USER MANUAL FOR
THE BENEFICIARY PORTAL

Version October 2016

CONTENTS

LIST OF ABBREVIATIONS

A	Action
BP	Beneficiaries electronic exchange portal/ Beneficiary portal
CMS	Content Management System
DG TCM	Directorate General "Territorial Cooperation Management"
IS	Information System
ISP	Internet Service Provider
JMC	Joint Monitoring Committee
MIS	Management Information System
MRDPW	Ministry of Regional Development and Public Works
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

1_035_so_berovo

E-mail

so.berovo@t-home.mk

Password

tC&6sI$0fK@9

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		✔	✎	⊘	🗑
*CB007.1..035	Shopsko beer vs Serbian quince brandy*							
1_035_so_berovo lead		so.berovo@t-home.mk	PP1: Municipality of Sofia		✔	✎	⊘	🗑
*CB005.1..008	My Test Project*							
1_0028_so_berovo lead		so.berovo@t-home.mk	PP1: Municipality of Sofia		✔	✎	⊘	🗑
*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	✔	✎	⊘	🗑
1_0025_nevena_kostova		nevena.kostova@gateway.bg	PP2: Municipality of Pirot	02.02.2016 13:48:14	✔	✎	⊘	🗑

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.

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 Pirot	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**.

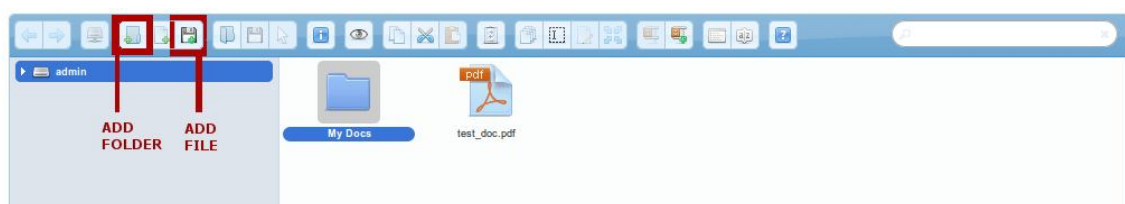**Prerequisites**: An electronic file that has to be shared through the System.

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.

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.

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 requrements 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.

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 proce-
dure, related to the project.

- Other PPs may create, update, and delete information on procurement procedures,
concerning their organisation, and may read recorded informatyo on all proce-
dures, created by the LP or other PPs.

Prerequisites: A Procurement procedure is planned under the requrements 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.

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.

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.

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.

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.

A3. Fill-in the indicator progress form.