INTERREG VI-B IPA ADRIATIC IONIAN

IPA ADRION

GUIDELINES FOR THE ASSIGNMENT OF PROJECT PRIVILEGES AND VISUALIZATION OF CONTRACTING SECTION IN JEMS

Version 2.0 – October 2024

Interreg Co-funded by the European Union

IPA ADRION

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1. PURPOSE

This guidance contains key technical information on the operation and use of the **Joint Electronic Monitoring System (JEMS)** of the INTERREG VI-B IPA Adriatic – Ionian (IPA ADRION) Programme.

Lead Partners are requested to assign **Project Privileges** to each user who works on the project, according to their role (Lead Partner, Project Partner) and give the proper access rights (view, edit, manage); this assignment will allow users to see and/or manage different sections of JEMS (as **Contracting section**).

It is therefore **highly recommended** to read this document carefully before starting to use the system.

In order to work in JEMS, each user must be registered first. More instructions in **paragraph 3 – Registration and login.**

2. TECHNICAL INFORMATION AND SYSTEM REQUIREMENTS

JEMS is a web application which can be accessed with **last or last but one** version of most common browsers (Firefox, Chrome, Microsoft Edge, Safari).

Firefox/Chrome are strongly recommended.

The functionality of the system follows the common standards of web applications for entering and submitting data.

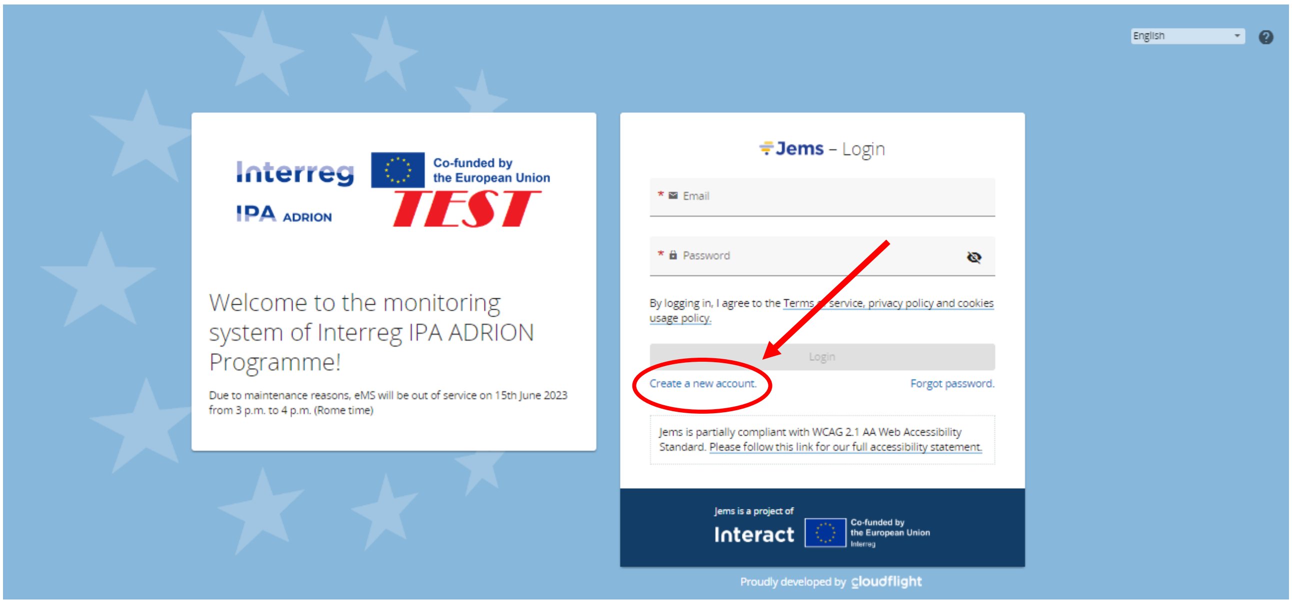
3. REGISTRATION AND LOGIN

You can access JEMS directly through the following link: https://jems.regione.emilia-romagna.it or via Programme site: https://www.interreg-ipa-adrion.eu/

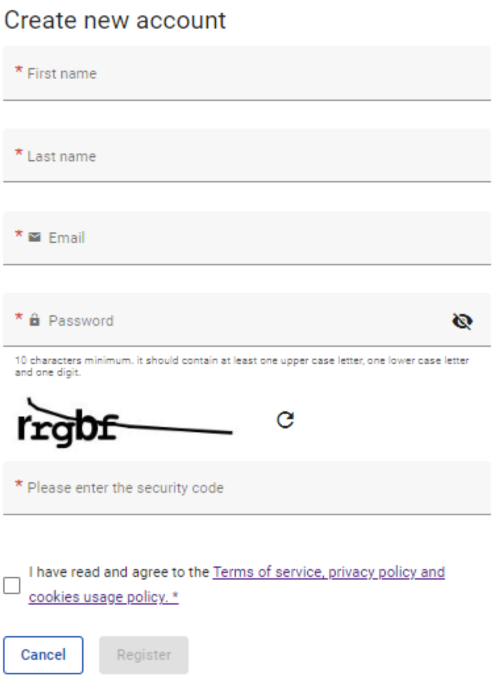
Do not get confused: be sure to register in **IPA ADRION JEMS**, since many other Interreg programmes are using the same system!

The Lead Partner is requested to share instructions on registration and login with its Project and Associated Partners.

- Project Partners users (**PP**) must first register by clicking on **"Create a new account"** on the homepage and providing a set of credentials in order to get their personal account:



- In the registration form:



the following information of the PP user is to be provided:

First / Last name	First and last name.
E-mail	The e-mail address of the user has to be used.
Password	Define the password to access JEMS. The password must be at least 10 characters long, contain at least 1 upper case letter, 1 lower case letter and 1 digit. If you use "copy" and "paste", do not leave empty spaces in the password box.
Security code	Insert the captcha code provided in the field. If you are not sure about it, click on the refresh arrow on its right side.
Tick the box	After reading our terms of services, privacy and cookies policies (accessible through the hyperlink on the web page), do not forget to tick the box on which you confirm you are aware and agree with those documents.

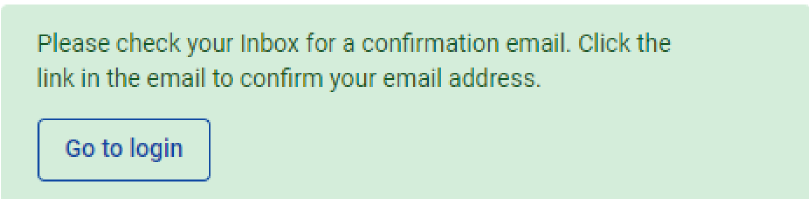
- The **"Register"** button turns active only when all the fields are correctly filled-in. Click **"Cancel"** to return to the login page

Remember that **at least the Contact Person per each PP is required**. Its contact details must be in accordance to what it is reported in the PP **Section B** of the Application Form.

Avoid generic e-mail address of your institution as well (e.g.: *info@yourinstitution.com* or *admin@yourinstitution.com*).

Please note that the responsibility of proper use of account credentials, in line with GDPR, lays within the Lead Partner.

- Following the registration, a green alert appears and a **confirmation e-mail** is automatically sent to the e-mail address indicated in the registration (remember to check also your spam if you do not receive it)

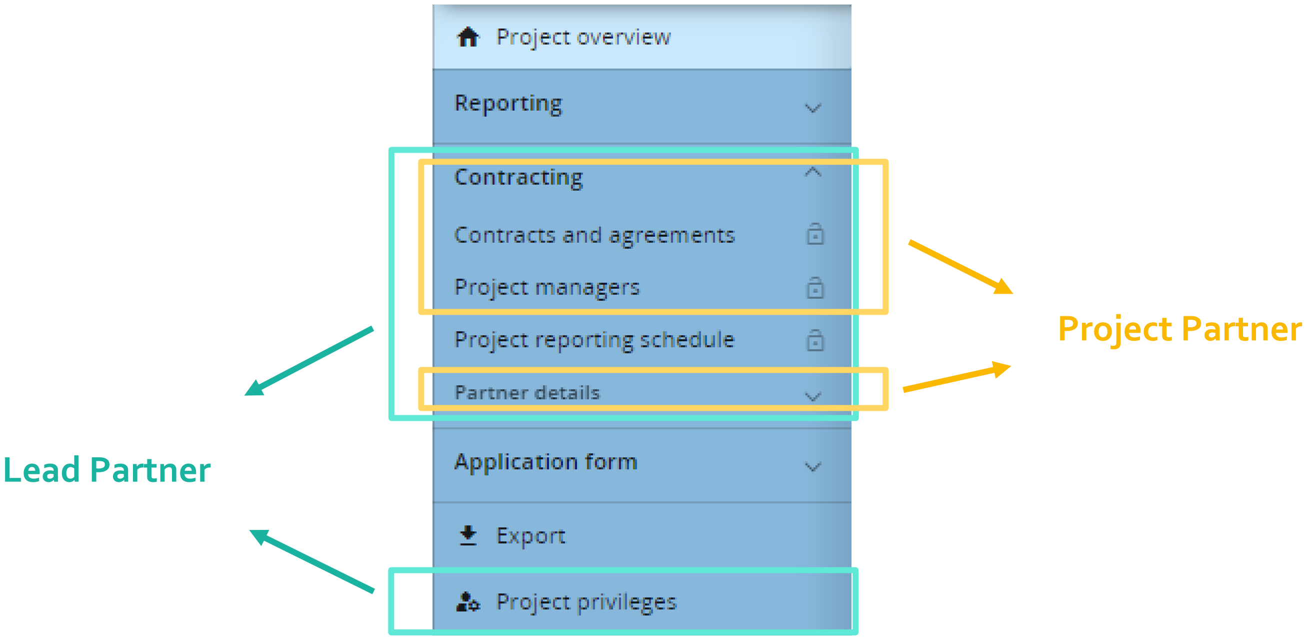


- Only after confirmation (click just once on the link), the user will be able to login and work on JEMS

4. PREREQUISITES AND ACCESS TO THE SECTIONS

Entering the project, the **Lead Applicant** (who will now turn to be **Lead Partner**) and the **Project Partner** can see and have access to different sections displayed in the left side menu, according to their roles. Namely:

Lead Applicant / Lead Partner	Project Partner
Contracting:	**Contracting:**
• Contracts and agreements • Project managers • Project reporting schedule • Partner details	• Contracts and agreements • Project managers • Partner details (only its own)
Project privileges	----



In order to see these sections, users must be assigned to the specific PP in the Project privilege section.

5. HOW TO ASSIGN PROJECT PRIVILEGES

JEMS' logic is to allow multiple beneficiaries to collaborate together in the project as teams. There are two types of teams:

1. **The Lead Partner** - All users of this team are allowed to view/edit the AF and the contracting sections
    a. Special privilege **manage** allows the user management of all the teams

2. **Project partner team(s)** - Set of users that collaborate together as work force for each partner
    a. In the **contracting section** and the **reporting section** the Project partner team(s) shall have rights over their own dedicated section;
    b. **Sensitive data** enables protection of person related data according to GDPR. Users with active flag are able to mark (and view) sensitive data in **List of Expenditures** and **Procurement** sections in Partner reports.

While creating the application form, the Lead Applicant (**LA**) has **manage** rights at project level. When the project turns to status *"Approved"*, the project **privileges on partner level** appear.

Therefore, privileges will be split into:
- access rights on **project level**
- access rights on **partner level**

The assignment of users to project partners (PPs) gives PP users access to their own dedicated part of the **Contracting** and **Reporting** sections of the project.

Here the LP allows multiple users to work together in a project by managing the access rights of all other users of the project, starting with the **LP user**.

In any case, the name of the person who has created the application form will always appear as the user who made the first submission, and cannot be changed.

5.1 PROJECT PRIVILEGES – RIGHTS ON PROJECT LEVEL

During the contracting phase (that is to say **before** the project switches to *"contracted"*) the **Lead Applicant** must turn into **Lead Partner**.

To do that, first of all **the LP must assign itself the "Lead Partner" role with manage rights**. In this way, the LP will also be able to set the access rights of all other users in the project to their own dedicated part in **Contracting** and **Partner report** sections, including the access restrictions to **sensitive data** (e.g. data contained in and referring to a payroll).

Any other coworker who will help the LP in managing the project must be assigned here, and can be given either **manage** or **edit** rights.

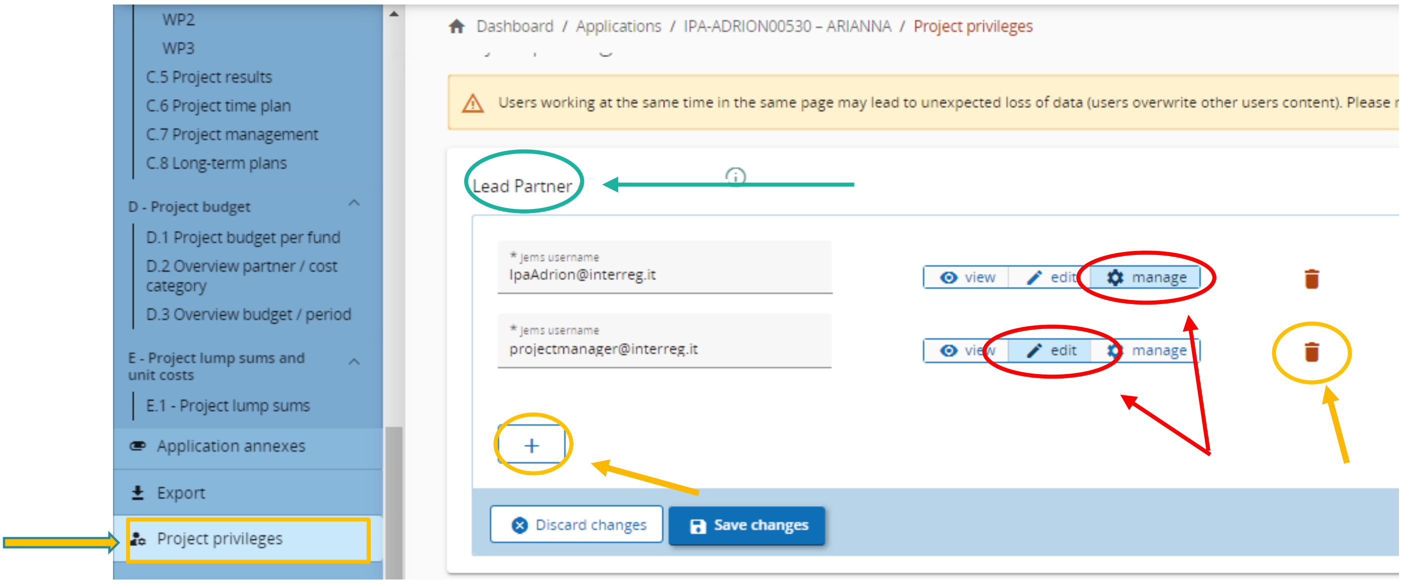
Each user can be added simply clicking on the **"+"** button and inserting its JEMS username (=e-mail used to register in JEMS). After successful assignment, the user will see the respective project in its Dashboard. To remove a user, simply click on the **"trash"** button.

Remember that at least one user must have **manage** rights.

Different access rights can be granted:

- **Manage**: allows to assign/remove users on project and partner level
- **Edit**: allows writing access at project level (e.g. AF, Contracting, Project report)
- **View**: allows read access to the application form (***default right***)

In **"Lead Partner" section** the usernames of the LP and of any other user who manages the project must be entered.

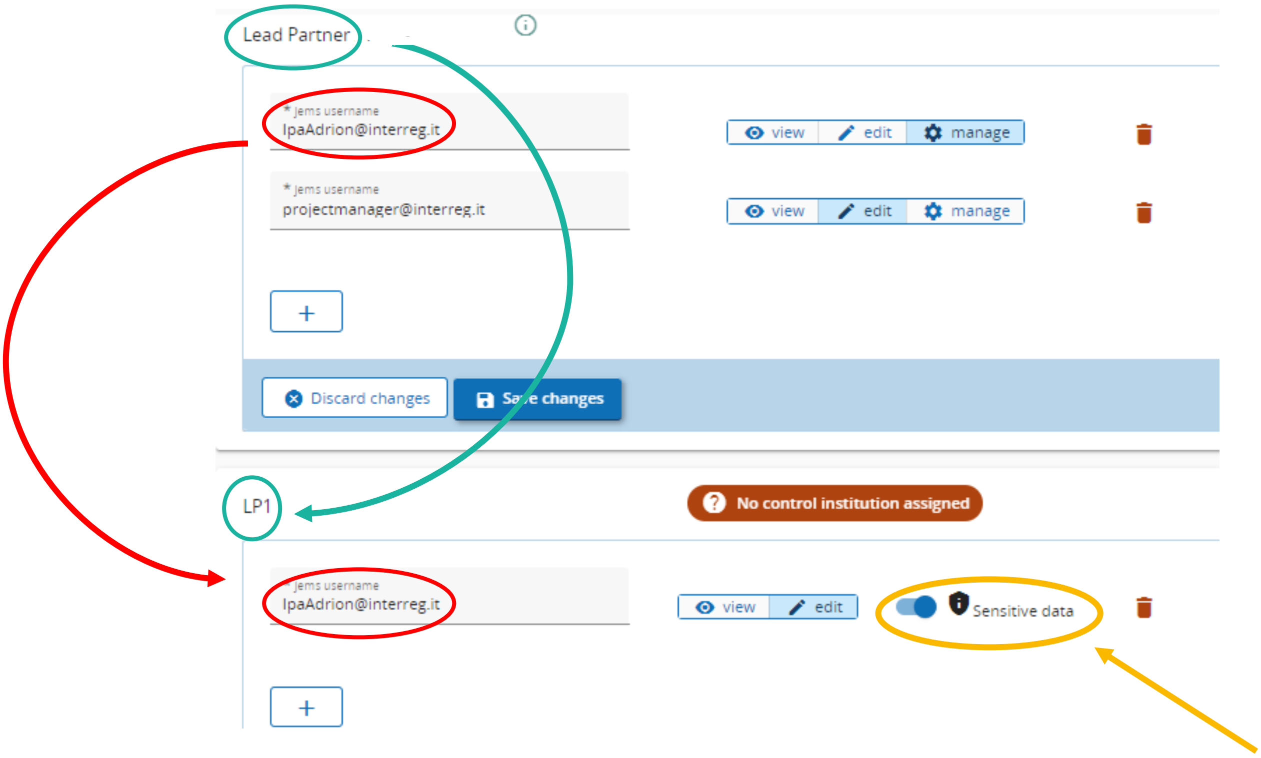


BE AWARE of the RISK OF OVERWRITING INFORMATION in case several users with edit or manage access rights work in parallel in the same AF!

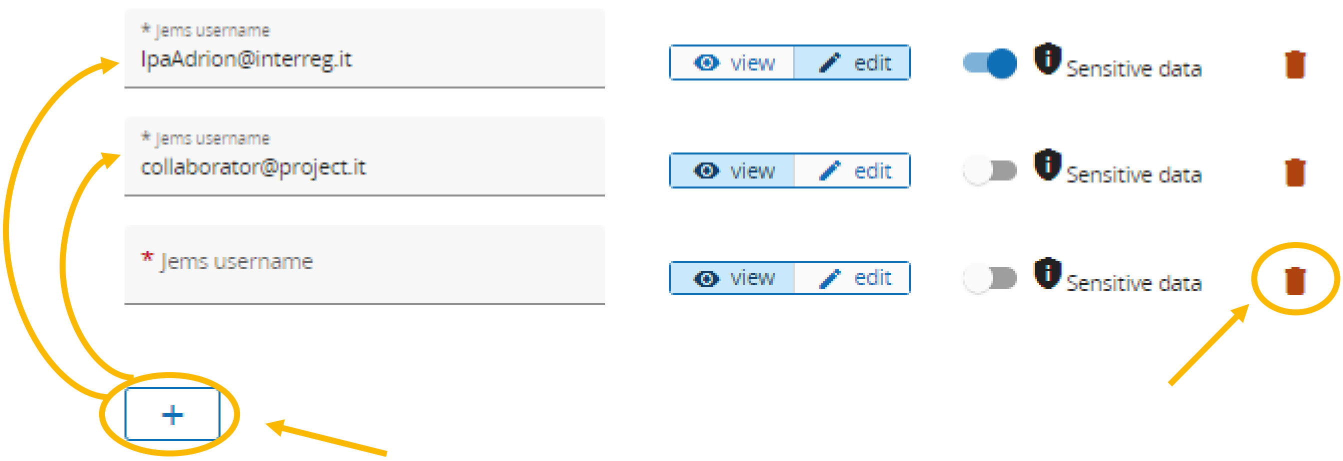
We warmly suggest being very careful when granting access rights to other users and **coordinate** who is working when in the AF. Parallel working, in particular in the same AF section should be avoided, since there is high risk to overwrite information of another user or having inserted information not saved.

5.2 PROJECT PRIVILEGES – RIGHTS ON PARTNER LEVEL

After granting rights at project level, the LP user must indicate its username and the one of every other eventual user who collaborates, this time as Project Partner, **also** in the **LP1 section,** being careful to give the proper right (**edit** or **view**) and confirming or not the access to sensitive data.



Each user can be added simply clicking on the **"+"** button and inserting its JEMS username (= e-mail used to register in JEMS). To remove a user, simply click on the **"trash"** button.



Different access rights can be granted:

- **Edit**: allows writing access at partner level
- **View**: allows read access at partner level (***default right***)

The assignment of a user gives access to:

- its own **Partner report** (- **PaR** -)
- its own part of **Partner details** in the **Contracting section**

In order to fulfil the LP tasks and do the reporting on project level, the LP should have view access to the partner reports of all project partners!

Therefore, together with the Project partner users, <u>the LP user must be assigned to each PP only with view rights.</u>

For approved projects, once assigned by the respective national body, the section also displays the name of the **control institution** of a PP:

No control institution assigned ← <u>BEFORE</u> control institution assignment

<u>AFTER</u> control institution assignment → Italian First Level Controller Institution

Project privileges are related to the specific project: a user who collaborates in many projects can have distinct privileges in each of them.

Remember that the LP must be assigned **both as Lead Partner and as LP1**.

A user who is assigned to a Project partner gets automatically view access to sections on project level (AF, Contracting, Project report). Thus, there is no need to assign a user to the lead partner on project level in order to grant read access to e.g. the application form or project reports.

5.2.1 RESTRICTION ON SENSITIVE DATA

As highlighted before, the LP (manage rights) must set the access to sensitive data. This toggle **enables the protection of person related data according to GDPR** (General Data Protection Rule).

<u>Therefore, its settings should be done with great care.</u>

Controllers (only for the specific PP they are assigned to) and programme users with monitoring tasks (**JS, MA**) can always see content marked as sensitive in the related partner report sections.

The GDPR flag needs be configured for each user.

Move the button to the right to set the flag active and to allow access to sensitive data. Users with active flag are able to mark (and view) sensitive data in list of expenditure and procurement section in partner reports. For more details, please see JEMS guidance on Partner report.

Access to sensitive data denied

Access to sensitive data granted

6. CONTRACTING SECTION

In order to have access to this section, the project needs to be at least set to the status *"approved"*.

6.1 CONTRACTS AND AGREEMENTS

This sub-section can be **edited** by the **JS**, **MA** and **LP**. **PPs** have **view access**.

You will notice that some information is already filled-in, automatically taken from other sections of the system, while some others need to be completed.

The red asterisk (*) indicates a field which must be filled-in mandatorily.

- **Project start date:** automatically transferred from the internal section **Contracting → Contract monitoring** (*filled-in by JS*)
- ***Project website (URL):** needs to be entered by the LP
- **Subsidy contract date:** automatically transferred from the internal section **Contracting → Contract monitoring** (*filled-in by JS*)
  - *The pdf of the signed Subsidy Contract is uploaded by the JS/MA*
- ***Partnership agreement signature date:** needs to be entered by the LP
  - *Partnership agreement pdf must be uploaded by the LP in* ***Attachments → Contract & supporting documents → Contracts***
- Finalised and approved project Monitoring Plan is uploaded by the JS

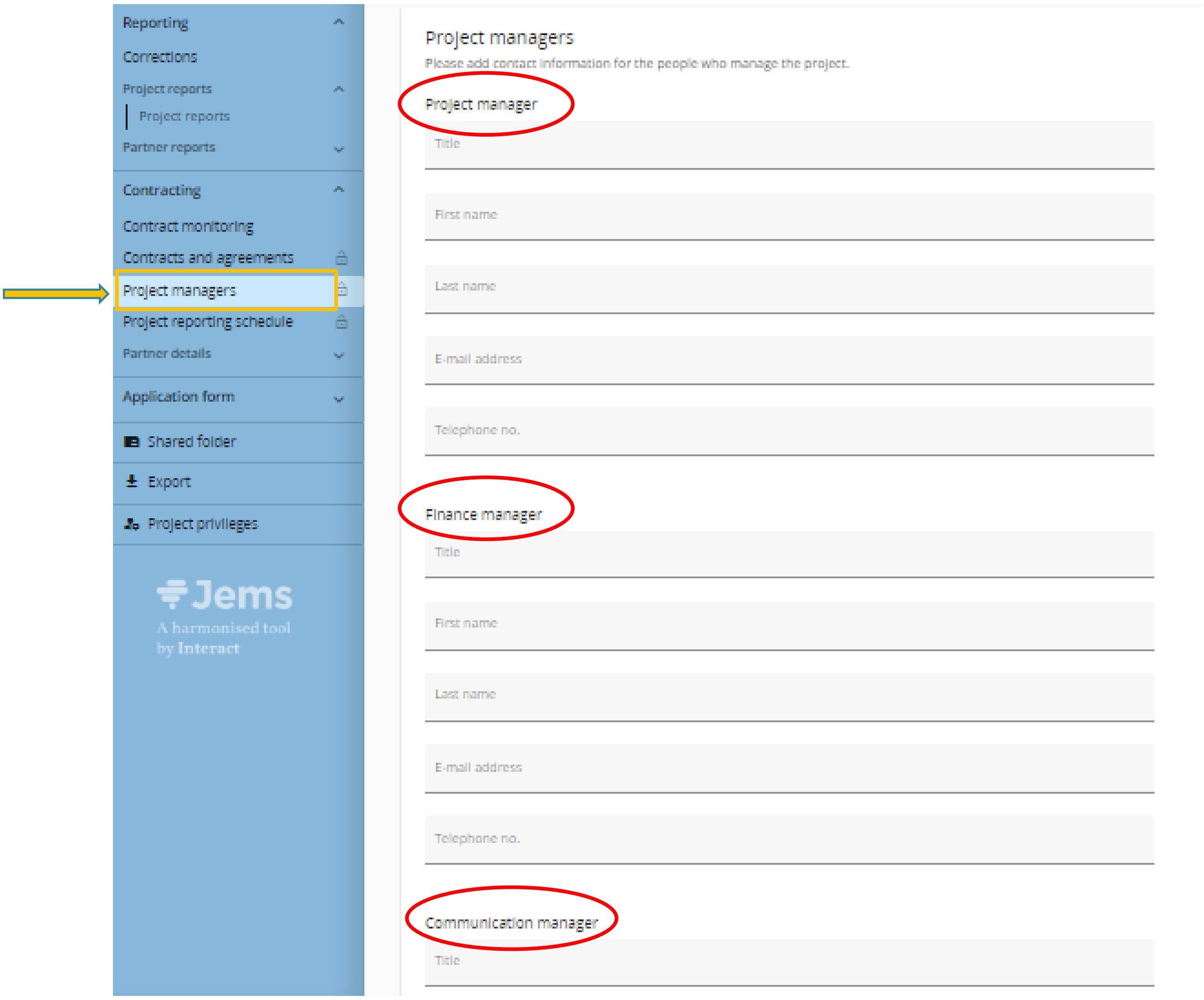
Please remember that, in order to **upload** a document, you must **first select the relevant sub-section** the file refers to (***Contracts*** or ***Project***).

All uploaded documents related to contracting will appear in **Attachments → Contract & supporting documents** and can be **edited, deleted** or **downloaded** thanks to the specific buttons:

6.2 PROJECT MANAGERS

This section provides information on project, finance and communication managers of the project.

Information should be filled-in by the LP.



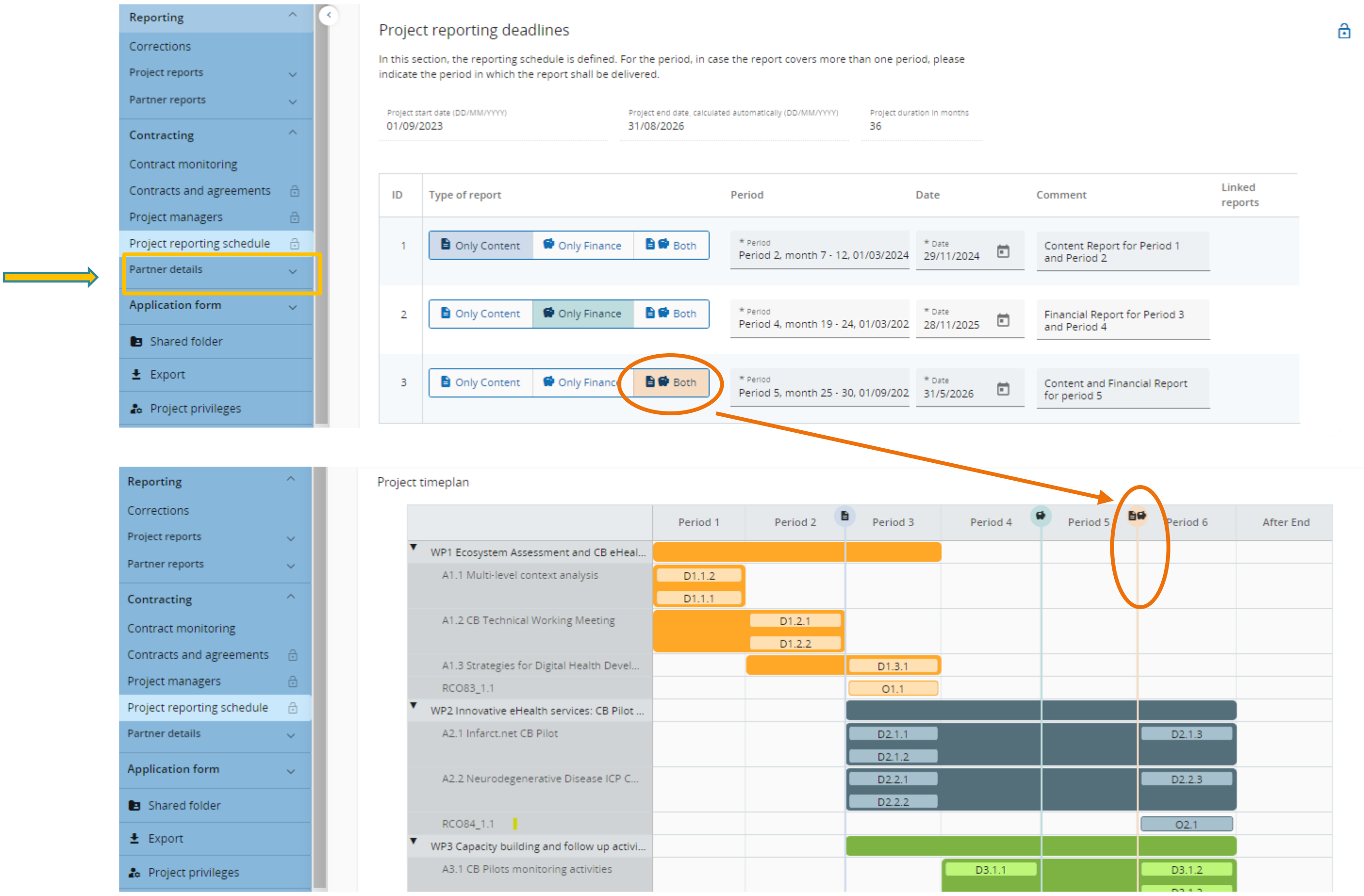
6.3 PROJECT REPORTING SCHEDULE

In this sub-section the **LP** has **view access** to the project reporting deadlines and project timeline overviews as set by the **JS/MA**.

In this way, it can have a clear vision of the next steps that have to be taken in order to follow the timing envisaged by the project, and they can organize their activities accordingly.

The **project reporting deadlines overview** displays the project's start date, end date and duration, as well as:

- **ID:** identification number of the report requested (*it will be visible when filling-in the* ***project report***)
- **Type of report:** it can be requested a report dealing only with **content** part, only with **financial** aspects, or a combination of **both**
- **Period:** period to which the report must refer to
- **Date:** delivering deadline of the project report to the JS/MA
- **Comment:** provides further information (e.g. if the report refers to more than one period)
- **Linked reports:** once the project report is created, its number will appear in this column



The pre-defined reporting periods are displayed in the **project timeplan overview**, as well as all the delivery deadlines for Deliverables, Outputs and Results, across all WPs.

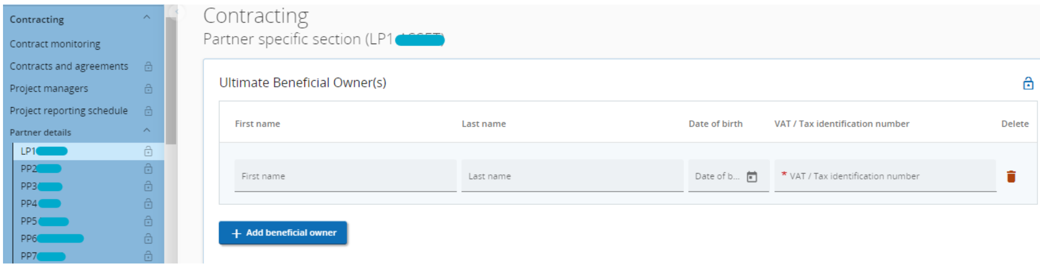
6.4 PARTNER DETAILS

The **LP** and all the **PPs** must provide the following information pertaining to their respective organisations:

- **Ultimate Beneficial Owner(s)**
- **Bank details**
- **Location of documents**

6.4.1 ULTIMATE BENEFICIAL OWNER(S)

Only in case of private partner, information on the Ultimate Beneficial Owner(s) **should be provided.**



6.4.2 BANK DETAILS

The **LP** must provide information on the bank details of its organisation. In case of changes of the bank account details, LP is required to provide a prompt information to the JS via the following e-mail address: **IPA-ADRION@regione.emilia-romagna.it** and update immediately the dedicated section in JEMS.

Information on the bank account details **should be provided by the LP**.

Only in case the LP is <u>not</u> Italian, it is required that the Italian PPs provide the information on their bank account.

6.4.3 LOCATION OF DOCUMENTS

The **LP** and all the **PPs** must provide information on the location of documents by indicating where the original documents are stored.

Information on the location of documents **should be provided by the LP/PP**.

7. HELPDESK

For any question you may have with filling-in of the Application, you can address to the helpdesk: **IPA-ADRION@regione.emilia-romagna.it** (please quote **"JEMS - 1 Call"** in the subject of the e-mail)**.**