

USER MANUAL FOR THE BENEFICIARY PORTAL

Version October 2016

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LIST OF ABBREVIATIONS

A	Action
BP	Beneficiaries electronic exchange portal/ Beneficiary portal
CMS	Content Management System
DG	Directorate General “Territorial Cooperation Management”
TCM	
IS	Information System
ISP	Internet Service Provider
JMC	Joint Monitoring Committee
MIS	Management Information System
MRDP	Ministry of Regional Development and Public Works
W	
MVC	Model-View-Controller
TA	Technical Assistance
WP	Work process

II Work processes and User tasks

The Beneficiary Portal for the three programmes are available at:

- <http://bp.ipacbc-bgrs.eu>,
- <http://bp.ipacbc-bgtr.eu>, and
- <http://bp.ipa-cbc-007.eu>.

The BP supports all work processes of the Beneficiaries of the Programmes related to interaction with the MA. The processes are split into tasks, assigned to different (groups of) users.

- WP: Management of Project beneficiaries and subusers:
 - Task: Creation of Lead partner account;
 - Task: Creation of subusers.
- Communication:
 - Upload files;
 - Read messages;
 - Send messages.
- WP: Contracting and changes:
 - Task: Request for modifications in the AF/ contract;
 - Task: Upload of a contract or addendum.
- WP: Financial reporting. FLC and payments:
 - Task: Recording of Invoices by project partners;
 - Task: Generation of Invoice reports and Requests for payment.
- WP: Reporting:
 - Task: Recording of Progress by Indicator.

III Management of Project beneficiaries and subusers

1. Creation of Lead partner account

Role: The task is undertaken by **Administrators** of the System.

Prerequisites: A project entering implementation.

Outcome: Lead partner user generated.

Task:

A1. Log-in the beneficiary portal.

A2. Select **ADMIN: Projects List** form the menu.

Project Code	Project Name	Actions
CB005.1..003	My test project 2	Generate Lead Generate Folder
CB007.1..035	Shopsko beer vs Serbian quince brandy	Generate Lead Generate Folder
CB005.1..004	0	Generate Lead Generate Folder
CB005.1..008	My Test Project	Generate Folder
CB005.1..007	My Test Project	Generate Lead Generate Folder
CB005.1..006	My Test Project	Generate Folder

A3. For a given project first **Generate folder** then **Generate lead**.

CB007.1..035 | Shopsko beer vs Serbian quince brandy: Add beneficiary

Username

E-mail

Password

Password must be at least 8 symbols, must contain at least one UPPERCASE letter, one NUMBER and one special symbol - !?%&'()*{#@#~<>_

[Generate pwd](#)

[Save](#)

Finally a list of all beneficiary accounts is shown by project.

Username	Name	E-mail	Organization	Last login	Is active	Actions
CB005.1..003 My test project 2						
1_003_so_berovo lead		so.berovo@t-home.mk	PP1: Municipality of Sofia		<input checked="" type="checkbox"/>	edit delete
CB007.1..035 Shopsko beer vs Serbian quince brandy						
1_035_so_berovo lead		so.berovo@t-home.mk	PP1: Municipality of Sofia		<input checked="" type="checkbox"/>	edit delete
CB005.1..008 My Test Project						
1_0028_so_berovo lead		so.berovo@t-home.mk	PP1: Municipality of Sofia		<input checked="" type="checkbox"/>	edit delete
CB005.1..006 My Test Project						
1_0025_so_berovo lead	0025 SO Berovo	so.berovo@t-home.mk	PP1: Municipality of Sofia	10.02.2016 10:28:14	<input checked="" type="checkbox"/>	edit delete
1_0025_nevena_kostova		nevena.kostova@gateway.bg	PP2: Municipality of Piro	02.02.2016 13:48:14	<input checked="" type="checkbox"/>	edit delete

2. Task: Creation of subusers

Role: The task is undertaken by **Lead partners** of projects.

Prerequisites: A project entering implementation and a lead partner account created by admin.


Outcome: Project partners accounts generated.

Task:

A1. Lead partner logs-in the beneficiary portal.

A2. Select **Project beneficiaries** form the menu.

+ Add beneficiary

Username	Name	E-mail	Organization	Last login	Is active	Actions
1_0025_so_berovo lead	0025 SO Berovo	so.berovo@t-home.mk	PP1: Municipality of Sofia	15.02.2016 16:36:36	✔	
1_0025_nevena_kostova		nevena.kostova@gateway.bg	PP2: Municipality of Piro	02.02.2016 13:48:14	✔	

A3. Select **Add beneficiary**.

CB005.1..006 | Shopsko beer vs Serbian quince brandy TET: Add beneficiary

Username

1_006_lomsko

E-mail

lomsko@lomsko.bg

Password

yH@2hP%7vA@0

Password must be at least 8 symbols, must contain at least one UPPERCASE letter, one NUMBER and one special symbol - !?\${}&*(){}@#~<>_

Generate pwd

Partner

PP3: Lomskopivo

Save

A4. Fill in the form and Save. The username is created from the email preceded by the call number and project number.

Only one **active** partner account per partner is allowed. If you need to a new user for a given partner **block** the existing one (**do not delete**) and then add beneficiary.

IV Communication

1. Upload files

Role: The task is undertaken by members **any user group**.

Prerequisites: An electronic file that has to be shared through the System.

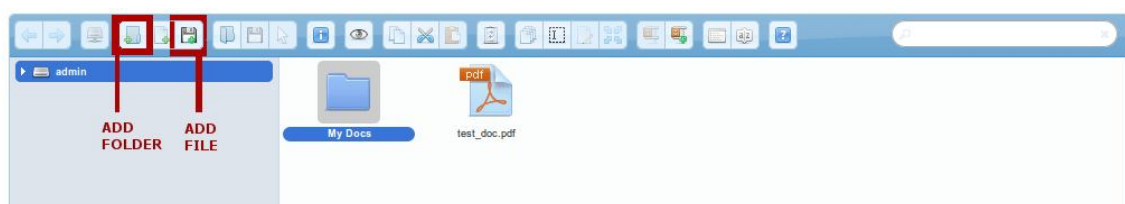
Outcome: Uploaded electronic file in the System.

Task:

A1. Select submenu File System. A File manager opens.

A2. Select a folder or create a new folder.

A3. Upload a file.



2. Read messages

Role: The task is undertaken by members **any user group**.

Prerequisites: An electronic message sent through the System to the user.

Outcome: Read message.

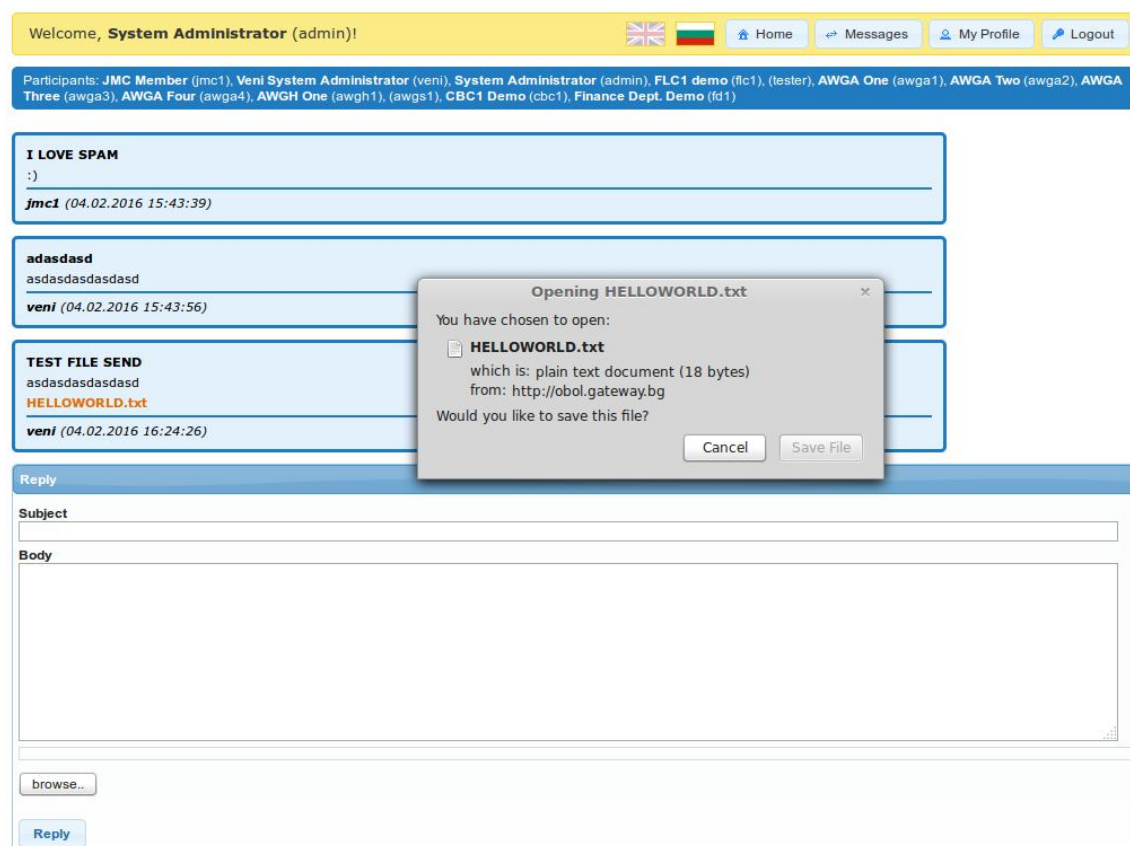
Task:

A1. Select submenu Communication, option My messages.

A2. Select a message to read and the icon in the right column.

Category: -- choose --		Project: -- choose --		Filter	
Subject	Date Created	Date Updated	Total Messages	Participants	Actions
MIS Messages					
MIS MESSAGES	Invoices	09.02.2016 11:18:05	09.02.2016 11:18:05	veni, awga1, awga2, awga3, awga4	
Just testing...	General Discussions	09.02.2016 11:48:59	09.02.2016 11:48:59	veni, flc1, jmc1, awgh1	
asdasdasd	Invoices FLC verification	10.02.2016 12:06:09	10.02.2016 12:06:09	veni, 1_0025_so_berovo, 1_0028_so_berovo, jmc1	
Start negotiations	Contracting negotiations	15.02.2016 15:45:57	15.02.2016 15:45:57	admin, flc1	
CB005.1..006 My Test Project					
Invoices & FLC	Invoices FLC verification	09.02.2016 11:16:17	10.02.2016 10:28:50	veni, 1_0025_so_berovo, 1_0025_nevena_kostova	
Beneficiary Test	Contracting negotiations Requests for changes	10.02.2016 11:29:19	10.02.2016 11:29:19	1_0025_so_berovo, 1_0025_nevena_kostova, veni	
Start of negotiations	Contracting negotiations	15.02.2016 15:46:33	15.02.2016 15:46:33	admin, 1_0025_so_berovo	

A3. Read the message.



A5. Reply using the form under the message.

3. Send messages

Role: The task is undertaken by members **any user group**.

Prerequisites: An electronic message sent through the System to the user.

Outcome: Read message.

Task:

A1. Select submenu Communication, option My messages.

A2. Select New message (to system users) or New message to beneficiaries.

A3. Select recipients by user group for system users and by project for Beneficiaries.


A4. Fill-in the message. File may be attached from the File system folders.

User manual for the Beneficiary portal - version 1.0

New Message

Send to

Admin JTS **FLC** JMC AWGA AWGH AWGS MA - External Borders MA - Financial Department AA

 **FLC1 demo (flc1)**

FLC: FLC1 demo (flc1)

Category

Requests for payments

☐ Invoices

☐ FLC verification

Contract and changes

☒ Contracting negotiations

☐ Requests for changes

Reporting

☐ FLC Visit

☐ Project Evaluation

Other

☐ General Discussions

Subject

Start negotiations

Body

The system is ready. You can start negotiations


browse...

Send

MIS - Mozilla Firefox

obol.gateway.bg/files/browse_files/#elf_l1_Lw

admin

 test_doc.pdf

2016 MRRB

A5. Send the message.

V Contracting and changes

1. Request for modifications in the AF/ contract

Role: The task is undertaken by **Lead partners**.


Prerequisites: (Conditionally) Approved or contracted project.

Outcome: New version or subversion of the AF (project information and budget).

Task:

A1. Select the **Project versions** tab for a chosen project (**view project**).

A2. Select the Edit button of the active version.

Version	Created by	Date created	Modified by	Date modified	Read new file	View	Edit	Delete	Set Active
2.1	veni	2016-02-08 01:32:55	veni	2016-02-09 13:56:27	Read new file	View	Edit	-	

A3. Propose changes to the project form by placing the mouse in a chosen field. All fields that are editable are marked with a **green triangle** in the upper right corner. After changing a field press Enter.

All fields that are computed are marked with a **red triangle** in the upper right corner.

CB007.1-999 v2.1

Save
Save subversion
Save version
Back to the project









Cover
Project Identification
PP1 (LP)
PP2
PP3
PP4
PP5
T1-PPs
T2-B(PP1)
T2-B(PP2)
T2-B(PP3)
T2-B(PP4)

T2-B(PP5)
TABLE 2 - TOTAL
TABLE 3 - SUMMARY
TABLE 4 - PP BL
TABLE 5 - SOURCES

PP3
Project partner 3

1. Identity

1.1.Contact information

Organization (In English):	Lomsko pivo Test Test	
Organization (In native language)	Пивоварна Ломско пиво	
Type of organization:	Business support structure	
Country:	BG	
District / NUTS III	Sofia	
Town:	Sofia	
Address:	dfghjkl;	
Postal Code:	10002	

BL3 - TRAVEL AND ACCOMMODATION	Unit	Expenditures in the eligible area			Expenditures outside the eligible area			TOTAL
		Units	Unit rate	Total	Units	Unit rate	Total	
3.1 Travel costs				15521			360	15881
djf	KM	200.00	1.80	360	200.00	1.80	360	720
sdf	1	20.00	6.00	120	0.00	0.00	0	120
erh	2	54.00	12.00	648	0.00	0.00	0	648
dggf	1	50.00	63.00	3150	0.00	0.00	0	3150
rte	4	52.00	23.00	1196	0.00	0.00	0	1196
dfhug	4	52.00	65.00	3380	0.00	0.00	0	3380
eriyu	2	15.00	17.00	255	0.00	0.00	0	255
euty	7	26.00	65.00	1690	0.00	0.00	0	1690

A4. If the edited version is created by the active user he can **Save** (the current version), **Save subversion** (new), **Save version** (new) or return **Back to the project** without saving.

2. Upload of a contract or addendum

Role: The task is undertaken by **Lead partners**.

Prerequisites: (Conditionally) Approved or contracted project.

Outcome: An approved contract or addendum is recorded in the MIS.

Task:

A1. Select the **Contract and changes** tab for a chosen project (**view project**).

A2. Select Add Contract and changes. It opens a form to upload the contract in printable electronic form, e.g. PDF, and to record the requisite additional information.

Add Contract & Changes

Type
Attachment (PDF, ZIP, ...)
Contract
Browse...
No file selected.

Document Number

Document Date

Editable draft version
Contract - v1.1

Bank account number

Contact details

Comment

☐ Confirmed

Save
Close

The additional data includes bank account number, contact date, draft editable version, contact details, etc.

A3. After all mandatory fields are filled in the form choose the **Save** button.

VI Financial reporting, FLC and payments

1. Recording of Contractors

Role: The task is undertaken by the **Lead partner or project partners**. The two groups have different user rights:

- LP may create, read, update, and delete information on any contractors, related to the project.
- Other PPs may create, update, and delete information on contractors, concerning their organisation, and may read recorded informatyo on all contractors, created by the LP or other PPs.

Prerequisites: A contractor is selected under the requirements of the Programme.

Outcome: Recorded information on Contractors.

Task:

A1. Select the Payments section from the left menu, then the **Contractors** option.

A2. Select the **Add record** button from the top-right corner of the work area, or the edit icon from the Actions column of the table at the right hand side. You may need to scroll the table to do so.

A3. Fill-in the form.

The screenshot shows a web form titled "Edit Record" for editing contractor information. The form contains the following fields and values:

Field Label	Value
Contractors name*	Consulting services Ltd.
Contractors uic*	222333444
Contractors name native	Консултантски услуги ООД
Contractors rep name	Ivan Ivanov
Contractors rep position	Chief consultant
Contractors address nuts3	Pemik
Contractors address city	Breznik
Contractors address street	2 Second St., apt. 2
Contractors phone	(022) 333 4444
Contractors fax	22 33 5555
Contractors email	consult@test.org
Contractors gps coord	42.610217, 23.0321167

At the bottom of the form, there are three buttons: "Update changes", "Update and go back to list", and "Cancel".

2. Recording of Procurement procedures

Role: The task is undertaken by the **Lead partner or project partners**. The two groups have different user rights:

- LP may create, read, update, and delete information on any procurement procedure, related to the project.
- Other PPs may create, update, and delete information on procurement procedures, concerning their organisation, and may read recorded information on all procedures, created by the LP or other PPs.

Prerequisites: A Procurement procedure is planned under the requirements of the Programme.

Outcome: Recorded information on a Procurement procedure.

Task:

A1. Select the Payments section from the left menu, then the **Procurements** option.

A2. Select the **Add record** button from the top-right corner of the work area, or the edit icon from the Actions column of the table at the right hand side. You may need to scroll the table to do so.

A3. Fill-in the form.

The screenshot displays the 'Edit Record' form for a procurement procedure. The left sidebar contains a navigation menu with the following items: Project Information, Payments (selected), Contractors, Procurements (highlighted), Invoices, Invoice Reports, Payment Requests, and Communication and Files. The main form area is titled 'Edit Record' and contains the following fields:

- Procurement provisional*: 2016-10-11 (Clear button) (yyyy-mm-dd)
- Procurement name*: Refurbishment of hops drying facility
- Procurement type*: SUPPLY (dropdown menu)
- PRAG version: 2
- Procurement notice date: 2016-10-11 (Clear button) (yyyy-mm-dd)
- Procurement attachment: [Image of a hop cone] (delete button)
- Procurement app deadline: 2016-10-31 (Clear button) (yyyy-mm-dd)
- Procurement award date: (Clear button) (yyyy-mm-dd)
- Procurement contract no: (text input)
- Procurement contract date: (Clear button) (yyyy-mm-dd)
- Procurement duration: 0
- Procurement end date: (Clear button) (yyyy-mm-dd)
- Procurement amount: 0.00
- Procurement amount euro: 0.00

3. Recording of Invoices by project partners

Role: The task is undertaken by **Lead partners or Project partners with respective rights**.

Prerequisites: Unrecorded paper or electronic invoices.

Outcome: Recorded invoice data.

Task:

A1. Navigate to the Payments section of a project.

A2. Select the **Add invoice** button.

A3. Fill-in the form.

Project Information

- Payments
- Contractors
- Procurements
- Invoices**
- Invoice Reports
- Payment Requests

Communication and Files

Edit Record

Invoice contractors id : Construction services Ltd. x

Invoice procurement id : Acquisition of a software platform

Invoice project partner* : PP1 x

Invoice no* : PP1-001-1

Invoice issued on : 2016-02-01 Clear (yyyy-mm-dd)

Invoice paid on : 2016-03-14 Clear (yyyy-mm-dd)


Invoice currency : BGN x

Invoice exchange rate : 61.695700

Invoice state aid : 0.00

Invoice state aid advance : 0.00

Invoice net revenue : 0.00

Invoice attachment :  delete

Update changes Update and go back to list Cancel

If an invoice report was created in advance the Add invoice button is available within the IR.

4. Generation of Invoice reports

Role: The task is undertaken by **Lead partners (Invoice reports can be generated by or Project partners with respective rights)**.

Prerequisites: Recorded invoices in the System.

Outcome: Recorded Invoice reports and Requests for payments.

Task:

A1. Navigate to the Payments section of a project.

A2. Select the **Add IR** button.

A3. Fill-in the form.

Project Information

- Payments
 - Contractors
 - Procurements
 - Invoices**
 - Invoice Reports
 - Payment Requests
- Communication and Files

Edit Record

Invoice contractors id : Construction services Ltd. x

Invoice procurement id : Acquisition of a software platform

Invoice project partner* : PP1 x

Invoice no* : PP1-001-1

Invoice issued on : 2016-02-01 Clear (yyyy-mm-dd)

Invoice paid on : 2016-03-14 Clear (yyyy-mm-dd)


Invoice currency : BGN x

Invoice exchange rate : 61.695700

Invoice state aid : 0.00

Invoice state aid advance : 0.00

Invoice net revenue : 0.00

Invoice attachment :  delete

Update changes Update and go back to list Cancel

The IR contains all invoices already attached to it. An existing invoice, not attached to any IR could be added to the current IR via the Attach invoice button. A new invoice could be added to the IR through the Add invoice button.

The sections for approval are not visible.

A4. Save the information in the DB using the Save button.

A5. Generate Request for FLC which will be filled in automatically by the system.

5. Creation of Requests for payment

Role: The task is undertaken by the **Lead partner**, who may create, read, update, and delete information on any request for payment, related to the project.

Prerequisites: Recorded invoice reports in the System.

Outcome: Recorded request for payment in the BP.

Task:

A1. Select the **Payments** section from the left menu, then the **Payment requests** option.

A2. Select the **Add record** button from the top-right corner of the work area, or the edit icon from the Actions column of the table at the right hand side. You may need to scroll the table to do so.

A3. Fill-in the form.

v 1.1.28042016

Project Information
Payments
Contractors
Procurements
Invoices
Invoice Reports
Payment Requests
Communication and Files

Edit Record

Payment request type* : Interim
Payment request request number* : sdfasdfsdfasdf
Payment request request date* : 2016-05-18 Clear (yyyy-mm-dd)
Payment request request comment :

Source
B I U abc x₂ x²
Styles Normal Font Size

body p

Payment request requested for verification* : 10000.00
Payment request requested for payment* : 10000.00

A4. In the Payment requests select the view icon (a magnifying glass) from the Actions column of the table at the right hand side. You may need to scroll the table to do so. **A tabular view of the Request for payment is shown.**

6. Submitting a Request for payment

Role: The task is undertaken by the **Lead partner**, who may create, read, update, and delete information on any request for payment, related to the project.

Prerequisites: Recorded Request for payment in the BP.

Outcome: Request for payment, submitted to the Contracting authority.

Task:

A1. Select the **Payments** section from the left menu, then the **Payment requests** option.

A2. Select the view icon (a magnifying glass) from the Actions column of the table at the right hand side. You may need to scroll the table to do so.

A3. Select the **Submit request** button. Upon submission the content of the Request for payment, e.g. its information, as well as the information on included invoice reports and invoice items is locked.

A4. BP sends automated message to the managers of the MIS about the submitted request. The message is available under section **Communication and files**, sub-section **Communication**.

A5. Feedback, e.g. request for additional information, will be delivered through the Communication subsection. If changes to the Request for payment are needed the Managing authority will unlock it.

VII Reporting:

1. Recording of Progress by Indicator

Role: The task is undertaken by **Lead partners**.

Prerequisites: Recorded indicators in the System and available data by project.

Outcome: Recorded indicator data.

Task:

A1. Select an indicator, recorded in the system.

A2. Select an indicator, a call and a project.

Indicator:

Total number of reconstructed/restored cultural and historical touristic objects in the eligible border area

Call:

Call 1 BGRS [CB007.1]

Project:

CB007.1.22.002

Filter

A3. Fill-in the indicator progress form.

Indicator progress

CB007.1.12.0667 | Shopsko beer vs Serbian quince brandy

Indicator:

Total number of reconstructed/restored cultural and historical touristic objects in the eligible border area

Target:

5

Reached value:

3

Type:

Interim

Comment

Save

Close