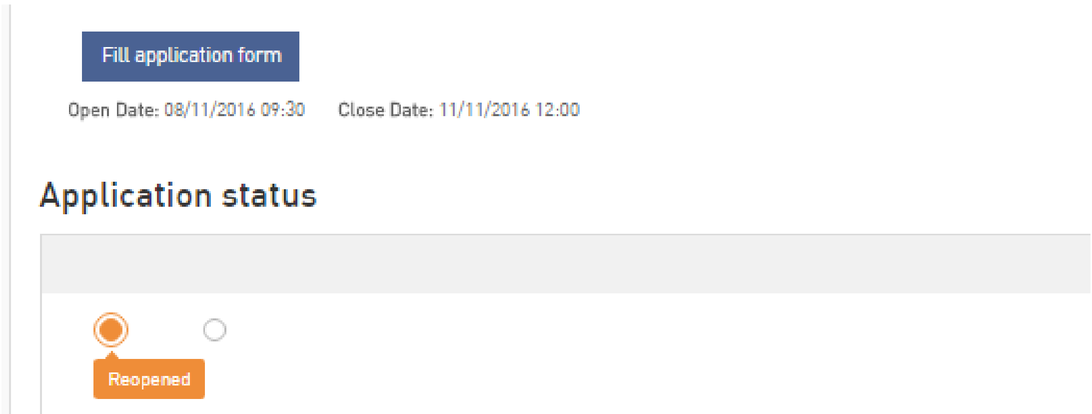
5.9 Request and submit further clarification

The Managing Authority may request further clarification to the information in the application at two different stages during its evaluation and granting process; during the administrative and eligibility checks and/or during the grant contract negotiation phase.

In such case, an email to the lead partner is send with the heading **PROMAS - Request for clarification** including the instructions of requested further clarifications and the deadline for their submission.

The information in the email may also refer to additional guidance send by the MA in written letter, in another email or in the individual consultation. Further clarification may also be an annex to the application, that needs to be downloaded to the PROMAS.

In any case, the procedure for the lead applicant follows the logic of submitting the application at the first time via Reopened form and re-submission of it.



To provide requested clarifications, follow the logic of providing the application at the first time and close the procedure by submitting it at the Signature page. The status of the application is changed to Submitted.

5.10 PROMAS statuses for application

The applicants may follow-up the application evaluation and decision-making process in the PROMAS via different statuses.

Status	Description
Submitted	• The application is electronically submitted to the MA.
Reopened	• MA has requested further clarification during the administrative and eligibility check.
Administrative check passed	• The criteria set for the administrative and eligibility check has been met.
Administrative check rejected	• The criteria set for the administrative and eligibility check has not been met.
Expert evaluated	• The quality assessment has been concluded.
Committee approved	• The Joint Monitoring Committee has approved the project proposal.
Committee rejected	• The Joint Monitoring Committee has rejected the project proposal.
Executive order made	• MA has prepared executive order and downloaded it to the PROMAS.
Reopened (negotiation)	• The project is approved for funding and MA has re-opened the application form for further clarification.
Negotiation concluded	• All conditions for the grant are met and the project is forwarded to the contracting.
Cancelled	• Conditions for the grant has not been met and the grant is cancelled.
Contracted	• The application is contracted and the features for the project implementation are available at the PROMAS.