



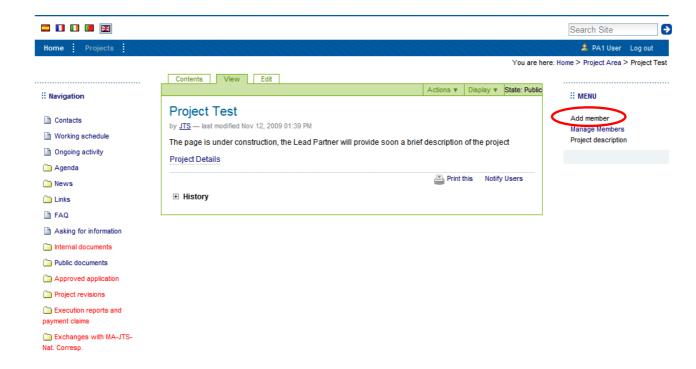
How to make available your Report and Request for Reimbursement to your 1st level financial controller?

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:

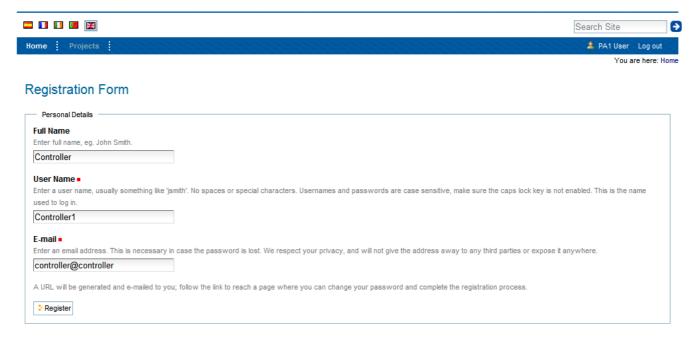
 The <u>Lead Partner</u> must <u>register</u> the <u>financial controller of each partner</u> choosing "Add member". This step gives the controller access to the "Projects" section of the website (<u>only Lead partners project could give this access</u>).





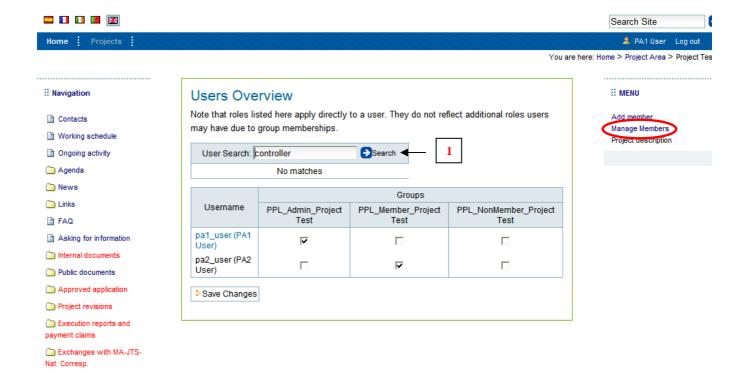


The Lead Partner must fill in the **registration form** with the name, user name and e-mail address of the financial controller. The financial controller will receive an e-mail with a link to choose a password. Note that the controller needs to know his/her username, ask him/her to choose one before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



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.

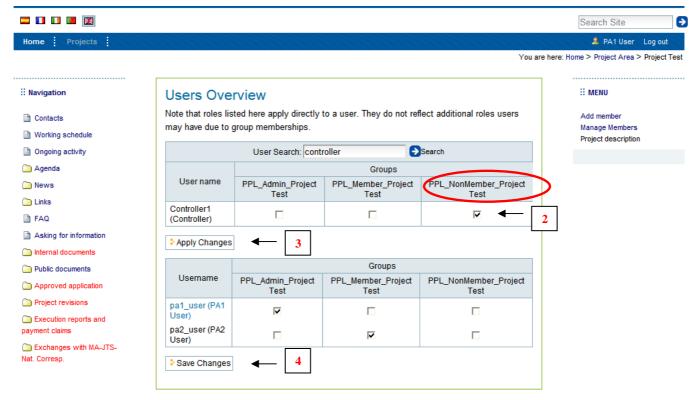






Secondly, the Lead Partner adds it to the group "PPL_NonMembers_ < Project>",

Clicks in "Apply changes" 3
"Save Changes". 4



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."

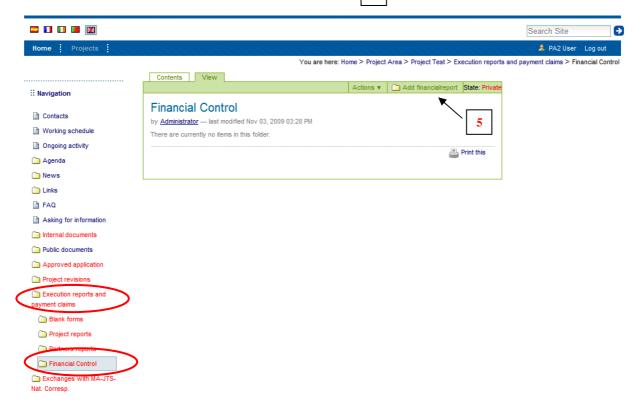
Once this process is done by the Lead Partner, a specific partner is in capacity to give access to his own controller to the specific file regarding his expenditures.

It is only the Partner that can give this specific access.

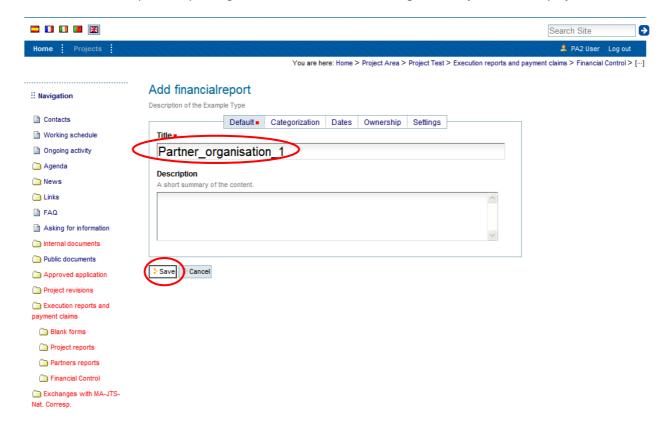




2. The <u>Partner</u> creates a specific folder in the Execution reports and payment claims section / Financial Control folder, through the option "Add financialreport" 5

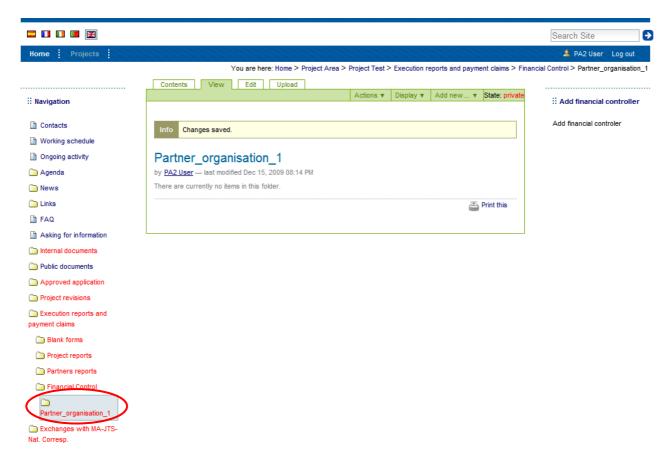


To be as clear as possible, please give to this folder the name of organisation partner of the project.

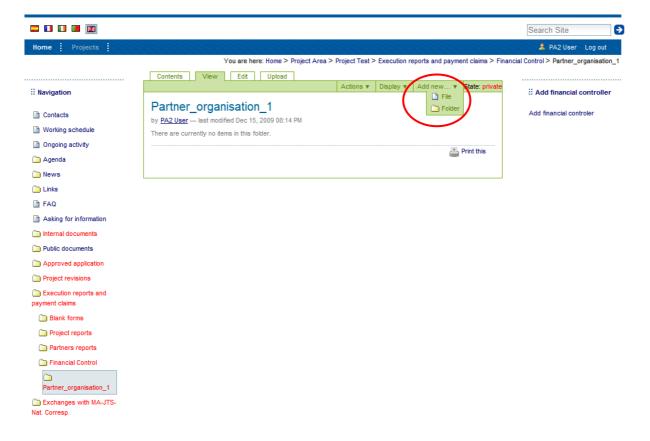








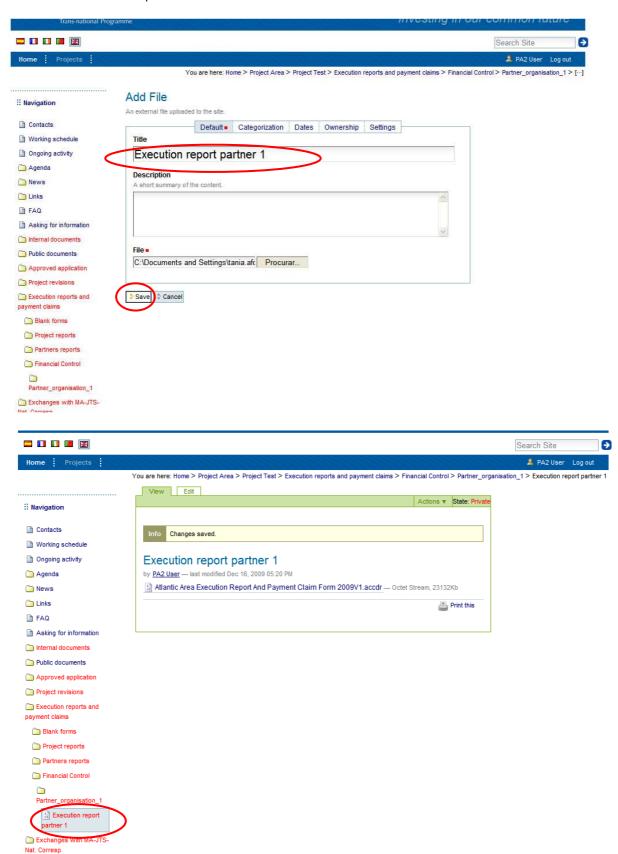
To **upload your Execution report and the Request for reimbursement**, in the folder previously created, the partner must click in "**Add new**" and choose "**File**".







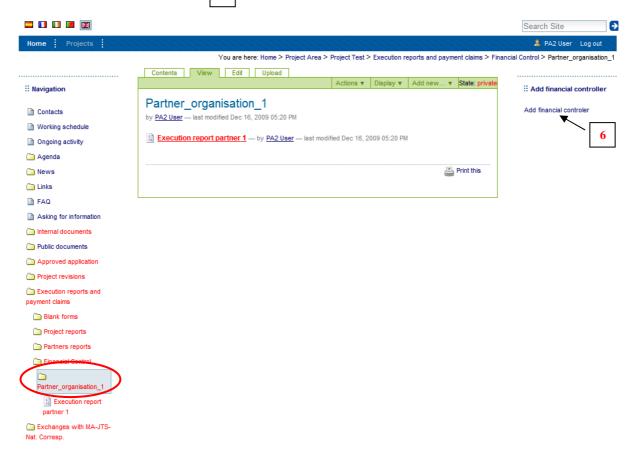
Insert the title and upload the file.







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"

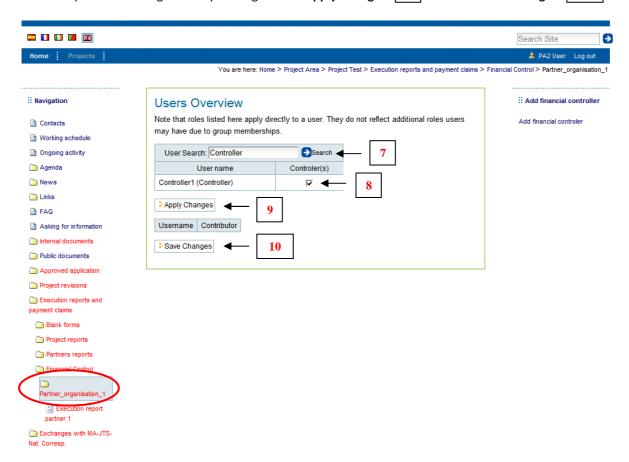




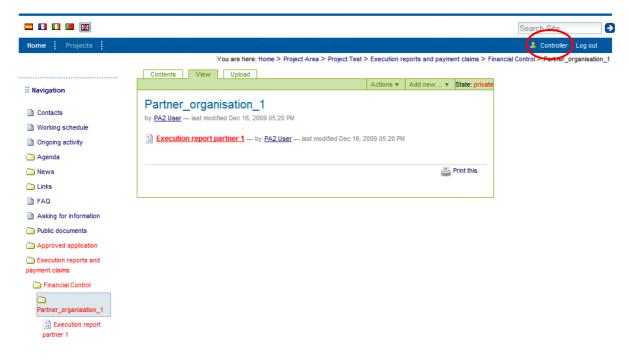


Search the name of Financial Controller
Place a tick in the respective user 8

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.